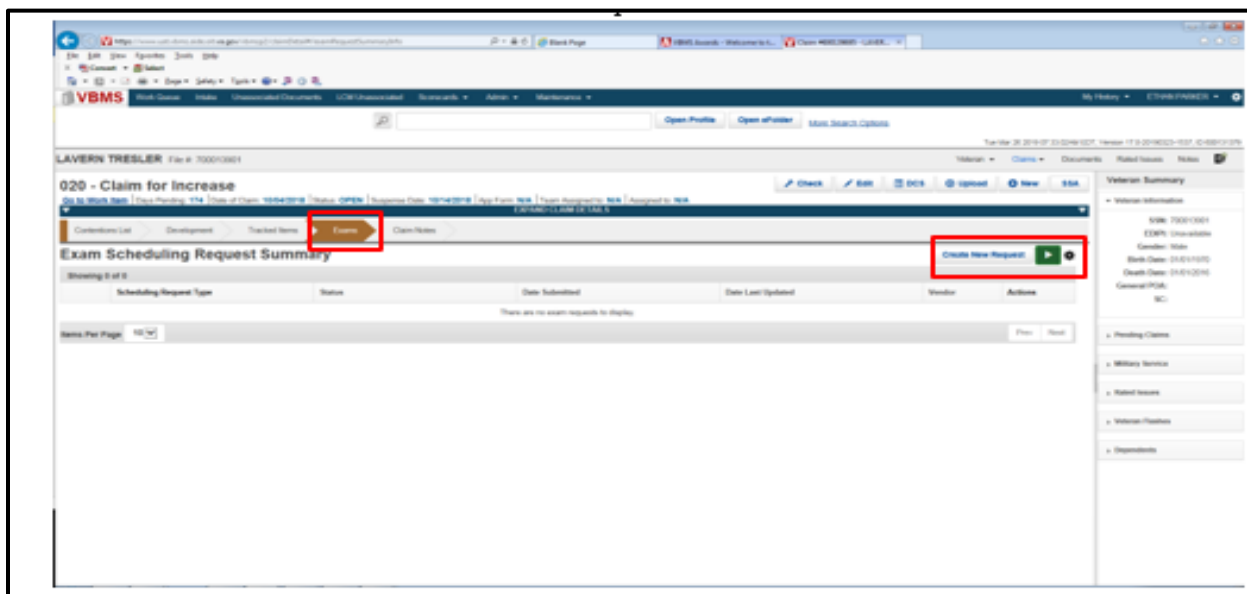


EXAM MANAGEMENT SYSTEM JOB AID

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.



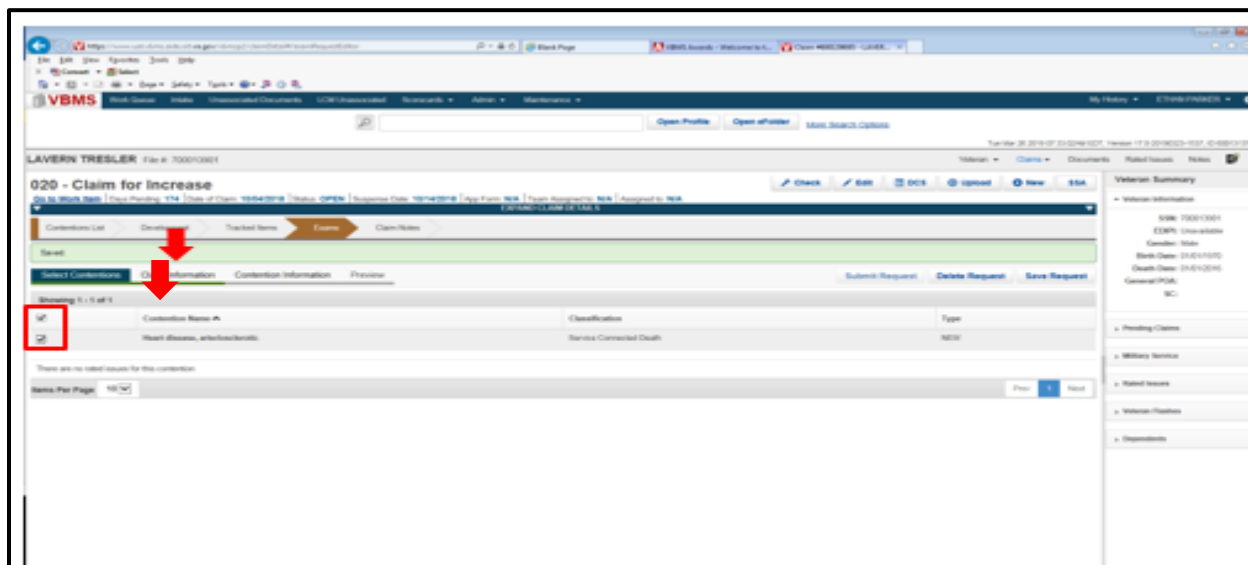
Prior to ordering an examination through the Exam Management System (EMS), the user must ensure that the contention(s) that will be included on the Examination Scheduling Request (ESR) is correctly identified in the contention development tab. It is essential that the user has the correct options selected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

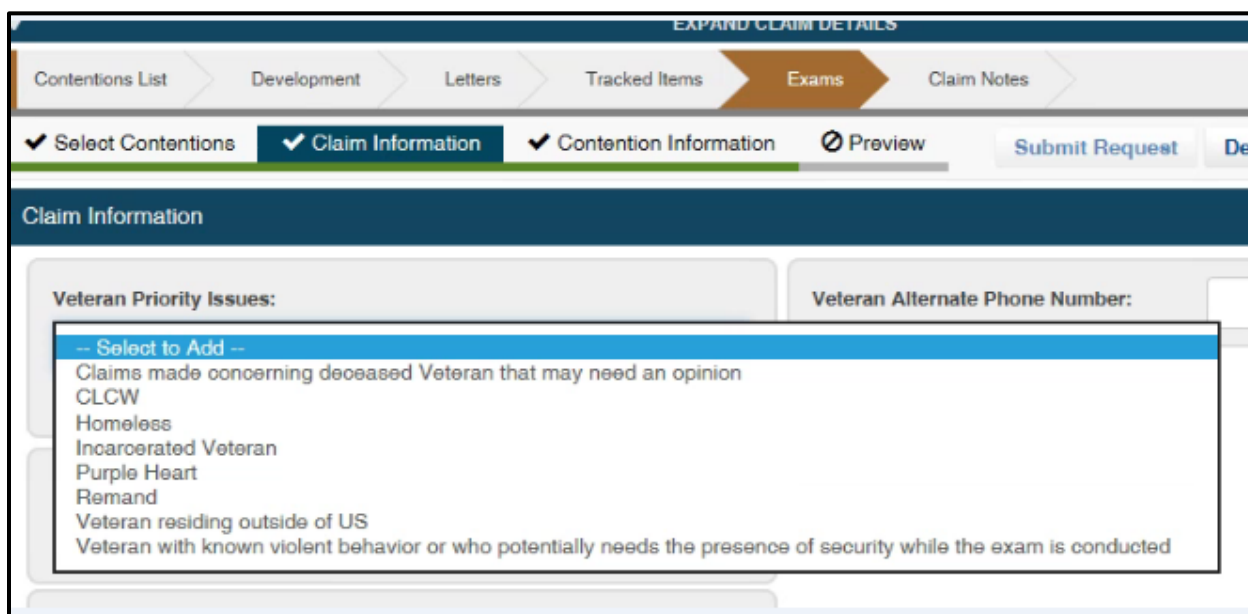
EXAM MANAGEMENT SYSTEM JOB AID

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.



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



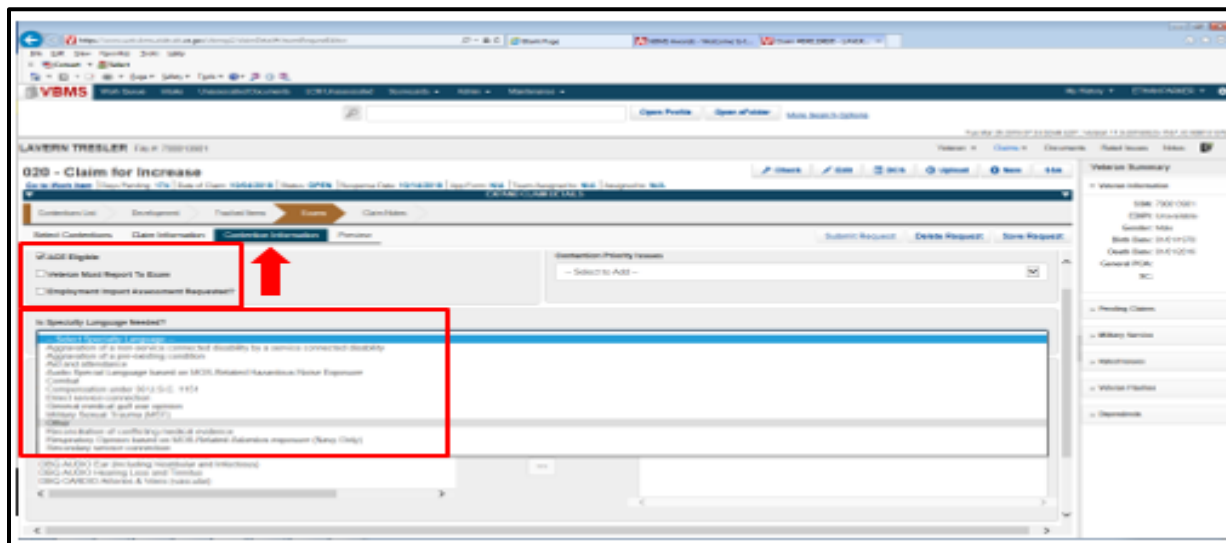
EXAM MANAGEMENT SYSTEM JOB AID

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.

The screenshot displays the VBMS (Veterans Benefits Management System) interface for a 'Claim for Increase' for LAYERN TRESLER. The form is divided into several sections. A red box highlights the 'Missing Address of Veteran' section, which includes the option 'Use the Veteran's Preferred Geographic Location'. Below this, a section titled 'Does the Veteran have a Preferred Geographic Location?' is shown, with the 'Yes' radio button selected. Under 'Yes', there are three radio buttons: 'Domestic', 'International', and 'Military'. Below these are input fields for 'Address Line 1', 'Address Line 2', 'Address Line 3', 'City', 'State', and 'Zip Code'.

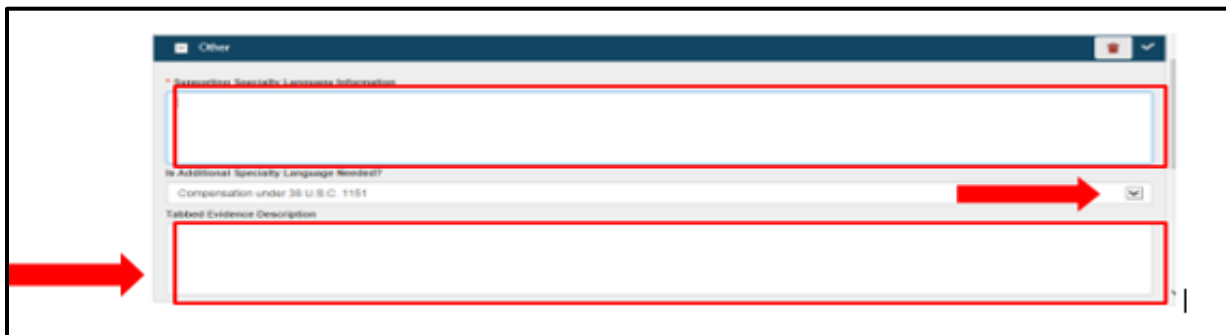
- User has the option to select whether the contention is ACE eligible, Veteran must report to exam or Employment Impact Assessment is requested.
- If a Medical Opinion (MO) or specialty language is needed, the user must select the appropriate opinion or examination verbiage. If not done, the system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

EXAM MANAGEMENT SYSTEM JOB AID



- 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.



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:

EXAM MANAGEMENT SYSTEM JOB AID

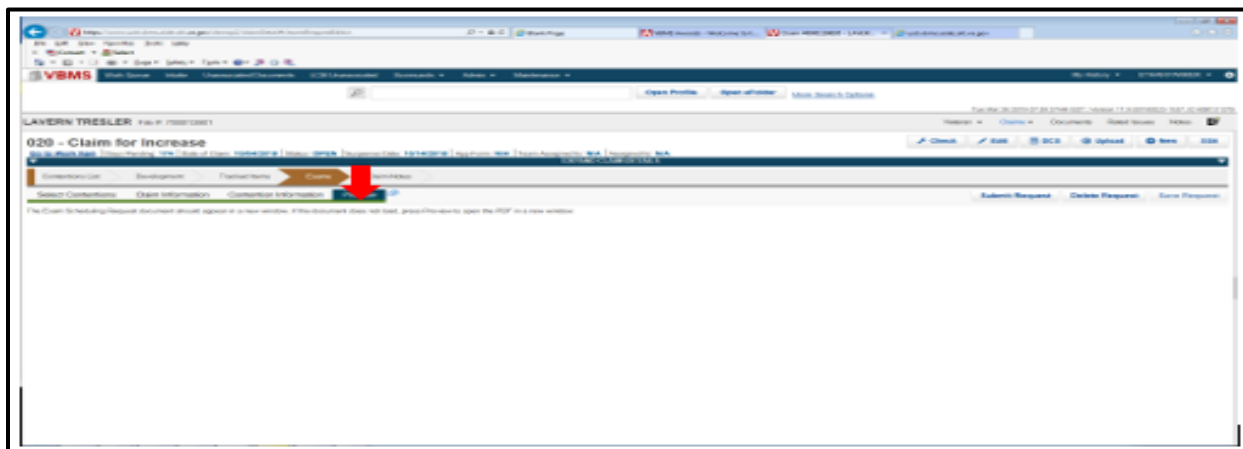
Note: If a medical opinion is required and the DBQ does not have the opinion language embedded in it, you must always select 'DBQ Medical Opinion (Examiner's Version)' **in addition** to the DBQ selected for the contention.

The screenshot shows the 'Exam Management System' interface. The top navigation bar includes 'Contentions List', 'Development', 'Letters', 'Tracked Items', 'Exams', 'Claim Notes', and 'Deferrals'. The 'Exams' tab is active. Below the navigation bar, there are tabs for 'Select Contentions', 'Claim Information', 'Contention Information', and 'Preview'. The 'Contention Information' tab is selected. On the right side, there are buttons for 'Submit Request', 'Delete Request', and 'Save Request'. The main content area contains a note: '* To add a DBQ, select a DBQ from the DBQ(s) list and move it to the Selected DBQ(s) list using the buttons provided.' Below this note, there are two columns: 'Available DBQs' and 'Selected DBQs'. The 'Available DBQs' column has a filter box and a list of options. The 'Selected DBQs' column has a filter box and is currently empty. A red arrow points to the 'DBQ Medical Opinion (Examiner's Version)' option in the 'Available DBQs' list.

The screenshot shows the same 'Exam Management System' interface. The 'Contention Information' tab is selected. The 'Selected DBQs' list now contains the 'DBQ Medical Opinion (Examiner's Version)' option. A red box highlights the instruction text: '* To add a DBQ, select a DBQ from the DBQ(s) list and move it to the Selected DBQ(s) list using the buttons provided.'

EXAM MANAGEMENT SYSTEM JOB AID

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'.



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

EXAM MANAGEMENT SYSTEM JOB AID

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:

VHA CAPRI

[View Alternate Destinations](#)

Alternate Choices:


LHI

QTC

VES

Exclusions:

ExcludedVendor was excluded because Veteran is Pregnant.



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

EXAM MANAGEMENT SYSTEM JOB AID

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.

Exam Destination

Recommended Vendor Destination:
 QTC

Alternate Choices:
 VES

LHI
 VHA CAPRI

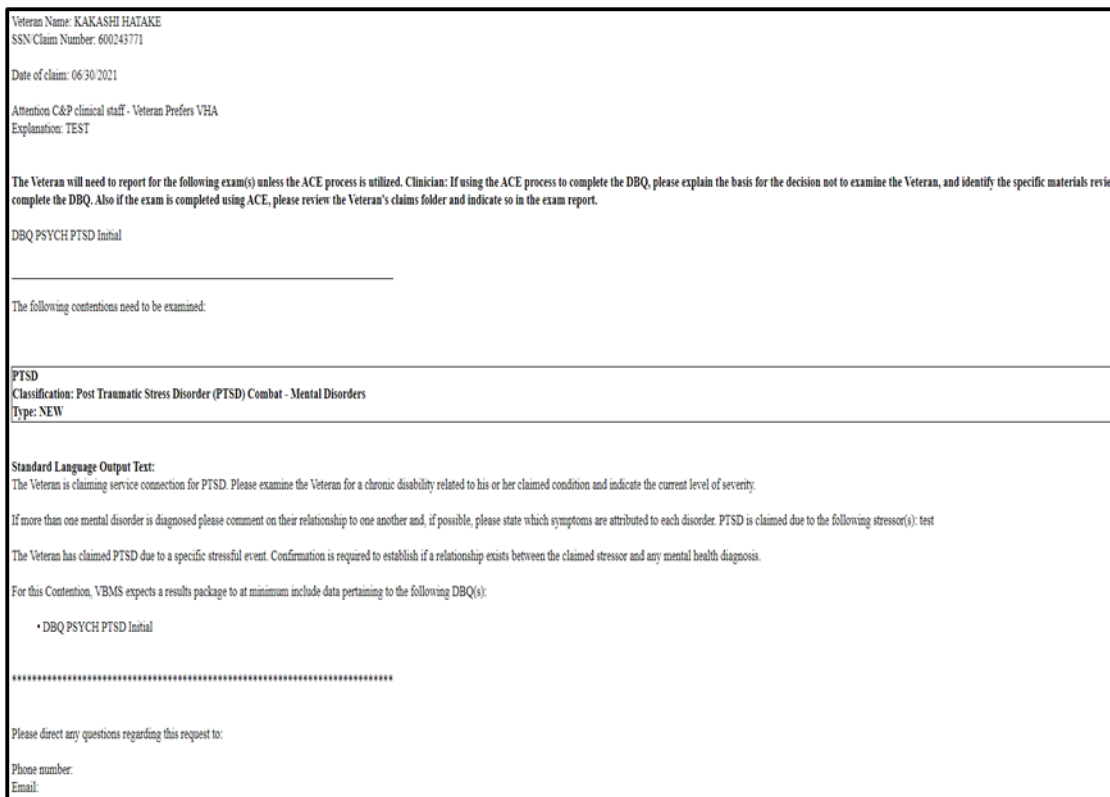
* Justification:
[Dropdown menu]

Road/driving conditions and concerns for the Claimant
Addendum requests for an exam completed at the VAMC
Routed to VHA due to contract Exam exclusion as defined in M21-1 III.iv.3.A.1.j
Veteran prefers VHA
Conflict of interest - Claimant is VBA Vendor employee
Other

Cancel Generate CAPRI Data ← mission

EXAM MANAGEMENT SYSTEM JOB AID

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



The screenshot shows a CAPRI worksheet for a veteran named KAKASHI HATAKE. The form includes fields for Veteran Name, SSN Claim Number, Date of claim, Attention, and Explanation. It contains instructions for the clinician regarding the ACE process and DBQ completion. A section for PTSD diagnosis is visible, including a standard language output text and a list of DBQs to be included in the results package. The form also has fields for phone number and 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 ERA.

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.

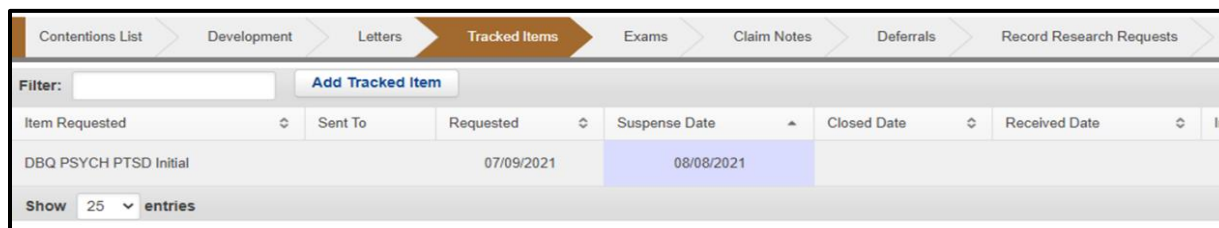


Note: User must upload a copy of the “2507 Request” created in the CAPRI system to the VBMS E-folder.

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

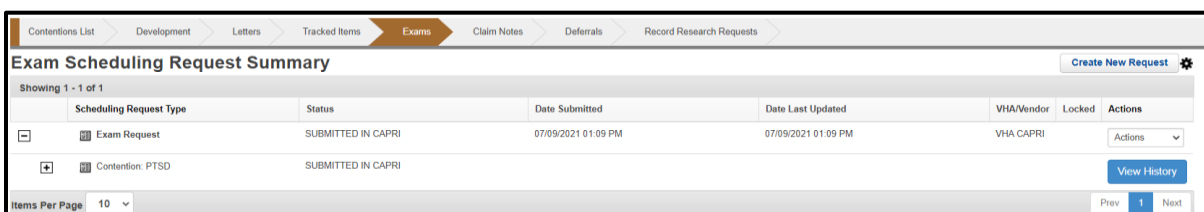
EXAM MANAGEMENT SYSTEM JOB AID

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.



The screenshot shows a navigation bar with tabs: Contentions List, Development, Letters, Tracked Items (selected), Exams, Claim Notes, Deferrals, and Record Research Requests. Below the navigation bar is a filter input field and an 'Add Tracked Item' button. A table displays tracked items with columns: Item Requested, Sent To, Requested, Suspense Date, Closed Date, and Received Date. One row is visible with the following data: Item Requested: DBQ PSYCH PTSD Initial, Requested: 07/09/2021, Suspense Date: 08/08/2021. At the bottom, there is a 'Show 25 entries' dropdown.

After the ESR has been certified, the ESR information will be displayed under the exam chevron. The status will indicate “Submitted in CAPRI” and “VHA CAPRI” will be shown as the destination.



The screenshot shows the 'Exam Scheduling Request Summary' page. The navigation bar includes: Contentions List, Development, Letters, Tracked Items, Exams (selected), Claim Notes, Deferrals, and Record Research Requests. The page title is 'Exam Scheduling Request Summary' with a 'Create New Request' button. Below the title, it says 'Showing 1 - 1 of 1'. A table lists scheduling requests with columns: Scheduling Request Type, Status, Date Submitted, Date Last Updated, VHA/Vendor, Locked, and Actions. One row is shown: Exam Request, SUBMITTED IN CAPRI, 07/09/2021 01:09 PM, 07/09/2021 01:09 PM, VHA CAPRI, and Actions. Below the table, there is a 'View History' button and a pagination control showing 'Items Per Page 10' and 'Prev 1 Next'.

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 ERRAs.

Step 2: If ERRAs indicate 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](#).

EXAM MANAGEMENT SYSTEM JOB AID

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.