Enhanced Exam Scheduling Request

(ESR) Training

Lesson Plan

Time Required: 1.75 Hours

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| Lesson Description | |
| The information below provides the instructor with an overview of the lesson and the materials that are required to effectively present this instruction. | |
| TMS # | 4519798 |
| Prerequisites | None |
| target audience | The target audience is intended for personnel who are responsible for scheduling examinations in VBMS.  Although this lesson is targeted to teach the VSR/RVSR, Entry, Intermediate or Journey Level employee, it may be taught to other VA personnel as mandatory or refresher type training. |
| Time Required | 1.75 hours |
| Materials/ TRAINING AIDS | Lesson materials:   * Enhanced Exam Scheduling Request Power Point * Job Instruction Sheet(s) |
| Training Area/Tools | The following are required to ensure the trainees are able to meet the lesson objectives:   * Classroom or private area suitable for participatory discussions * Seating, writing materials, and writing surfaces for trainee note taking and participation * Handouts, which include a practical exercise * Large writing surface (easel pad, chalkboard, dry erase board, overhead projector, etc.) with appropriate writing materials * Computer with PowerPoint software to present the lesson material   Trainees require access to the following tools:   * VA TMS to complete the assessment * Compensation Service Intranet: Rating Job Aids * Internet access for the Live Manual * Internet access for Electronic Code of Federal Regulations |

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| Pre-Planning | * Become familiar with all training materials by reading the Instructor Lesson Plan while simultaneously reviewing the corresponding PowerPoint slides. This will provide you the opportunity to see the connection between the Lesson Plan and the slides, which will allow for a more structured presentation during the training session. * Become familiar with the content of the trainee handouts and their association to the Lesson Plan. * Practice is the best guarantee of providing a quality presentation. At a minimum, do a complete walkthrough of the presentation to practice coordination between this Lesson Plan, the trainee handouts, and the PowerPoint slides and ensure your timing is on track with the length of the lesson. * Ensure that there are copies of all handouts before the training session. * When required, reserve the training room. * Arrange for equipment such as flip charts, an overhead projector, and any other equipment (as needed). * Talk to people in your office who are most familiar with this topic to collect experiences that you can include as examples in the lesson. * This lesson plan belongs to you. Feel free to highlight headings, key phrases, or other information to help the instruction flow smoothly. Feel free to add any notes or information that you need in the margins. |
| Training Day | * Arrive as early as possible to ensure access to the facility and computers. * Become familiar with the location of restrooms and other facilities that the trainees will require. * Test the computer and projector to ensure they are working properly. * Before class begins, open the PowerPoint presentation to the first slide. This will help to ensure the presentation is functioning properly. * Make sure that a whiteboard or flip chart and the associated markers are available. * The instructor completes a roll call attendance sheet or provides a sign-in sheet to the students. The attendance records are forwarded to the Regional Office Training Managers. |

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| **Enhanced Exam Scheduling Request (ESR) Training** | | |
| **INSTRUCTOR INTRODUCTION** | | Complete the following:  Introduce yourself  Ensure that all learners have the required handouts |
| **time required** | | 0.25 hours |
| **Purpose of Lesson** | | The purpose of the lesson is to provide the EMS End User (development personnel) an enhanced understanding of the Exam Scheduling Request (ESR) process. |
| **Lesson Objectives**  *Slide 2* | In order to accomplish the purpose of this lesson, the VSR will be required to accomplish the following lesson objectives.   * Discuss Exam Management System (EMS) current state * Understand the Examination Request Routing Assistant (ERRA) tool * Verifying End Product (EP) and Contentions * Understand system processes when entering an ESR * Successfully creating and submitting an ESR | |
| **MOTIVATION** | As part of the continued dedication to operational efficiency it is imperative that VBA maintain a strong synergy among stakeholders including external and internal customers. The following lesson is designed to provide instruction and guidance to personnel who are responsible for requesting examinations to ensure that Veterans who file claims are provided the optimum level of service that can be expected. | |
| **References**  *Slide 3* | All M21-1 references are found in the [Live Manual Website](https://vaww.compensation.pension.km.va.gov/).   * M21-1, Part IV, Subpart i,2.A.10- Examination Scheduling Request in VBMS * M21-1, Part IV, Subpart i, 2.A.1.i-Contract Examination Exclusions * M21-1, Part IV, Subpart i.2.A.2 – Examination Request Tools * Examination Request Routing Assistant (ERRA) * Veterans Benefits Management System (VBMS) User Guide * ESR Submission Job Instruction Sheets * <https://vbaw.vba.va.gov/bl/21/MDEO/dao_ems.htm> | |

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| Topic 1: Understanding the Current EMS State and ERRA | |
| **Introduction** | This topic will define the current Exam Management System (EMS) state and the current upgrades and best practices when users are entering ESR(s). |
| **Time Required** | 0.5 hours |
| **OBJECTIVES/ Teaching Points** | Topic objectives and teaching points to support the topic objectives:   * + Current EMS enhancements   + Known EMS issues   + VBMS-EMS Navigation |
| **VBMS EMS CURRENT STATE**  *Slide 4*  **Examination Request Routing Assistant**  *Slide 5-6* | EMS changes frequently as a result of consistent feedback from stakeholders. These changes allow for efficiencies to be created in the exam ordering process. Veterans Benefit Management System (VBMS) Office of Information Technology (OIT), is continuously working to resolve any outstanding issues affecting ESR(s). It is important that End Users stay current with changes and enhancements to ensure their success and avoid any potential disruption for Veterans receiving contracted Compensation and Pension (C&P) examinations.   * All contracted exams for Compensation and Pension benefits are being done through VBMS EMS * EMS 17.0 deployed May 2019 * OIT is still actively working on issues known to be affecting VBMS EMS * Continuously working with MDE Vendors to identify defects or issues affecting the Exam Scheduling Request (ESR) and responses * Users must to use ERRA to determine which system (CAPRI vs. EMS) to order the exam/medical opinion * ERRA is updated daily to control the flow of workload between VHA and contractors * Link can be found under the “Medical Disability Exam Quality & Program Management Office (218)” section of the Compensation Intranet Home Page * Enter the claimant zip code to determine the closest location for exam, should ERRA direct you to send them to VHA (CAPRI) * If ERRA says to go to VA and use CAPRI, if VAMC has disabled that type of exam needed (shown in red letters), the VAMC is not accepting exams for those conditions. * Although you will not actually be submitting a specialty DBQ in EMS/VBMS, you MUST follow the specialty exam per ERRA (Rather than using “all other exam types”). Otherwise it may cause a cancelation. For example, if you need an MO for audio, it will go into VBMS as “other”, however you will follow the Audio exam category in ERRA. |
| **EXAM INPUT DETAILS** *Slide 7* | It is important for end users to understand the EMS system functionality prior to entering ESR(s). The EMS system is designed to incorporate data derived the VBMS contentions. It is important for end users to ensure accurate contention development and labeling to allow EMS to properly assist in the creation of MDE Contracted examination requests.   * Ensure exam being requested is not on the Contract Exam Exclusion List M21-1 IV.i.2.A.1.i. * Red asterisks denote required fields * Green progress line indicates successful input * System is intuitive and should be worked from left to right * User has the ability to amend any portion of the ESR prior to submission |
| **VERIFYING END PRODUCT AND CONTENTIONS**  *Slide 8*  *ESR Submission-Job Instruction Sheet-Page1* | EMS is designed to create examination requests based on selection made by the end user. It is important that end users include **all** contentions associated with the End Product (EP) being worked, when completing the ESR. Do not create individual ESR(s) for each specific contention. This avoids hardship to the Veteran by avoiding the need to interact with more than one MDE Vendor as well as having multiple locations and times for examinations. The user must verify that the EP is cest’d properly as it directly affects the examination request. Users should also verify contentions to ensure correct classification as well as examination type.   * Ensure correct EP is selected when scheduling ESR * Ensure EP has been CEST’d correctly and contains pertinent information * Confirm classification * Verify Type (New, Secondary, Increase, Reopen, RFE) * Add Special Issue if necessary   **Note**: Reemphasize that the information entered through the **Development-Contentions** tab in VBMS is directly linked to the EMS examination request. If the information from the contentions or EP is incorrect, the examination will be incorrect. |
| **COPY CONTENTION**  *Slide 9* | The functionality of Copy Contention will continue to evolve as a result of future enhancements. However, its’ use should be emphasized in an effort to ensure continuity and preparation purposes.   * EMS allows user to copy contentions from previously closed EP(s) * The copy function ensures continuity and accuracy when working with previously used contentions |

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| **Topic 2: Creating ESR(s)** | | |
| **Introduction** | | This topic will discuss how a user creates a ESR(s) in VBMS-EMS. |
| **Time Required** | | 0.75 hours |
| **OBJECTIVES/ Teaching Points** | | This objective of this lesson is to help the user better understand process to create ESR. Students should refer to the Job Instruction Sheet during this portion of the lesson. |
| **EXAMS TAB-ESR SUMMARY**  *Slide 10*  *ESR Submission-Job Instruction Sheet-Page 2* | | The summary screen provides all current and previously requested contracted examinations. The user will be able to see the status, date as the examination was requested and the MDE Vendor that was assigned to the examination. Users initiate the process of creating ESR in this screen.   * Allows for creation of new request * Status of all previously requested examination requests |
| **EXAM TAB-SELECT CONTENTIONS**  *Slide 11*  *ESR Submission-Job Instruction Sheet-Page 2*  **EXAM TAB-CLAIM INFORMATION**  *Slides 12-13*  *ESR Submission-Job Instruction Sheet-Page 2-3* | | User will select all contentions needed for the ESR. Emphasize all contentions controlled by the same EP should be creating the ESR.   * Allows for selection of contentions for ESR submission * User must select all contentions warranting exam prior to creating ESR   User must select appropriate Veteran Claim priority. This helps the MDE Vendor identify Veterans who qualify for priority processing. EMS will update Purple Heart recipients as a Veteran priority in upcoming EMS release. It is important to indicate if a Veteran is a Purple Heart recipient in the “special instructions”. Users should ensure the following:   * Veteran/claimant Mailing Address   + Users must verify Veteran/claimant’s mailing address as ESR’s are routed based on Veteran/claimant’s zip code to appropriate MDE vendor   + If the claimant is someone other than the Veteran, you must enter the claimant address by selecting ‘Yes’ to the question in VBMS “Does the Veteran have a Preferred Geographic Location?” * Preferred Geographic Location   + Used if Veteran/claimant resides part time location different than mailing address   + For Rework; this functionality allows ESR to be routed to original MDE vendor if Veteran/claimant has moved (use Veteran/claimant’s previous address used on original ESR)   VBMS does not yet automatically populate the non-Veteran address, and so you must enter the claimant address by selecting ‘Yes’ to the question *‘Does the Veteran have a Preferred Geographic Location.* |
| **EXAM TAB-CONTENTION INFORMATION**  *Slides 14-15*  *ESR Submission-Job Instruction Sheet-Page 4* | **Instructor Note:** In this tab users are populating the majority of the language and instructions that the MDE Vendor will utilize to complete the ESR. It is important that the users include all necessary requirements of the examination. The Vendors are instructed to perform only what is populated in the ESR. The vendor will only accomplish what is specifically asked for in the ESR. If any information requirement is not included in the original ESR a new request may need to be created in order to complete a required examination for the Veteran.  **User has option to select:**   * For Pension claims, ACE Eligible must be selected * Veteran Must Report to Exam * Employment Impact Assessment Requested   **Specialty language:**   * Allows user to select appropriate opinion or examination verbiage * Allows user to indicate tabbed evidence and special instructions to MDE vendors if applicable   **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. | | |
| **EXAM TAB-PREVIEW**  *Slide 16*  *ESR Submission-Job Instruction Sheet-Page 5-6* | User must verify information is correct prior to advancing. A PDF will be created which will be uploaded into VBMS once ESR is submitted. Contentions can only be deleted from the request and are not able to be added once the ESR is submitted.   * Information entered incorrectly will require that user cycles to appropriate tab to make changes * Must preview the ESR prior to submittal   **Note:** User will be asked again later to preview the ESR. Once exam is submitted, changes cannot be made. | | |
| **EXAM DESTINATION TOOL**  *Slide 17*  *ESR Submission-Job Instruction Sheet-Page 7* | User must select the recommended MDE Vendor. Although a user may submit an alternate MDE Vendor there must be a justification provided.  **Note to Instructor:** Rework may be a primary reason for choosing an alternate MDE Vendor. Special circumstances or special instruction from program management office. Rework will be discussed if additional training focusing specifically on ESR Rework. | | |
| **TRACKED ITEMS**  *Slide 18*  *ESR Submission-Job Instruction Sheet-Page 8* | EMS creates all tracked items automatically. Users can and should update tracked items that VBMS creates as necessary.   * Exam “Request Processing” tracked item-two day suspense * An Exam Request Contention tracked item is created- 30 day suspense   **Note:** The “Request Processing” tracked item will close automatically. | | |
| **ESR STATUS**  *Slide 19*  *ESR Submission-Job Instruction Sheet-Page 9* | The ESR status will set to “Processing” while awaiting the designated MDE Vendor to acknowledge the ESR. No modification can be made on the exam submission until the ESR is in “Triage” or “Open” status. | | |
| **SAVE FUNCTION**  *Slide 20* | If the user is unable to complete the ESR while initially developing, the save function allows the user to save the ESR and complete at a different time. The Save Function does not require user initiation.   * The Status of an incomplete ESR will default to “Draft” * Users can edit the “Draft” by selected “Edit” from the actions drop down in the ESR summary screen | | |
| **COPY ESR FUNCTION**  *Slide 21* | The copy function is available for any previously cancelled or completed ESR under the current EP.  The “Copy” function allows user to create a new ESR without redundancy. It allows the user to make changes or additions prior to submitting a new ESR. | | |
| **AUTOFILL FUNCTION**  *Slide 22* | The autofill functionality is not widely used, however it is a valuable tool that prevents potential redundancy in ESR ordering. The Autofill function allows for EMS to auto populate the examination language with minimal user input:   * Intended for Contentions with no variance in DBQ selection (Hearing loss/Tinnitus) * Users must allow time for functionality to work * Once Autofill is selected and the contentions entered, the user will have to exit the exam tab to allow the autofill to take effect.   **Note:** It is essential if the Autofill function is being utilized, that the user verify components of the ESR were created accurately prior to submitting the ESR. The Autofill tool will pull information from the contentions in the development tab of VBMS, therefore inaccuracies related to classification will cause an incorrect DBQ to be selected. | | |

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| **Helpful Tips**  *Slide 23* | * All exam requests must be routed to VHA or contractor per ERRA. * Review the History and Details screens for each Contention. * Use the vendor portal when expected results are not found and contact the vendor directly to ensure all DBQ’s have been finalized. * Review the Documents file in VBMS completely as DBQ(s) could be mislabeled. * Close corresponding tracked items when applicable. EMS creates all necessary tracked items for the ESR’s. EMS will open or close these tracked items accordingly |

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| **Lesson Review and Wrap-up** | | | |
| **Introduction**  *Discuss the following:* | | | Enhanced Exam Scheduling Request |
| **Time Required** | | | 0.25 hours |
| **Lesson Objectives** | | | You have completed Enhanced Exam Scheduling Request training.  The trainee should be able to demonstrate a comprehensive understanding of scheduling an examination through EMS.   * Discuss the EMS current state * Understand the Examination Request Routing Assistant (ERRA) tool * Verifying End Product (EP) and Contentions * Understanding System Details when entering an ESR * Successfully creating an ESR |
| **REVIEW DISCUSSION** | | Review any questions that the students may have about the process.   * Provide a live demo if applicable * Review the Job Instruction Sheet | | | |