#### Creating and submitting Examination Scheduling Requests, Utilizing New EMS Functionality and Splitting Examinations between VHA and Vendors

#### **TOPIC 1: Creating Exam Scheduling Request (ESR)**

**Step 1:** Click the exam chevron. Once the exam chevron is selected the "Create New Request" box will appear. Select this box.

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Prior to ordering an examination through the Exam Management System (EMS), the user must ensure that the contention(s) that will be included on the Examination Scheduling Request (ESR) is correctly identified in the contention development tab. It is essential that the user has the correct options selected in the drop downs as this directly affects the ability to create and request an ESR.

**Note:** Any section marked with a red asterisk is a required field and must be filled out to move forward building the ESR.



**Step 2:** Select the box next to the contention(s) to be included on the ESR. The line under the Claim Information button will turn green, and you may click "Claim Information" to proceed.

If the system does not allow you to select a contention, this means that there is an error in the way the data or attributes for the contention were entered. The user must return to the contention field and revise as needed.

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Step 3: Identify, if applicable, any Veteran priority issues.

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**Step 4:** Verify Veteran's address. If an alternate address is needed or the Veteran has temporarily relocated, use the "Preferred Geographic Location", to enter a temporary address.

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- a. User has the option to select whether the contention is ACE eligible, Veteran must report to exam or Employment Impact Assessment is requested.
- b. If a Medical Opinion (MO) or specialty language is needed, the user must select the appropriate opinion or examination verbiage. If not done, the system automatically populates standard language based on the contention type, contention classification, and DBQ selection.
- c. User must select any appropriate contention level priority issues, such as 1151.



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- d. Depending on the specialty language chosen users must ensure that red asterisk fields are populated accordingly, and the tabbed evidence is noted in the "Tabbed Evidence" description field.
- e. The "Other" specialty instruction option provides the user a blank field in case a new MO type is needed that is not currently available in the Specialty language drop down.

Note: If additional specialty language is needed, use the drop-down menu.

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**Step 5**: Next, the user will select a corresponding DBQ based on the contention(s). The User can select from the full list below, or type in a keyword search based on the DBQ needed. EMS will highlight the recommended DBQ based on the contention classification chosen for that contention.

After selecting the DBQ in the 'Available DBQs' section, select the arrow to move it into the 'Selected DBQs' section:



**Note:** If a medical opinion is required and the DBQ does not have the opinion language embedded in it, you must always select 'DBQ Medical Opinion (Examiner's Version)' **in addition** to the DBQ selected for the contention.

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* To add a DBQ, select a DBQ from the DBQ(s) list and move it to the	Selected DBQ(s) list usir	ng the buttons provided.	
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**Step 6.** Next click 'Preview' from the Exam subcategories list. This will generate a PDF version of the ESR. This PDF contains all the information that will be provided to the vendor/VHA. Review the PDF and ensure that all necessary information is included and that it is correct. Then close the PDF. If any information needs to be amended, you can go back and make any needed corrections, as necessary. You can now click 'Submit Request'.

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Step 7. User will be presented with the recommended destination (VHA CAPRI or a vendor).



#### TOPIC 2: All ESR's sent to either VHA or a Vendor

**Step 1:** Review ERRA to determine if any DBQs can be completed by the VHA facility nearest the Veterans location only. Be sure to review the "Routing Location Comments" and "Exam Type Comments" to ensure a needed DBQ has not been disabled by the VAMC.

If VHA is not able to complete any of the needed DBQ's, using EMS complete the ESR as described above and submit to the recommended vendor populated in EMS.

• Users must select what is recommended by EMS unless circumstances require choosing an alternate vendor or VHA for Contract Exam Exclusions (M21-1 IV.i.2.A.j).

**Step 2:** If VHA can complete all needed DBQ's, using EMS, build the ESR as described above. User will preview the ESR, check for accuracy and completeness and then select "Submit". After selecting "Submit", the User will be presented with the "Exam Destination" selection.

Exam Destination	
Recommended Vendor Destination:	View Alternate Destinations
Alternate Choices:	
O LHI	
O QTC	
O VES	
Exclusions:	
ExcludedVendor was excluded because Veteran is Pregnant.	
Cancel Generate CAPRI Data	

Step 3: If the recommended destination confirms VHA CAPRI, select "Generate CAPRI Data".



If "VHA CAPRI" is not the recommended destination, select "View Alternate Destinations" and select "VHA CAPRI: as the alternate destination. The appropriate justification must also be selected prior to continuing.

- Select "Other" if selection is based on ERRA results.
- Enter "Based on ERRA instructions" for the required free text.

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1	Alternate Choices:
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1	VHA CAPRI
	Justification:
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ľ	Road/driving conditions and concerns for the Claimant
I	Addendum requests for an exam completed at the VAMC
н	Routed to VHA due to contract Exam exclusion as defined in M21-1 III.iv.3.A.
I	Mataran profess MLA
	Veteran prefers VHA Conflict of interest - Claimant is VBA Vendor employee



**Step 4:** After clicking "Generate Capri Data," a new screen will display the CAPRI worksheet for review.

Veteran Name: KAKASHI HATAKE SSN Claim Number: 600243771
Date of claim: 0630 2021
Attention C&P clinical staff - Veteran Prefers VHA Explanation: TEST
The Veteran will need to report for the following exam(s) unless the ACE process is utilized. Clinician: If using the ACE process to complete the DBQ, please explain the basis for the decision not to examine the Veteran, and identify the specific materials review complete the DBQ. Also if the exam is completed using ACE, please review the Veteran's claims folder and indicate so in the exam report.
DBQ PSYCH PTSD Initial
The following contentions need to be examined:
PTSD Classification: Post Traumatic Stress Disorder (PTSD) Combat - Mental Disorders Type: NEW
Standard Language Output Text: The Veteran is claiming service connection for PTSD. Please examine the Veteran for a charonic disability related to his or her claimed condition and indicate the current level of severity.
If more than one mental disorder is diagnosed please comment on their relationship to one another and, if possible, please state which symptoms are attributed to each disorder. PTSD is claimed due to the following stressor(s): test
The Veteran has claimed PTSD due to a specific stressful event. Confirmation is required to establish if a relationship exists between the claimed stressor and any mental health diagnosis.
For this Contention, VBMS expects a results package to at minimum include data pertaining to the following DBQ(s):
DBQ PSYCH PTSD Initial
Please direct any questions regarding this request to:
Phone number: Email:

**Step 5:** Once the worksheet is generated, users must copy the CAPRI worksheet and paste it into the CAPRI system for the VAMC location nearest the Veterans home shown in ERRA.

**Step 6:** After the request has been entered into the CAPRI system, users will select "Certify CAPRI Submission" in EMS. By selecting this, the user certifies they entered the exam request in the CAPRI system. Once the user certifies CAPRI submission, changes cannot be made to the ESR.



**Note:** User must upload a copy of the "2507 Request" created in the CAPRI system to the VBMS E-folder.

The CAPRI worksheet generated in EMS is not transmitted to VHA and is not saved in VBMS.



**Step 7:** Upon certifying CAPRI submission, users should verify that the correct 'Tracked Items' were created and that the claim suspense updated appropriately. **Please note**: These tracked items must be manually updated.

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DBQ PSYCH PTSD Initial		07/09/2021		08/08/2	021				
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After the ESR has been certified, the ESR information will displayed under the exam chevron. The status will indicate "Submitted in CAPRI" and "VHA CAPRI" will be shown as the destination.

Contentions List Development Letters Tracked Items Exams Claim Notes Deferrals Record Research Requests											
Exam Scheduling Request Summary								*			
Showing 1 - 1 of 1											
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**Note:** Appointment and Exams status for VHA CAPRI exams will be found in the CAPRI system. The ESR status for VHA CAPRI submissions will not change regardless of DBQ upload. VHA ESRs submitted in CAPRI cannot be edited or canceled in EMS. All changes must be done in the CAPRI system.

**TOPIC 3: Splitting Exam Scheduling Request (ESR) between VHA and Vendor (when required)** 

Step 1: Review ERRA.

**Step 2:** If ERRA indicates VHA can complete one or more DBQ's, but not all the needed DBQ's; follow the steps outlined in TOPIC 1 to create and preview the ESR that will be submitted to a vendor. Then follow the steps for submitting the ESR to the recommended vendor shown in TOPIC 2.



The vendor ESR must be completed and submitted first when splitting examination requests. Doing so locks the contentions on the vendor ESR so they cannot be request on the VHA ESR as well. It also allows VHA CAPRI to populate as the recommended destination when creating and routing the VHA ESR.

**Step 3:** After vendor ESR has been submitted, select the contention(s) for VHA CAPRI and create a second ESR as outlined in TOPIC 1.

**Step 4:** Follow guidance outlined in TOPIC 2 for submission of the CAPRI worksheet into the CAPRI system.

