**Exam Scheduling Request in VBMS for Individual Unemployability Claims (Part 5)**

**Slide 1**

Welcome to the Compensation Service demonstration of Exam Scheduling Request in VBMS for Individual Unemployability Claims

**Slide 2**

Utilizing the proceeding training materials, attached job aid and available references, claim processors will be able to identify the steps required to complete an exam scheduling request in VBMS, involving a claim for individual unemployability, and complete the post-assessment with a minimum of 80% accuracy.

**Slide 3**

You may refer to the following references for more information on scheduling exam request related to individual unemployability claims. You may save a copy of the Job Aid to your desktop or personal folder for future reference.

**Slide 4**

The Exam Management System in VBMS introduces new terminology in regard to exam scheduling request involving a claim for Individual Unemployability.

Within the Contention Information tab of the exam scheduling request, a selection for **Employment Impact Assessment Requested** is used which indicates that the examiner should comment on the effect of service connected disability or disabilities on the Veteran’s ability to function in an occupational environment.

This selection is similar to the IU checkbox in Exam Request Builder.

The italicized text on this slide is the language generated in the exam scheduling request when the Employment Impact Assessment Requested is selected.

**Slide 5**

At this time, I will discuss the importance of identifying and verifying contentions and using the appropriate selections for the classification and medical fields within the **Contentions List** tab on the Claim Information bar within VBMS.

Per M21-1, Part III, Subpart III, Chapter 1, Section F, the use of contentions for each claim is mandatory.

Each issue, including non-rating issues, must be entered as a separate contention.

Remember, a claim for total disability due to individual unemployability is treated as a claim for increase in the service-connected (SC) disabilities that the Veteran identifies as causing unemployability.

Therefore, the identified SC disabilities should be entered as individual contentions.

All employees reviewing a claim are responsible for ensuring all contentions are correct and verified.

Let us watch a brief demonstration

**Slide 6 – Demonstration**

When a VA Form 21-8940 is received for a claim of Individual Unemployability, as part of an original claim for service connection or a claim for an increase or new contentions, you will establish a separate contention for unemployability and classify it as ‘Unemployability’.

You will also establish any other claimed contentions and use the appropriate medical classification.

In this example, the Veteran has filed an original claim for service connection for ischemic heart disease and a claim for Individual Unemployability due to the heart condition.

**Demonstration**

The Contentions List has been built per M21-1, Part III, Subpart III, Chapter 1, Section F.

The **CLASSIFICATION** and **MEDICAL** fields are required components when entering a contention.

For each medical contention, type the appropriate medical verbiage that corresponds to the claimed medical condition and select the appropriate classification.

In this example, the **Type** is ‘New”. **Remember**, if the contention type is ‘Increase’ or ‘routine future exam (RFE)’ to ensure that the previously rated issue is associated with the contention.

Select ‘Yes’ in the **MEDICAL** field when the medical contention requires an examination or medical opinion to make a determination.

For claim of individual unemployability (IU), type the contention of individual unemployability and select ‘Unemployability’ as the **CLASSIFICATION**.

Select ‘Yes’ in the **MEDICAL** field when the contention requires an examination or medical opinion to make a determination.

**Slide 7**

At this time, I will demonstrate how to complete an exam scheduling request when a claim for individual unemployability is received.

Let us review Scenario 1

**Slide 8 – Demonstration**

This demonstration is focused on the selection of the Employment Impact Assessment Requested option when there is a claim for individual unemployability.

For detailed information on the **Select Contentions**, **Claim Information** and **Contention Information** tabs within the **Exam Scheduling Request** screen, you can review the previous training segments and/or the current VBMS Core User Guide.

In Scenario 1, the Veteran has claimed posttraumatic stress disorder (PTSD), low back strain, right ankle strain and individual unemployability (IU) due to the PTSD and low back strain.

After you have reviewed and verified that all the contentions have been correctly classified and “YES” has been selected for the **Medical** field for the contentions that need examinations, you can move to the **Exams** chevron.

Under the **Exams** chevron; you can select the **Create New Request** button.

Under the **Select Contentions** tab, select all the medical contentions that require examinations, to include the disabilities the Veteran has identified as part of the claim for individual unemployability.

**Do not** select the ‘Unemployability’ contention. *I will discuss in the next section of this presentation when this contention is selected.*

Complete the required information in the **Claim Information** tab. This includes **Era(s) of Service** information, and whether the Veteran has any claim level **Priority Issues**, an **alternate phone number**, a **Preferred Geographic Location**, or an alternate **Power of Attorney**.

Remember, identification of an alternate phone number, power of attorney or a preferred geographic location will only apply to the current exam scheduling request and will not update the information in the Corporate Record.

I will select the **Era of Service**.

Under the **Contention Information** tab, you will expand each contention to complete the required information needed for the examination and/or medical opinion.

At this time, I will complete the information for the contention of low back strain.

For the **ACE Eligible** or **Veteran Must Report to Exam**, select the appropriate option based on whether the Veteran needs to report for examination.

Both the **ACE Eligible** and **Veteran Must Report to Exam** can be left blank.

You can also complete the **Contention Priority Issues**, if applicable to the current claim.

For the **Employment Impact Assessment Requested** option, select to enable, when the contention is part of the claim for ‘Unemployability’.

Use the **Need for Employment Impact Assessment**, if there is any specific information or evidence of record that the clinician needs to review, it should be identified here.

In Scenario 1, the evidence of record supports service connection on a direct basis, so no specialty language is needed for these contentions.

However, use the **Is Specialty Language Needed?:** for medical contentions, if medical opinions are needed, please select the appropriate opinion for the claimed contention.

Navigate to the **Available DBQs/Selected DBQs** section: Select the appropriate disability DBQ(s) under the **Available DBQs** list and advance to the **Selected DBQs** box to the right.

If you need to complete any **Special Instructions** you may do so here.

At this time, I will complete the contention information for posttraumatic stress disorder (PTSD).

Remember the posttraumatic stress disorder (PTSD) is also a part of the claim for individual unemployability (IU) and therefore I will select the **Employment Impact Assessment Requested** and all other required fields.

Finally, I will complete the contention information for the right ankle strain. Though this is part of the Veterans original claim, it is not a part of the claim for individual unemployability (IU). Therefore, I **will not** select the **Employment Impact Assessment Requested** and will complete the remaining fields.

Again, for more detailed information on the **Select Contentions**, **Claim Information** and **Contention Information** tabs within the **Exam Scheduling Request** screen, you can review the previous training segments and/or the current VBMS Core User Guide.

Select **Preview**, once each contention that needs an exam scheduling request has been completed.

A new tab will open to display the exam scheduling request.

Following your review of the exam scheduling request, you can select **Submit Request**, if there are no changes that need to be made.

If you need to make edits, prior to selecting Submit Request, you can go back through each of the tabs (Select Contentions, Claim Information, Contention Information, and Preview).

If you need to delete the request, you may do so, by selecting **Delete Request**.

Otherwise, if no changes are necessary, and you are ready to process this exam scheduling request, you may select **Submit Request**.

You will then see the **Exam Destination** dialogue box and you will select a destination for the scheduling request.

You will be asked to preview your document once more, when you have determine the exam scheduling request is ready, you may hit **Submit**.

**Slide 9**

At this time, I will demonstrate how to complete an exam scheduling request when an unemployability comment only is needed for a contention or contentions

Let us review Scenario 2

**Slide 10 – Demonstration**

This demonstration is focused on the selection of the **unemployability contention** when an unemployability comment only is needed for a contention or contentions.

For detailed information on the **Select Contentions**, **Claim Information** and **Contention Information** tabs within the **Exam Scheduling Request** screen, you can review the previous training segments and/or the current VBMS Core User Guide.

On occasion, a comment only regarding ‘Unemployability’ is needed although an examination has recently been completed (for example, a late-flowing claim prior to a rating being completed or prior to authorization).

No new exams are necessary to evaluate the severity of service connected disability(ies) associated with the claim for individual unemployability (IU), only a comment related to ‘Unemployability’ is needed.

In Scenario 2, the Veteran has filed a claim for increase of the service connected posttraumatic stress disorder (PTSD), currently at 30 percent disabling. The completed exam was received and the RVSR determines an increase evaluation to 70 percent disabling is warranted for posttraumatic stress disorder (PTSD).

However, during the pendency of the claim, the Veteran submits a VA Form 21-8940 identifying PTSD contributes to unemployability. No new exam is necessary, just a comment related to unemployability.

The contention information and classification have been reviewed and verified for the individual unemployability (IU) contention.

You can move to the **Exams** chevron.

Under the **Exams** chevron, you can select the **Create New Request** button.

Under the **Select Contentions** tab, **only** select the ‘Individual Unemployability’ contention (with the classification of ‘Unemployability’).

Complete the required information in the **Claim Information** tab, as previously discussed.

Under the **Contention Information** tab, you will expand the ‘Individual Unemployability’ contention to complete the required information.

Take note that the **Employment Impact Assessment Requested** option is selected by default, since the contention selected is classified as ‘Unemployability’.

Again, the **Need for Employment Impact Assessment** field is available, if there is any specific evidence in the record that the clinician needs to review, it should be identified here.

The **Available Unemployability Contentions** field will include active contentions that are not yet service connected and service connected issues that were identified on the VA Form 21-8940.

In this field, select the issues which have not been service connected but identified on the VA Form 21-8940 (such as in the case of an original claim or claim for new contentions) and advance these to the **Selected Unemployability Contentions**.

Under the **Available Service Connected Disabilities** section, you will identify the conditions for which the Veteran is already service connected for and that were identified on the claim for unemployability.

In this scenario, you would select the posttraumatic stress disorder (PTSD), which the Veteran is already service connected.

In this scenario, when a comment only is needed for the contention of ‘Unemployability’ skip the **Is Specialty Language Needed** filed and move on to **Available DBQs** section.

In the **Available DBQs** section, search and select the DBQ identified as, **DBQ Medical Opinion (Examiner’s Version)** and advance to the **Selected DBQs** box to the right.

If you need to complete any **Special Instructions** you may do so here.

You may now **Preview** your exam scheduling request.

Review your exam scheduling request document.

Following your review of the exam scheduling request, you can select **Submit Request**, if there are no changes that need to be made.

If you need to delete the request, you may do so, by selecting **Delete Request**.

Otherwise, if no changes are necessary, and you are ready to process this exam scheduling request, you may select **Submit Request**.

You will then see the **Exam Destination** dialogue box and you will select a destination for the exam scheduling request.

You will be asked to preview your document once more, when you have determined the exam scheduling request is ready, you may hit **Submit**.

**Slide 11**

This concludes the Compensation Service demonstration of Exam Scheduling Request in VBMS for Individual Unemployability Claims.

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