**Introduction to Exam Management in VBMS (Part 1)**

**Slide 1**

Welcome to the Compensation Service’s Introduction to Exam Management in VBMS

**Slide 2**

Utilizing the training material, VBMS Core User Guide, and available references, claim processors will be able to identify the fundamentals of Exam Management in VBMS, and complete the post-assessment with a minimum of 80% accuracy.

**Slide 3**

You may refer to the listed references for more information on Exam Management feature in VBMS. You may access a copy of the VBMS Core User Guide from the Compensation Service Intranet Homepage, by selecting the Veteran Benefits Management System (VBMS) on the left-hand side menu, then going to Resources and finally selecting Release Information and User Guides.

**Slide 4**

VBMS-Core has developed the Exam Management feature to initiate and manage exam scheduling requests solely from within the VBMS-Core application.

Scheduling requests can be created for all claims with a Benefit Program Type of ‘CPL’ (live veteran claims), with the exception of spousal A&A and helpless child.

Scheduling request for all contention types can be initiated, except if the contention is ‘non-medical’ or the contention classification is an ‘administrative issue’.

This feature will provide integration with the various Exam Management Systems (EMS), which include VHA and multiple VBA Exam Contractors.

For the VBMS Release 14.1, only VBA Exam Contractors are supported, with the exception of QTC. QTC will be supported by mid-April 2018.

VHA System Integration with VBMS is under development.

Until VHA system with VBMS integration is implemented, claim processors must continue to use the Exam Request Builder (ERB) and CAPRI for requesting exams from a VA Medical Center.

The Data Access Services (DAS) are the services related to storing, retrieving, or acting on data kept in a database or repository. More about DAS will be discussed in subsequent slides.

**Slide 5**

I will now review some familiar terminology in context with the environment of Exam Management in VBMS.

In Exam Management…

with **Exam scheduling request** – VBA will send a list of contentions to the examining entity requesting that all appropriate examinations necessary to provide required DBQ results be scheduled.

**Disability Benefit Questionnaires (DBQs)** – are a part of an exam(s) result package, not the exam itself. VBA designates required DBQ results that must be included in the results package for the package to be considered minimally sufficient. Clinicians add additional DBQs to results package as findings dictate.

**Examinations** – are clinical encounters scheduled by the examining entity (VHA or VBA Exam Contractors) to provide necessary answers to be documented in DBQ(s). This includes all normal exams as well as lab work, imaging, and other tests and clinical studies.

**Slide 6 & 7 (Handout)**

The next two slides, I will show an illustration of the exam scheduling request process as it has been and where we are headed with the VBMS 14.1 Release and beyond. This document is available to download to your desktop or personal drive.

In the Exam Integration As – Is diagram, you can follow along starting with the panel to the left…in the second panel…in the third panel…in the fourth panel

In the Exam Integration To – Be diagram, you can follow along starting with the panel to the left…Determining Scheduling Request…in the second panel…Destination Location…in the third panel…Track Item…in the fourth panel…when exam is completed.

Data Access Services (DAS)

**Slide 8**

With the VBMS Release 14.1, these are the expectations of Exam Management functionality:

**Data and language automation**

The system will gather and consolidate pertinent scheduling request data

Claim processors will have the ability to add a Veteran’s Preferred Geographic Location at the exam scheduling level.

The system will recommend DBQs based on selection of contention classification.

The system will generate all of the language for scheduling request – to include Claim Information, Contention Information and exam specific language (such as military occupational specialty (MOS), stressor information, and unemployability, when needed).

However, for VBMS Release 14.1, claim processors will need to use Exam Request Builder – Simplified (ERB-S) for claims involving Military Sexual Trauma (MST) and Female Sexual Arousal Disorder (FSAD). This will be discussed later on in the presentation.

**Destination determination**

The system will automatically select a contract vendor based on the Veteran’s address (or Preferred Geographic Location at the time of the exam request) and the contracted vendor availability rules programmed into the system.

**Preview, editing and final submission**

The system allows the claim processor to Preview the exam scheduling request prior to submission.

**System consolidates and sends exam scheduling request**

The system will consolidate user input and Corporate information into the VBMS eFolder as a PDF and will transmit data package to the Contract Exam Vendor.

A tracked item is created for each contention.

And tracked item suspense dates will auto-adjust based on scheduled appointment dates provided by the Vendors.

**System receipt of status updates and exam results**

The system will update statuses, per contention as exams are ordered, completed, canceled and rescheduled, automatically updating each contention tracked item.

Exams ordered by VBA Contractor for each contention will be displayed.

While in Triage status, VBA contractors will be able to electronically submit for clarification of data or narrative inconsistencies directly to VBMS

And will be automatically routed by National Work Queue (NWQ).

The system will receive a notification of “Complete Package Indicator” and closes tracked item for each individual contention.

Exam results automatically populate in the VBMS eFolder.

Sufficient exam results packages must include all DBQs required, as stated under the contention in the scheduling request, plus any additional DBQs identified as needed during the exams.

**Exam related deferrals**

A draft deferral exists with only exam primary reasons. Scheduling an exam or creating exam-related

tracked items will move the Draft deferral to Resolved.

**Slide 9**

At this time, I will discuss the examination request tools that are still required with the VBMS Release 14.1.

**Slide 10**

A simplified version of Exam Request Builder, called ERB-S will be used, occasionally, to add required exam-related language to a contention.

This is a workaround that allows claim processors to input exam-related language in the exam scheduling request, as a result of a Court decision or procedural guidance, while awaiting integration of this language into the current version of VBMS.

As previously stated, for VBMS Release 14.1, claim processors will need to use Exam Request Builder – Simplified (ERB-S) for claims involving MST and FSAD to include language in the exam scheduling request.

Refer to the references on the slide for more details on the required language for claims involving these contentions.

**Slide 11**

Until VBMS is integrated with VHA, use of the Examination Request Routing Assistant (ERRA) Tool is mandatory to determine if a request must go to VHA or a VBA Contract Examiner.

ERRA will no longer identify the specific contractor, as VBMS Release 14.1 will introduce a Forecaster, which will automate the selection of contract examiners associated with Veteran’s corporate address or Preferred Geographic Location.

Procedural guidance still requires claim processors to upload the ERRA Tool results into VBMS and identify the document.

Remember to review M21-1, Part III, Subpart iv, Chapter 3, Section A for the Contract Exam Exclusions List for exams that must not be requested from contract examiners.

**Slide 12 (Demo of ERRA)**

Let us take a look at this version of the Examination Request Routing Assistant (ERRA) Tool.

This version of ERRA retains the same information concerning VHA facility routing location, the routing location and exam list comments, exam type details, and approximate distance (from the ZIP code entered, including driving distance and estimated time).

However, on the Exam Category and Send Request To menu, it only directs the claim processor to Vender (use VBMS) or VA (use Capri). If the contract examination vendor is QTC, it will direct claims processors to Vendor (use CAATS).

The last sentence in the above paragraph will still provide claim processors the specific vendor for a particular zip code.

**Slide 13**

At this time, I will discuss the review of the Veteran’s Profile Screen and Contention List for accuracy.

**Slide 14**

Review the Veteran’s address and phone number in the Profile Screen and update if necessary.

If the Veteran has an Alternate Phone Number or a Preferred Geographic Location, at the time of specific claim, this information will be entered later in the exam scheduling request process.

Review the Contentions List tab to ensure the appropriate medical classification has been used. All employees reviewing a claim are responsible for ensuring all contentions are correct and verified.

**Slide 15 (Demo – Contention List)**

Let us review the fields on Contentions List in the Development Plan taskbar.

Each issue, including non-rating issues, must be entered as a separate contention. See M21-1,Part III, Subpart iii, Chapter 1, Section F for more information on identifying contentions.

If an incorrect body system has been selected or an incorrect classification used it should be corrected.

When selecting a classification, use the appropriate medical verbiage that corresponds to the claimed medical condition and select ‘Yes’ in the MEDICAL field if the contention may require an examination or medical opinion to make a determination. Otherwise, select ‘No’.

It is important to select the appropriate type for the claim contention.

Contentions with a type of *increase* or *routine future exam* (RFE) must include an associated service-connected rated issue before you can add them to an exam scheduling request.

Otherwise, you will receive an error when trying to schedule a request for the *increase* or *routine future exam*.

Individual unemployability as a contention must be identified by selecting Unemployability as a classification in order to complete necessary development and exam scheduling request actions in VBMS, and selecting ‘Yes’ in the MEDICAL field.

A separate training segment will cover creating exam scheduling request for individual unemployability claims.

Remember, you only use ‘Administrative Issue’ with non-rating claims, such as dependency. Administrative Issues cannot be included in an exam scheduling request.

**Slide 16**

If you edit a contention that is associated to an exam scheduling request, the **Exam Scheduling Request Contention Notification dialog** opens to indicate that you may need to edit the exam scheduling request or submit a modification request.

If the Exam Request is in *Draft Status*, ensure the exam schedule request data is updated prior to submitting.

If the Exam Request is in *Open Status*, submit the appropriate modification request, if needed. I will discuss creating modification request in a separate training segment.

Claim processors are not permitted to delete a contention from a claim within VBMS if it is currently tied to an exam scheduling request.

When a contention associated with an exam scheduling request is deleted in an application outside of VBMS, an error icon is added to the request, and contention deleted is shown next to the contention in the summary view and the details view. You can create a modification request to cancel the deleted contentions.

**Slide 17**

I will now discuss the statuses at the exam scheduling request level, the contention level and the appointment level.

**Slide 18**

When the exam scheduling request status is in **Draft**, the request has been saved but not submitted.

You can edit and delete draft requests using the **edit request** option from the Actions menu.

The contention is also in draft status.

**Slide 19**

When the exam scheduling request is in **Processing** status, the request has been sent for submission.

You cannot edit requests in processing status.

The contention is included in a request that has been sent for submission (in processing status).

**Slide 20**

The exam scheduling request status is in **Error**, when a transmission error occurs when attempting to deliver an exam scheduling request,

rework request, a modification request, or a response to a request for clarification to EMS.

There will be no contention level or appointment level status, while the exam scheduling request status is in error.

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When the exam scheduling request status is in **Open**, the request has been successfully submitted.

You can cancel or modify an open request using the *create modification* option from the Actions menu.

I will discuss more on modification request in a separate training segment.

When the contention level status is in **Triage**, it is included in a request (in Open status) that has been successfully submitted.

When the contention level status is in **Request for Clarification**, a request for clarification has been received for the contention.

Once you submit a response, the contention status returns to what it was before the request for clarification.

The request level status is still Open.

I will discuss more on Request for Clarification in a separate training segment.

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When the contention level status is **Scheduled**, an appointment for a medical examination has been scheduled, or DBQs will be completed through the ACE process.

The appointment level status is either **Scheduled** for an exam appointment where the Veteran will report for examination

or **ACE Assigned** in which DBQs for the contention will be completed through the ACE process, which indicates that the Veteran is not required to report for an exam.

The exam scheduling request level status is still Open.

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When the exam scheduling request status is **Completed**, at least one contention has been completed, and all contentions are either completed or canceled.

If results have been received for all exams, you can request more detail regarding a completed exam using the rework option from the Actions menu.

I will discuss more on a Rework Request in a separate training segment.

When the contention level is at **Completed**, then medical examination appointments have been completed, or at least one examination for the contention was completed and all others were either completed or canceled.

When the appointment level status **Completed** means the exam appointment has been completed.

**Slide 24**

When the exam scheduling request status is **Canceled**, then the entire request has been canceled, or all contentions have been canceled.

When the contention level status is **Canceled,** then the contention has been canceled by EMS or via a modification request. When all contentions are canceled, the request will also be canceled.

When the appointment level status is **Canceled**, then the exam appointment has been canceled.

**Slide 25**

I will now discuss the exam scheduling request tracked items.

**Slide 26**

When any exam scheduling request, rework request, clarification request response, modification request is in processing status, or when a transmission failure occurs in submitting a request or response, an *exam request processing* tracked item is created, and the suspense date is set for the current date plus two days.

When the request or response has been received by the Exam Management System (EMS), the claim suspense date is updated based on the earliest actionable tracked item.

When an exam scheduling request or rework request is successfully submitted to the Exam Management System (EMS), *exam request or exam rework tracked items* are automatically created for each contention on the request, the *suspense reason is set to VA/contract exam requested, awaiting results*, and the contention suspense date is set for *30 days*.

If medical examination appointments are scheduled for a contention, the contention tracked item suspense date is set for the latest appointment date plus five days.

If all appointments are canceled, the contention tracked item is closed and the claim date is updated based on the earliest actionable tracked item.

When a request for clarification is received, an exam request - *VHA request for clarification or exam request - VBA contractor request for clarification* tracked item is created with the suspense date set to the current date and the suspense reason set to *VHA request for clarification or VBA contractor request for clarification*, depending on the exam scheduling request destination. Once you have submitted a clarification request response, the tracked item is deleted.

When medical examination results are received to the Veteran eFolder, a received date is added to the tracked item.

**Slide 21**

This concludes the first part of Compensation Service’s Introduction to Exam Management in VBMS.

If you have further questions regarding Exam Management in VBMS you may contact the following corporate email addresses.