**Slide 1**

Welcome to Compensation Service’s introduction to Request for Clarification, Modification Request, and Rework Request in Exam Management in VBMS.

**Slide 2**

Utilizing the training materials, VBMS Core User Guide, and available references, claim processors will be able to identify the steps required to respond to a request for clarification, complete a modification request, and complete a rework request, within Exam Management in VBMS, and complete the post-assessment with a minimum of 80% accuracy.

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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.

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I will now review some familiar and new terminology within the environment of Exam Management in VBMS.

**Request for Clarification** – is communication from the examining facility, indicating that additional information about an exam scheduling request or a specific contention is necessary. The request is electronically routed for review and subsequent action by claim processors is required. For example, the exam scheduling request did not identify which knee (right or left) should be examined.

**Modification Request** – is a communication from VBA, following successful submission of an exam scheduling request, allowing claim processors to change the exam request address, modify appointments, add special instructions, cancel contentions, or cancel the exam request entirely. For example, the Veteran has relocated.

**Rework Request** – is a communication from VBA, after an exam has been completed and results have been received for all contentions, if the results are insufficient or inadequate, you can create a rework request to ask for updated exams. For example, the examiner did not complete the occupational and social impairment field on the DBQ for PTSD.

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I will now discuss how to respond to a request for clarification in VBMS.

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Requests for clarification are sent from the examining facility back to claim processors, to ask for more information about exam scheduling request or about individual contentions.

You cannot modify the exam scheduling request until a response to the request for clarification has been submitted.

In a clarification request response, you can generally choose full edit or narrative response and add clarifying information at the claim level, the contention level, or both.

When the exam scheduling request does not contain any appointments, the claim processor is permitted to choose between “Full Edit” and “Narrative Response”.

In **Full Edit** mode, claim processors have the ability to change all data on the Claim Information page, with the exception of the destination of the scheduling request.

Additionally, you can remove a contention as long as it is not the only contention on the exam scheduling request.

When the exam scheduling request contains one or more appointments, the claim processor is only permitted to provide a **Narrative Response**.

You cannot add new contentions to the exam scheduling request as part of the clarification response workflow.

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I will now discuss how to respond to a Request for Clarification.

To respond to a request for clarification, claim processors can click on the Request for Clarification icon on the Exam Request Summary page and then select Respond or claim processors can click on the Actions menu on the Exam Request Summary page and select **Edit Clarification Response**.

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If the request for clarification arises at the ***exam scheduling request level*** and **the examination appointment(s) has/have been** scheduled, then select the **Claim Information tab** and enter the necessary information to satisfy the request for clarification in the **Clarification Request Response** field.

***Note***: Entry of separate clarification request responses on the **Contention Information** tab is optional in this instance.

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If the request for clarification arises at the ***exam scheduling request level*** and the examination appointment(s) **have not been** scheduled then determine whether the examination scheduling request requires edits or corrections to previous selections and examination request attributes.

If **yes**, then select the **Full Edit** button from the **Claim Information** tab and enter the necessary information to satisfy the request for clarification in the **Clarification Request Response** field on the **Claim Information** tab.

Use the remainder of the **Claim Information** tab to make any and all necessary corrections to claim-level system entries and attributes, and **Contention Information** tab to make any and all necessary corrections to system entries associated with affected contentions.

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If **no** **edits or corrections** to previous selections and examination request attributes are required select the **Narrative Response** button from the **Claim Information** tab and enter the information necessary to satisfy the clarification request in the **Clarification Request Response** field on the **Claim Information** tab, and use the **Contention Information** tab to add contention-specific clarification request responses if desired or appropriate.

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If the request for clarification arises at the ***contention level*** and the examination appointment(s) **has/have been** scheduled then select the **Contention Information** tab, and enter the information necessary to satisfy the clarification request in the **Clarification Request Response** field associated with each affected contention.

**Note**: Entry of a clarification request response on the **Claim Information** tab is optional in this instance.

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If the request for clarification arises at the ***contention level*** and the examination appointment(s) **have not been** scheduled then determine whether the examination scheduling request requires edits or corrections to previous VBMS selections and examination request attributes.

If **yes**, select the **Full Edit** button from the **Claim Information** tab; enter the necessary information to satisfy the clarification request in the **Clarification Request Response** field on the **Claim Information** tab, and use the **Claim Information** tab to make any and all necessary corrections to claim-level system entries and attributes, and the **Contention Information** tab to make any and all necessary corrections to system entries associated with affected contentions.

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If **no** **edits or corrections to** previous VBMS selections and examination request attributes are required then select the **Narrative Response** button from the **Contention Information** tab, and enter the information necessary to satisfy the clarification request in the **Clarification Request Response** field associated with each affected contention.

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In order to preview, all of the following conditions must be met:

All required fields on the **Claim Information** section are complete.

All required fields for at least one contention are complete.

Only the contentions that have all required data completed will appear in the preview.

Contentions that are queued for removal will not appear in the preview.

When the claim processor hits **Preview**, the PDF will appear in a new tab.

Claim processors may save the data associated with a response by clicking the **Save Response** button.

Also, the data will automatically save when the user navigates between the **Claim Information**, **Contention Information**, and **Preview** tabs.

Once you preview the response, you may select **Submit Response**.

No destination dialogue box appears when a claim processor submits a response to request for clarification.

The response to a request for clarification document is generated and uploaded to the Veteran’s eFolder with a document type of ‘Exam Request’ and a subject of ‘Clarification Response’.

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I will now discuss how to complete a modification request in VBMS.

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Remember, a modification request is created to change the exam request address, modify appointments, add special instructions, cancel contentions, or cancel the exam request entirely.

Modification request can be submitted for any exam scheduling request that is in **Open** status.

A modification request cannot be initiated, if a Request for Clarification has been received for the exam scheduling request and a Response to the Request for Clarification has not yet been sent.

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There are five different types of modifications that can be submitted.

**Cancel Entire Scheduling Request**: Use this option to cancel the exam scheduling request. If you select this option, you cannot select any other modification reasons.

**Cancel Contentions**: Use this option to cancel one or more contentions on the exam scheduling request.

**Change Address**: Use this option to add or edit a preferred geographic location, or use the current mailing address in the Veteran Profile.

**Modify Appointments**: Use this option to request that an appointment be rescheduled or cancelled. Submitting a request does not automatically reschedule or cancel appointments.

This option is only shown if at least one appointment has been scheduled for the exam scheduling request.

**Provide Special Instructions**: Use this option to add special instructions for one or more contentions on the exam scheduling request.

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From the Exam Scheduling Request Summary page, select the **Actions** menu next to the request you want to modify and select **Create Modification**.

The Select Modification Reason(s) tab opens.

Claim processors can select one or more **Modification types**, with the exception of **Cancel Entire Scheduling Request**.

Remember, the selection of **Cancel Entire Scheduling Request** will disable the selection of all other **Modification types**.

Select the check box for each type of modification you want to make and click the **Enter Information** tab.

Each modification reason you selected opens in a separate section.

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**Cancel Contentions…**

After selecting **Cancel Contention**, the claim processor is required to select the contentions to be canceled.

For each contention to be canceled, you must provide a reason for cancellation on the **Enter Information** tab.

If you select **Other**, you must enter an explanation in the rationale for contention cancellation box.

When a reason for cancellation has been provided for each contention selected to be canceled, the status bar below the **Enter Information** tab will turn green

Do not cancel contentions if there is an appointment scheduled within 24 hours.

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**Change Address**

After selecting **Change Address**, the **Exam Request Mailing Address** or **Exam Request Preferred Geographic Location** is displayed on the *Enter the information for new address* section.

Under the **Modification Address**, select **Mailing Address** or **Preferred Geographic Location**.

Selecting **Mailing Address** will enter the current mailing address in the Veteran profile.

To view this address, click the plus sign [+] for the **Exam Request Mailing Address** section.

Selecting **Preferred Geographic Location** will allow you to enter a *preferred geographic location* for the request.

To view the *current preferred geographic* *location*, if applicable, click the plus sign [+] for the **Exam Request Preferred Geographic Location** section.

And then select **Copy Preferred Address** to add the *current preferred geographic location* to the address entry boxes.

You can then make changes as needed.

When all required fields have been provided for the address change, the status bar below the **Enter Information** tab will turn green.

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**Modify Appointments**

This option is only shown if at least one appointment has been scheduled for the exam scheduling request.

Use this option to request that an appointment be rescheduled or cancelled.

**Note**: When a **Modify Appointments modification** is submitted, the appointments are **not** modified in VBMS.

The modification submitted is actually a *request* for the Exam Management System (EMS) to modify appointments.

In the **Appointment Modifications** section, select the check box for each appointment you want to modify.

For each appointment to be modified, the claim processor must provide the **Type** of change (reschedule or cancellation) and free text **Reason** for change (reschedule or cancellation) on the **Enter Information** tab.

When a change type and reason has been provided for each appointment selected, the status bar below the **Enter Information** tab will turn green.

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**Provide Special Instructions**

In the section for each contention for this modification, select the **Special Instructions** and enter the required special instructions for the contention.

When all required fields have been provided for the Special Instructions, the status bar below the **Enter Information** tab will turn green.

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**Cancel Entire Scheduling Request**

To cancel an entire exam scheduling request, select the **Cancel Entire Scheduling Request** check box and click the **Enter Information** tab.

Click the **Cancellation Reason** list and select a reason.

If you select **Other**, you must enter an explanation in the **rationale for cancellation of entire exam scheduling request** box.

Do not cancel contentions if there is an appointment scheduled within 24 hours.

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Claim processors have the ability to preview the PDF associated with the Modification Request.

The Preview lists the Veteran and claim information, Modification Request information entered for each modification type, and the remainder of the exam scheduling request data.

You can select **Cancel Modification**, which will discard any changes made to the modification.

Claim processors may save the data associated with a Modification Request by clicking the **Save Modification** button.

Also, the Modification Request will automatically save when the user navigates between the Modification Type, Enter Information, and Preview tabs.

Once submitted, the Modification Request document is generated and uploaded to the Veteran’s eFolder with a document type of ‘Exam Request Modification’ and the subject of ‘Exam Request’.

VBMS will attempt to submit the Modification Request to the Data Access System (DAS) for receipt by the Exam Management System (EMS).

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I will now discuss how to complete a rework request in VBMS.

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When an exam scheduling request has been completed and the results have been received for all contentions, if the results are insufficient or inadequate for a contention or contentions, you can create a rework request to ask for updated exams.

The rework option is only shown for exam scheduling request with a **Completed** status.

VBA contract examiners have a maximum of 14 days to clarify any insufficiency to avoid an insufficiency call.

If the insufficiency or need for clarification is not rectified within the time allotted, the examination will be deemed inadequate.

When the best interest of the Veteran will be advanced by a personal conference or e-mail with the examiner, such measures should always be considered.

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Select **Rework** from the **Actions** menu to the right of the request that requires rework.

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The **Select Contentions** page will open.

Claim processors are only able to select the contentions which were associated with the initial scheduling request.

Select the check box for each contention that requires rework or select the check box at the top of the column to select all of the contentions.

The Rework Request is populated with all of the data from the original scheduling request.

However, select the **Claim Information** tab and edit claim information as needed.

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Select the **Contention Information** tab.

For each contention selected for the rework request, claim processors are required to provide a **Rework Type**, one or more **Rework Reasons**, and free text **Detailed Rationale for Rework**.

Click the **Select Rework Type** and choose a type from the list, either *Insufficiency* or *Clarification*.

**Note**: When a VBA-contracted exam is found to be *insufficient*, it should not be resolved by VHA examiners.

After selecting the rework type, navigate to the **Available Rework Reasons** drop-down menu and select one or more bases for the report’s return.

You can select more than one reason at a time by holding Ctrl and clicking individual items from the list.

After making your selections, click the right arrow, and your selection is moved to the **Selected Rework Reasons** list.

Navigate to the **Detailed Rationale for Rework** and enter an explanation for the rework request.

Remember, to avoid using language that can be construed as adversarial when returning reports for clarification. Use the term *insufficient for rating purposes* rather than *inadequate examination*.

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If the contention needs resolution of a conflicting medical opinion or diagnosis, navigate to the Is Specialty Language Needed field and select the **Reconciliation of conflicting medical evidence** option.

Complete the **Description of Conflicting Medical Evidence** and any other fields, as applicable.

If a rework request is needed on another contention, select the plus [+] to expand the other contention, if needed, and enter a rework type, reason, and explanation.

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Preview the Rework Request.

When a claim processor submits the rework request, the system will display the VBA Contract Examiner that was selected on the initial scheduling request.

The document created upon submission contains a document type of ‘Exam Request’ and a subject of ‘Exam Rework’.

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This concludes Compensation Service’s introduction to Request for Clarification, Modification Request, and Rework Request in Exam Management in VBMS.

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