#### Dependency - Exam Scheduling Request (ESR) Job Aid

Prior to submitting an ESR in the Exam Management System for a dependent, the user must ensure that the dependent (spouse/child) is correctly identified within VBMS as a dependent. The user must also ensure that a contention is correctly identified in the contention development tab. It is essential that the user has the correct options identified in the applicable drop downs as this directly affects the ability to order an exam.

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

#### **TOPIC 1: Adding Dependents**

**Step 1:** Navigate to the dependents screen from the Veteran drop down menu.



Step 2: Click Create New Dependent Button



Step 3: Input all required fields as identified by the "\*"

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* First Name:		11	Middle Name:		* Last Name:		
* Relationship Type:		Ŷ					
Begin Date:	MMDDAYYYY			End Date:	MM/DD/YYYY	=	
SSN			-	Gender:	Other	<b>v</b>	
*Birth Date:	MMDDYYYY			Death Date:	MM/DD/YYYY		
Mobile Phone - Ext:	1	1		Address Type:	Bomestic O Internation	al O Military	
Email Address:				Address 1:			
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Step 4: Verify the correct dependent type from the drop-down menu (Spouse, Child, or Parent)

**Note:** If the dependent has a different address or phone number than the Veteran, this information must be added in this section for the information to be correctly generated in the ESR.

#### **TOPIC 2: Adding Dependent Contentions**

Step 1: Click the Add Button on the Contentions Screen

V						EXPAND CLAIM DETAILS			۲
	Contentions	Development	Letters	Tracked Items	Exams Clai	Notes Record Research Requests	$\geq$		
Add	Edit	Delete Copy	Documents						Choose an Action *
	Conten	ition	Туре	Date of	Classification	Verified Medic	al Special I	Rated Iss Deferral(s)	Active ESR Document

**Step 2:** Add contention and select corresponding contention classification (helpless child, spina bifida\*, Aid & Attendance Spouse)

Step 3: Verify date of contention

Step 4: Verify the correct type of contention from drop down menu

* Contention		
Choose a contention		
Classification		
Choose a classification		
Гуре	* Date of Contention	Medical
New	✓ 01/26/2022 €	Yes
Special Issue(s)		
Special Issue(s) Choose a special issue		
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Contentions List Development	Letters Tracked Items E	cams Claim Notes
*Contention:	1	
*Classification:		
* Date of Contention:	05/05/2019	· · · · · · · · · · · · · · · · · · ·
Verified:	Yes	
Type:	New	
Medical	Yes	
Special Issue:		-

**Note:** You are required to select the correct contention classification from the drop-down menu, for EMS to suggest to the appropriate DBQ for the examination. The contention type must also be correct to ensure the appropriate standard language is added to the ESR.

Topic 3 Creating Exam Scheduling Request (ESR) for a Dependent.

Step 1: Click the exam chevron. Then, select "Create New Request".

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TONY GALDAMEZ File #: 762054883							Veteran	<ul> <li>Intent To File</li> </ul>	Claims -	Documen	ts Rated Issues Notes 💕
020 - Helpless child			Open Claim Check	Edit Claim D	letail Create DC S	Upload Document	New Claim	SSA Inquiry	Manage Evid	ence	Veteran Summary
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											<ul> <li>Dependents</li> </ul>

**Step 2:** Select the box for the appropriate contention(s). Once the dependent contention is selected, a drop-down box will appear. Select the dependent that requires an examination.

The Claim Information button will turn green, and you must click it to proceed. If the system does not allow you to select a contention, there is an error in the way the information or attributes under the contention tab was entered.

The user must go back to the contention and revise accordingly:



Contentions	Development Letters Tracked Items Exams Claim Notes Reco	rd Research Requests			
<ul> <li>Select Contention</li> </ul>	Claim Information O Contention Information O Preview		Submit Request	Delete Request	Save Request
Select Contentions					Â
Showing 1 - 4 of 4					
2	Contention Name 🔺	Classification		Туре	
	aid and attendance	Aid & Attendance Spouse		NEW	
This contention is not avail	lable for exams because a contention with classification 'Helpless Child' is selected.				
There are no rated issues	for this contention				
	helpless child	Helpless Child		NEW	
Examinee Selection		600987322 - BATTEIGER, JANE 👻			
		600987322 - BATTEIGER, JANE 600987331 - BATTEIGER, JOHN			
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Select Contentions     Select Contentions	Claim Information     Contention Information     Preview		Submit Request	Delete Request	Save Request
There are no rated issues     Select Contentions     Select Contentions     Showing 1 - 4 of 4	for this contention     Claim Information     Contention Information     Preview		Submit Request	Delete Request	Save Request
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**Note:** All other contentions on the claim are unavailable for selection. The dependent ESR must be ordered independently.

**Step 3:** Verify Dependent's address (provided in topic 1). If an alternate address is needed or the Dependent has temporarily relocated, use the Preferred Geographic Location selection, to enter the temporary address.



Select Contentions   Claim Information	Contention Information Preview		Submit Request	Delete Request Save Re
im Information				
Veteran Priority Issues:		Veteran Alternate Phone Number:		
Select to Add		•		
Mailing Address of Claimant: 123 CHLD STREET SANCV. UT 84552 USA				
Does the Claimant have a Preferred Geo	graphic Location? ( Yes ) No			
Power of Attorney: POA Type				
None POA Generic POA Code				
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[	* Does the Claimant have a Preferred Geographic Lo	cation?   Yes   No		
	* Does the Claimant have a Preferred Geographic Lo @ Domestic International Milit	cation? • Yes No		
	* Does the Claimant have a Preferred Geographic Lo	cation? ⊚ Yes _ No ary *Oty:		
	* Does the Claimant have a Preferred Geographic Lo @ Domesic International Mate * Address Line 1:	cation? ⊚ Yes _ No ary * City:		
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- a. User has option to select whether the claim is ACE eligible, or Claimant must report to exam.
- b. If a Medial Opinion (MO) or specialty language is needed, the user must select the appropriate opinion or examination verbiage. If not, the system automatically populates standard language based on the contention type, classification, and DBQ selection.

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c. Depending on the specialty language chosen, users must ensure that red asterisk fields are populated accordingly, and tabbed evidence is noted in the tabbed evidence description field.



d. The "Other" specialty instruction option provides 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 4**: Next, the user will add the following information from the *Supplemental Language Matrix* to the "Additional Information" box:

- Social Security Number (SSN)
- Date of Birth

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Select Contections      Claim Information     O Contection Information     O Preview	Submit Regut	st Delete Request	Save Request
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Employment Impact Assessment Requested?			
Contention Priority Issues			
- Select to Add -			~
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Is a Medical Opinion Needed?			
- Select Medical Opinion -			~
Is Additional Language Needed?			
Select Additional Language			~
* To add a DBQ, select a DBQ from the DBQ(c) list and move it to the Selected DBQ(s) list using the buttons provided.			
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**Step 5**: Next, the user will select a corresponding DBQ based on the contentions. EMS will highlight the recommended DBQ based on the classification chosen for the contention. After selecting the DBQ in the 'Available DBQs' section, you click the chevron 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 you must always select 'DBQ Medical Opinion (Examiner's Version)' **in addition** to the DBQ selected for the contention.

**Note:** Spina Bifida claims are processed at the Denver Regional Office. The new Spina Bifida DBQ should not be used for helpless child claims.



Contentions List Development Letters Tracked Ite	ms Exams	Claim Notes Deferrals	
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DBQ Medical Opinion (Examiner's Version)	>>		
DBQ A&A Worksheet - VA Form 21-2680	- 1		
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DBQ AUDIO Hearing Loss and Tinnitus			

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**Step 6.** Next click 'Preview' from the Exam subcategories list. This will generate a PDF Exam Scheduling Request (ESR) which will contain the information provided to the examiner. Review the PDF and validate that all necessary information is included, then can close out the PDF. If any information needs to be amended, you can go back and update as necessary.

You can now click 'Submit Request':

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**Step 7:** The user will select the recommended MDE Vendor destination. If an alternate MDE Vendor must be chosen, the user must use the "View Alternate Vendor Destinations".

Note: Use of Alternate MDE Vendor destination will require a justification.

**Step 8:** After clicking 'Preview' and again reviewing the ESR, you can now click 'Submit'. Once you submit from this point, you cannot make changes to the ESR. You can only modify the ESR once the submission is in "triage" or "open" status.

Exam Destination	
Recommended Vendor Destination:	
	View Alternate Destinations
Cancel Preview Submit	

**Note:** Prior to ordering the exam, if at any point you must close out before submitting the request, you can return to the Exam chevron and if you had saved your work, you will be able to edit your draft request.

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**Step 9:** Upon submitting the ESR, you should verify that the correct 'Tracked Items' were created and that the claim suspense updated appropriately:

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**Step 10:** After the ESR has been submitted, you can review the ESR metadata by clicking the Newspaper icon from the Exams Chevron: The status will indicate "Processing" until the ESR has been accepted by the MDE Vendor. Once the MDE vendor has accepted the ESR, the status will show "Triage".

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U.S. Department of Veterans Affairs 9

#### \*Spina Bifida Claims:

#### Spina Bifida claims are processed at the Denver Regional Office only

If ordering a spina bifida examination, in addition to the information above the following information should be added to the "Is Additional Language Needed?" and "Other" box:

Then add in the following language as necessary:

All records can be found under the child's record under: (enter the specific information)

This is a spina bifida [examination or review medical opinion] request for XXXX, SSN XXXX, a child of a Vietnam veteran.

Edit to read birth defects if the claim/appeal pertains to specific birth defects under Chapter 18.

Please use the alternate phone number to contact the child if necessary.

THE CHILD MUST REPORT TO THIS EXAM.

Include this statement when an in-person exam is required as for a BVA remand.

THE CHILD'S POA IS \_\_\_\_\_.

Not needed if POA for child is same as veteran. If the system did not allow you to enter a specific POA for the child, a remark should be made here.

List Tabbed Evidence if applicable – that evidence will be under the claimant's SS

In Additional Specially Language Needed? Compare don-under 38 U.S.C. 1151	
Tabled Evidence Description	

