For Training Purposes Only
Training Coordinator's Module Guide for Evaluate a Disability Based on a Routine Future Examination

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For Training Purposes Only

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Section I - Introduction

Introduction

Welcome to the *Evaluate a Disability Based on a Routine Future Examination* Basic Ratings Module of the Training and Performance Support System. Please read this Module Guide in its entirety. Feel free to highlight certain portions or write down notes as you read through this document.

Within these pages, you will find the information you need to set up and implement this course successfully.

Section I provides you with a complete list of course materials.

Section II includes an introduction to this module, including a Module Overview and Module Map; student evaluation; and a list of specific resources required to support this training module. This Module Guide also includes answer keys and worksheets for all lesson practice exercises. This guide will help you prepare for and schedule this training.

Section III contains the Module Master Planning Chart, which lays out instructional activities and course events, including time and resource requirements.

Section IV contains a Module Summary for you to review with the students before they begin the Lesson Posttest.

Remember: To evaluate student performance and answer any student questions, you must either:

(1) Be thoroughly familiar with the task - Evaluate a Disability Based on a Routine Future Examination, or

(2) Identify the Subject Matter Expert (SME) to whom you may refer any specific technical or task-related questions. Ensure this person is available to provide any one-on-one training and/or feedback if necessary.

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Module Overview	This module is entitled *Evaluate a Disability Based on a Routine Future Examination*. This module is part of the Basic Ratings Course. It contains the following four custom-designed, computer-based topics with several off-line, case-based interactive training exercises: **Topic 1** - Verify Requirements for Rating **Topic 2** - Determine Level of Disability and Action Required **Topic 3** - Protective Provisions **Topic 4** - Formalize the Rating
Who Will Take This Module?	The target population for this module consists of rating personnel with some experience rating original Compensation and Pension cases. Students who take this module should have either failed the Evaluate a Disability Based on a Routine Future Examination Module Pretest or opted not to take the pretest. **Note:** The pretest is optional. Students who want to take the Routine Future Examination Module may choose to take the pretest, or may choose to go directly to the lessons. All students selected to take this module should take each topic in sequence to ensure that he/she has (or gains) a comprehensive understanding of evaluating a disability based on a routine future examination, from start to finish.
TPSS Materials	Everything that your students need to complete the Evaluate a Disability Based on a Routine Future Examination Module is available to them within the module online. Once you provide the students with a proper briefing, your role, other than monitoring their progress throughout and conducting test briefings, will be to score the test answer sheets that they print from the system and give them feedback. You can access the test scoring instructions and answer keys from the VBA Learning Catalog, where you found this Module Guide. Search for TMS Item #1380387.

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TPSS Equipment

Dual Monitors

The computers for the students should be set up with dual monitors so that they can open the online cases and look at other reference material during the training and testing. In the Module Introduction, the students are provided with the following information about opening instructional cases with or without dual monitors:

"As you work your way through the lessons, you will use online cases that are based on actual Veterans' cases which have been altered for training purposes and to protect the privacy of the individuals involved with the claim.

You will access these online cases by clicking the Cases button in the upper part of the screen.

- If you have dual monitors, when you select a case using the button, it will open in a new window. You may move it to the other monitor and expand it to fit the entire screen.
- If you do not have dual monitors, when you select a case using the button, it will open in a new window, and you must toggle between the case and the courseware.

Note: The cases have bookmarks for each form, letter, etc., within the case. You may select a bookmark to advance to that document within the case. Or you may scroll up and down throughout the case by using the scrollbar on the right-hand side of the window.

Throughout this module, you will be prompted when to open a given case and when to close it. You may want to reinforce this information during your briefing and make sure when they come to their first online case, they understand what to do with it.
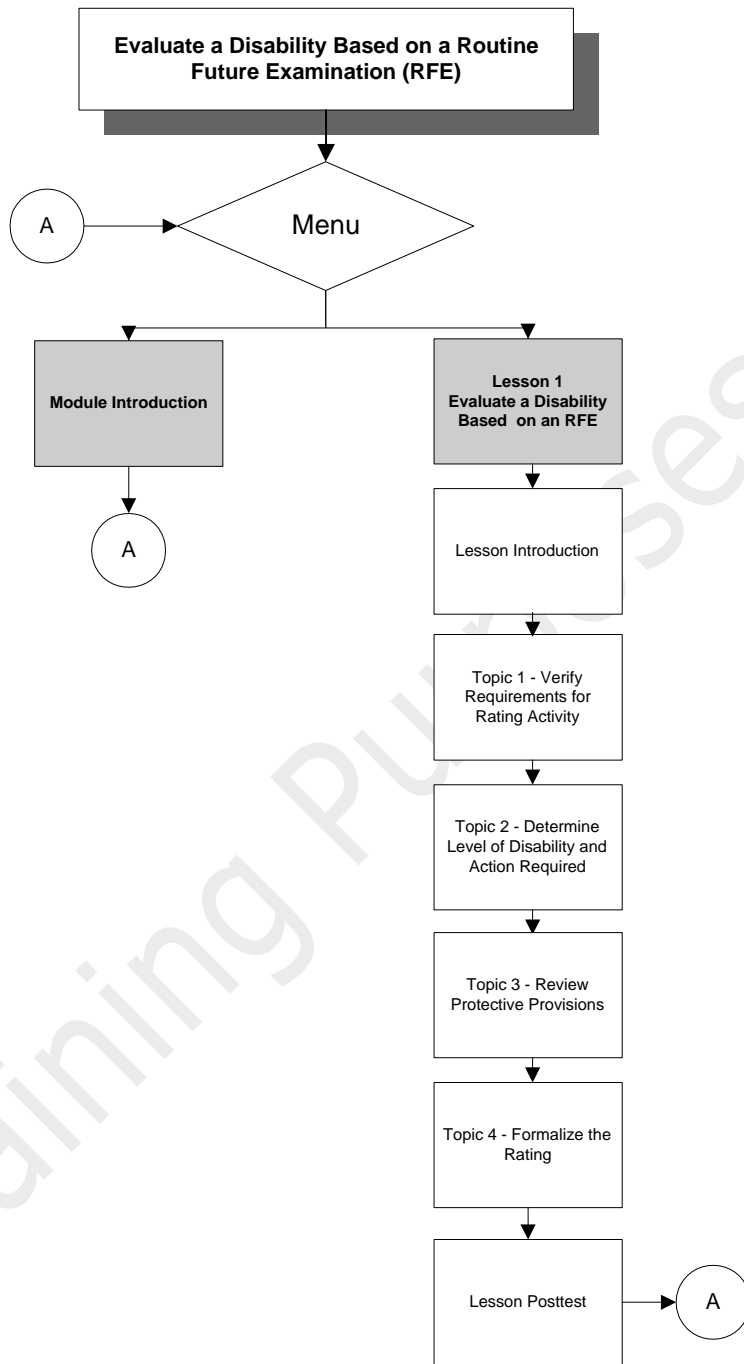
Module Map

To get an overview of how the module is laid out, take a look at the Module Map that follows.

As you can see, the Routine Future Exam Module is comprised of one lesson. The students must take the topics in the order that they are presented.
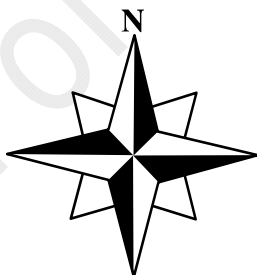
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Evaluate a Disability Based on a Routine Future Examination (RFE)

Menu

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Module Introduction

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**Lesson 1
Evaluate a Disability Based on an RFE**

Lesson Introduction

Topic 1 - Verify Requirements for Rating Activity

Topic 2 - Determine Level of Disability and Action Required

Topic 3 - Review Protective Provisions

Topic 4 - Formalize the Rating

Lesson Posttest

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RFE Test Design

The RFE module pretest and lesson posttest each consists of three cases that the student must review and then rate (final, proposed, or deferred).

If they determine a case requires additional development, they will prepare a deferred rating decision using a copy of a Deferred Rating Decision Form (21-6789), and if necessary, a C&P Exam Request Form. Both of these are available from Rating Tools under the Tools button within the module online.

However, if they determine the case is ready to rate, they will prepare a rating decision and code sheet using the Compensation Rating Template and the TPSS Rating Text, which are also available from Rating Tools under the Tools button. Students will prepare rating decisions using the Compensation Rating Template to show they can perform the task.

Compensation Rating Template and TPSS Rating Text

The Compensation Rating Template is an electronic file that is formatted to look like a rating decision. It has fields in which students must enter specific information about the claim. Students are to complete the Compensation Rating Template by typing in the necessary information for each field after they have reviewed and evaluated the case.

Students will use the TPSS Rating Text to copy and paste the appropriate wording for each issue into the Reasons for Decision section of the Rating Template. Both the Compensation Rating Template and the TPSS Rating Text are available from Rating Tools under the Tools button within the module.

Students must demonstrate they can perform the task of preparing a rating decision for a new claim for disability pension—they just won't be using RBA2000 to do it. **It will be up to the Stations to provide training after TPSS to teach and practice actual generation of the rating document using RBA2000.**

Be sure to collect ALL completed rating decisions (both paper-based and electronic) from the students after discussion.

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Module Pretest

There are three cases in the module pretest. Training candidates have the option not to take the module pretest.

As stated in the answer key, a test-taker must pass two out of three cases, to pass the module pretest. The passing criteria for the module pretest are provided in the test directions/answer keys which can be accessed in the VBA Learning Catalog. Search for TMS Item #1380387.

The cases in the module pretest are designed to assess the student's ability to perform the process of evaluating a disability based on a routine future examination at the Basic Ratings level. Test-takers should assume that the adjudication process is complete and the case is ready to rate.

While you do need to administer the module pretest, you do not need to enter the test scores. After you score the test answer sheets and provide feedback to the students, you will email the test scores to the TPSS Help Desk (CDSHelpDesk@vba.va.gov). You can email the scores for multiple students at the same time. The email must include the following information for each student: student's TMS student identifier/TMS user name, module name, test name, test score of P or F, and test date.

Lesson Posttest

Once students complete the lesson, they will be prompted by the computer to take the lesson posttest. There are two available variants of the lesson posttest. When administering the lesson posttest you will assign test variants to the students. Instruct the students to take Variant 1 first and then Variant 2, if needed. If a student does not pass a lesson posttest, then the student must take that lesson posttest's variant.

> **Note**: Your Training Coordinator's Guide offers tips and guidelines for providing test feedback, and prescribing remediation.

The lesson posttest is designed to test the material specifically covered in the Routine Future Examination Module.

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For the most part, instructions for the lesson posttests contain an Assumptions and Conditions section which informs the student of characteristics inherent to the cases used in the testing environment.

The passing criteria vary for each part of the lesson posttest. Refer to the test scoring instructions/answer keys for more information. You can access the test scoring instructions and answer keys from the VBA Learning Catalog. Search for TMS Item #1380387.

Important: While you do need to administer the lesson test, you do not need to enter the lesson test scores.

Module Posttest

There is no module posttest at the end of this module. In order to pass the Routine Future Examination Module, the students must pass the Lesson Posttest.

Publications
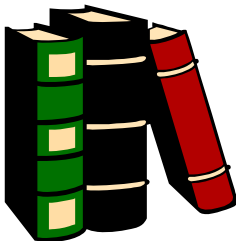
Ensure that students have access to Future Exam-relevant reference materials, such as:
· M21-1MR, Parts III and VI
· 38 Code of Federal Regulations (38 CFR)
· Rating Schedule
· U.S. Court of Appeals for Veterans Claims documentation
· VBA Circulars
· "Fast Letters"
· Training Letters
· Policy Letters
· Regional Office Procedures
· Merck Manual
· Dorland's Illustrated Medical Dictionary
· Diagnostic and Statistical Manual of Mental Disorders IV
· Rating Activity Medical Members (where available)
· U.S. Court of Appeals for Veterans Claims Hotline
· Automated Reference Materials System (ARMS)
· Beneficiary Index and Relocator System (BIRLS)

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To report problems with the computer courseware:

1st ·   Contact your local IRM support.

If your local IRM support is not available or does not know how to troubleshoot the problem,

2nd ·   Contact the VBA TPSS **Help Desk!**

Email: CDSHelpDesk@vba.va.gov

3rd ·   Connect to the Intranet

Access the comments database web form, go to the Compensation Service Home Page (http://cptraining.vba.va.gov). From here, select the training button, then the TPSS button. On the page that appears, select the comments feedback form.

Section II - Module Master Planning Chart
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Section II - Module Master Planning Chart

The Module Master Planning Chart is designed to provide you with the information you need to effectively plan the scheduling and resource requirements for this module.

Section II - Module Master Planning Chart
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Evaluate a Disability Based on a Routine Future Exam

Note: The estimated range of time required to complete the online content, including cooperative exercises and a single version of the Lesson Posttest, is 5 hours, 30 minutes to 9 hours.

This Module Master Planning Chart is based on the average time that students required during the validation of this module. Be aware that the actual times for students may be more or less than the time listed here.

- Estimated total Student time for online course and a single version of the Lesson Posttest: **7 hours, 15 minutes**

- Estimated total Student time for Module (aka, total "seat" time): **8 hours, 15 minutes**
  (**Note:** All estimated total "seat" times for modules include module orientation, the online courseware and cooperative exercises, if applicable, along with a single variant of the Lesson Posttest and feedback.)

- Estimated total Training Coordinator Time for administrative duties: **3 hours**
  (**Note:** This total includes the additional time required by the TC to perform briefings, feedback, and any administrative duties such as grading tests and emailing TPSS Help Desk, i.e., those shaded line items that are specifically TC times only. Total time accounts for administration of a single variant of the Lesson Posttest. Module Pretest preparation and grading is not included in the total. The TC does not have to be present for the entire time the students are working in a lesson or taking a test. The TC may be working with other students or even performing other duties while students are working in TPSS. The TC needs to be available to answer questions as needed. That time will vary depending on how familiar with TPSS the students are.)

Section II - Module Master Planning Chart
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Duration		Activity	Notes/Tips
Hrs	**Min**		
	10	**Module Pretest Preparation**	Includes giving student access to the Evaluate a Disability Based on a Routine Future Examination Module in TMS.
4	00	**Module Pretest**	Conducted sometime prior to Day 1 of the training.
1	00	**Module Pretest Grading**	Scoring instructions and answer keys can be accessed in the VBA Learning Catalog.
	30	**Administrative Functions**	Includes emailing TPSS Help Desk with Module Pretest results, if applicable, assigning student privileges, notifying students of course schedule, and preparing a briefing.
	30	**Orientation/Briefing**	Includes setting up students with workstation and required materials. Ensure students understand logging into the course on the computer, understand how to navigate through the course using the buttons and prompts, and understand what on-line "Tools" are available to help.
	15	**Module Introduction**	Students read the module objective. Students are introduced to lessons contained in the module.
3	00	**Lesson 1**	• Introduction – Students will read lesson objective(s) • Topic 1 – Evaluate a Disability Based on a Routine Future Exam **First Cooperative Exercise** - Students will review the claims folders for **Ronald F. Stout** and **Eric F. Morenas** to determine if the claims are ready for rating activity. • Topic 2 – Determine Level of Disability and Action Required **Second Cooperative Exercise** - Students will review the claims folders for **Jay F. Moritz** and **Eric F. Morenas** to determine the current level of disability and the appropriate action for each case. • Topic 3 – Review Protective Provisions • Topic 4 – Prepare the Rating Decision **Third Cooperative Exercise -** Students will prepare a rating decision using the Compensation Rating Template and the claims folder for **Eric F. Morenas, and Jake F. Hunter**.

Section II - Module Master Planning Chart
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Duration		Activity	Notes/Tips
Hrs	**Min**		
	15	**Lesson 1 Posttest Variant 1 Briefing**	Includes reviewing results of any cooperative exercises and ensuring that students are ready to take the test. Includes assigning a test variant to each student.
4	**00**	**Lesson 1 Posttest Variant 1**	Students access the test online and turn in any printed documents to the TC for scoring.
1	**00**	**Lesson 1 Posttest Variant 1 Grading**	Scoring instructions and answer keys can be accessed in the VBA Learning Catalog.
	15	**Lesson 1 Posttest Variant 1 Feedback**	Feedback times will vary depending on the number of items a student missed. If a student fails the Lesson Posttest, you must provide remediation until the student feels confident enough to take a variant of the Lesson Posttest. At that time, you will administer the variant in the same way you administered the Lesson Posttest and provide feedback based on the student's results of the variant.
	15	**Lesson 1 Posttest Variant 2 Briefing**	Includes reviewing results of any cooperative exercises and ensuring that students are ready to take the test. Includes assigning a test variant to each student
4	**00**	**Lesson 1 Posttest Variant 2 (if necessary)**	Students access the test online and turn in any printed documents to the TC for scoring.
1	**00**	**Lesson 1 Posttest Variant 2 Grading**	Scoring instructions and answer keys can be accessed in the VBA Learning Catalog.
	15	**Lesson 1 Posttest Variant 2 Feedback**	Feedback times will vary depending on the number of items a student missed. If a student fails the variant of the Lesson Posttest, you must provide remediation until the student can demonstrate proficiency in the task. Make arrangements to provide additional assistance to any students who failed the second version of the Lesson Posttest before they receive a certificate.

Notes:

1) There are no Module Posttests for the *Evaluate a Disability Based on a Routine Future Examination* TPSS module.

Section III - Module Summary
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Section III - Module Summary

Training Coordinator Notes:

After all students have completed Lesson 1, review the entire module by reading the following summary (or your own personalized version). Respond to any questions from the students before continuing with the Lesson 1 Posttest.

After you have presented the module review, if a student does not feel ready to continue to the final posttest, allow him or her some time to review those topics or issues before administering the Lesson 1 Posttest.

Tell students:

"*Now that you have completed the lesson in this module, you should find it easier to understand the process of evaluating a disability based on a routine future examination. There are important details in the course of the evaluation process, and no detail, regardless of how insignificant it may seem on the surface, can be overlooked. This practice is mandated by law in the duty to assist doctrine.*"

Section III - Module Summary
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**Topic 1
Verify
Requirements for
Rating Activity**

Future exams or reexaminations are ordered when the VA determines that a disability has improved, when evidence indicates that there has been a material change in a disability, or when the current rating may be incorrect.

If you follow the steps as outlined in Topic 1, you can be assured of implementing the necessary tasks in order to verify requirements for rating activity.

The first step in rating a disability based on a routine future examination is to make sure the correct folder accompanies the claim. That is, make sure the Veteran's name and file number match on all documents in the file.

Review all previous rating decisions and evidence of record when evaluating a disability based on a routine future examination. Then thoroughly evaluate all new medical and other evidence.

Next, determine if the reexamination is adequate. If an exam is inadequate, the rating activity should request a reexamination.

Finally, once all medical and nonmedical evidence contained in the claims folder has been reviewed, you must determine as to whether the evidence is sufficient for rating. You might need to request a specialist examination or other types of evidence if there is insufficient medical or other evidence for rating the case.

**Topic 2
Determine Action
Required**

After you determine the level of disability, you can determine the action required. If you determine that there is no change in the disability, you must formalize a rating to confirm and continue. If there has been a change in disability, the VA must verify the severity of the disability through a routine future examination. A rating decision to either increase or reduce benefits must be prepared when there is a change in disability.

Once you determined that a future examination is required, keep in mind that the date of the future exam review should be based on the facts and circumstances of each case.

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**Topic 3
Protective
Provisions**

After you determine that, based on the results of other evidence, there has been improvement in the Veteran's condition and that benefits should be decreased, there are certain protective provisions, which must be reviewed.

Protective provisions, detailed in 38 CFR, have been created to protect Veteran's benefits from reduction. Veteran's benefits can be protected from reduction even when examinations and/or other evidence indicate improvement in the Veteran's condition.

Certain sections of 38 CFR can be invoked after a Veteran has been rated at a certain level and has continuously received benefits for 5, 10, or 20 years.

If a disability evaluation has been in effect for at least five years, that benefit cannot be reduced based on only one examination.

The benefits of a combined evaluation that has been in effect for 20 years or more cannot be reduced. Also, a total disability rating, either scheduler or based on individual unemployability which has been in effect for 20 years or more, cannot be reduced. Lastly, a rating of permanent and total disability for pension purposed which has been in force for 20 or more years will not be reduced.

If a rating has been in effect for 5 or 10 years and evidence indicates improvement, you must prepare a confirmed and continued rating and review other accumulated evidence or set up another future exam. If the future exam shows sustained improvement, you must prepare a proposal to reduce. When a rating has been in effect for 20 or more years and you receive evidence-indicating improvement, you would automatically prepare a confirmed and continued rating.

Due Process provisions specify that the VA must notify the Veteran once the decision to reduce has been made. The Veteran has a 60-day period in which to submit evidence for the purpose of showing that the adverse action should not be taken. After the 60-day period has elapsed, you should prepare the final rating action, in absence of evidence otherwise.

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Topic 4
Formalize the
Rating

All ratings must contain the issues reviewed, evidence reviewed, complete rationale for the decision, and a conclusion to include supporting data.

A complete rationale for all issues and decisions made must be provided while rating the claim. Diagnostic codes for each disability listed as an issue, individual percentage evaluations for each disability, and combined evaluations must also be included.