Enhanced Exam Scheduling Request (ESR)

Rework for PMCs

Lesson Plan

Time Required: 1.5 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 # | 4520752 |
| 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 | 1.5 hours |
| Materials/ TRAINING AIDS | Lesson materials:   * Enhanced Exam Scheduling Request Power Point * Job Instruction Sheet |
| 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 acces for the Live Manual * Internet acces 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 this training is to help the user better understand the process of using rework function in the Exam Management System (EMS). |
| **Lesson Objectives**  *Slide 2* | In order to accomplish the purpose of this lesson, the VSR will be required to accomplish the following lesson objectives.   * Understanding System Details when entering a Rework ESR * Successfully creating an Rework ESR * Understanding steps to take when Rework option is not available | |
| **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. | |

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| **Topic 1: Understanding EMS Rework Process** | |
| **Introduction** | This topic will define the current Exam Management System (EMS) Rework process as well as the criteria needed to create a Rework ESR. |
| **Time Required** | 0.5 hours |
| **OBJECTIVES/ Teaching Points** | Topic objectives and teaching points to support the topic objectives:   * + Understanding EMS criteria for rework   + Understanding appropriate terminology for EMS Rework   + Understanding the steps necessary for an EMS Rework |
| **TERMINOLOGY**  *Slide 4* | It is essential that the user properly interpret the results of a completed ESR. A user **must not request a ESR** **Rework** for any requirement that had not been previously requested from MDE Vendor (missing opinion request or contention).  Rework has two categories in EMS:   * EMS Insufficient * EMS Clarification   For each contention the User must select which type of rework category:   * EMS insufficient- Missing information on DBQ requested needed for rating purposes * EMS clarification-Information on the DBQ provided needs additional information for rating purposes |
| **INITIATING EXAM REWORK**  *Slide 5-6* | It is important to emphasize that if there are any missing packages in a completed ESR the Rework option may not be available. The user **does** have the ability to contact the MDE Vendor and have them replay any missing messages.  Prior to ordering a Rework exam request, the user must ensure that the ESR is in a “Completed” status. Additionally, the following messaging must be reflected in the history:  • ESR acknowledgement  • appointment completed  • results available package for the ESR requiring the rework  **Note:** If an ESR remains in “Open” status and a “Rework” is needed review that all EMS messaging was received for the contention, if not contact the MDE Vendor to resend/replay the missing message. |

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| **INABILITY TO CREATE A REWORK REQUEST**  *Slide 7-8* | Certain limitations in EMS, as well as system work arounds, have impacted ESR Rework functionality.  If EMS rework functionality is not available, the user must submit a ***new request***. The following language must be inserted into the special instruction field of the new request:  *“This is a rework request for the UUID shown. This is being submitted as a new request because the rework functionality is not currently available for this claim.”*  **Note*:*** The *Request UUID* can be found on the previously completed examination on the history tab.  **Note:** The “Copy” ESR functionality can be used on an ESR in completed or cancelled status. Refer to the Copy ESR Job Instruction Sheet.  **Note**: UUID-Unique Universal Identifier is located in the ESR “History” by using the “Actions” drop down. |

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| **Topic 2: Creating Rework ESR** | | |
| **Introduction** | | This topic will discuss how a user creates a ESR(s) in VBMS-EMS. |
| **Time Required** | | 0.5 hours |
| **OBJECTIVES/ Teaching Points** | | This objective of this lesson is to help the user better understand process to create ESR Rework. Students should refer to the Job Instruction Sheet during this portion of the lesson. |
| **EXAM REWORK-SELECT CONTENTIONS**  *Slide 9*  *Rework Job Instruction Sheet 2* | | The user must select all contentions requiring ESR Rework.  **Note**: Have trainees open the “Rework” Job Instruction Sheet to follow along. |
| **EXAM REWORK-CLAIM INFORMATION**  *Slide 10*  *Rework Job Instruction Sheet 2-3* | | In the Claim Information screen the user must verify that the Veteran/claimant address is correct.   * If the Veteran/claimant has relocated since the completion of the previously scheduled examination, the user must select “The Preferred Geographic Location” and enter the address where the previous examination was referred to. This process allows the system generate the correct MDE Vendor options. * Rework ESR should always be returned to the MDE Vendor that previously completed the original examination.   **Note:** Very important not to select a ESR “Rework” request for a medical opinion that was not on the original request. If the Medical Opinion was not originally requested it is a new request.  Also, if the claimant is someone other than a Veteran, you will need to select ‘Yes’ to the question “Does the Veteran have a preferred Georgraphic Location” and enter the claimant’s address. |
| **REWORK REQUEST-CONTENTION INFORMATION**  *Slides 11-12*  *Rework Job Instruction Sheet 3-4* | User must provide a Rework Type by using the drop-down arrow and then choosing insufficiency or clarification. Users must then select the Rework Reasons and provide a detailed rationale for the rework.  **Note**: It is important that users select the correct rework type in ensuring whether the ESR Rework is a insufficient exam or a clarification. Reemphasis terminology.  **Important note:** Do not submit a ESR Rework request for a medical opinion that was not on the original exam request. **In other words, if medical opinion was not previously requested on the ESR, a new ESR must be created. This process also includes the submission of Individual Unemployability (IU) claims that did not originally have the necessary opinion.** | | |
| **EXAM REWORK-PREVIEW**  *Slide 13*  *Rework Job Instruction Sheet 4* | 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 | | |
| **REWORK REQUEST-SUBMIT**  *Slide 14*  *Rework Job Instruction Sheet 5* | EMS will recommend the MDE Vendor to use. If the system recommended MDE Vendor did not previously complete the examination needed for rework, use the alternate vendor functionality*.*  **Important Note:** It is essential that the ESR Rework request be submitted to the MDE Vendor that completed the original examination. | | |
| **ESR REWORK-STATUS**  *Slide 15*  *Rework Job Instruction Sheet 6-7* | The status and messaging of the ESR Rework will be the same rules of an original ESR. Tracked items will also be created automatically by the VBMS-EMS system. The user should expect the same messaging to determine the different statuses that the ESR Rework will undergo until completion.  **Note:** Rework(s) will follow the same work flow as an original request. MDE Vendors do have the option to ask for claraification or potentially request a cancellation. | | |
| **COPY ESR FUNCTION FOR REWORK**  *Slide 16* | If EMS rework functionality is not available and you are needing to submit as new exam, you can use the clone function to avoid re-entering the ESR.  Note: Demonstrate to trainees the “Copy ESR” Jobsheet. | | |

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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.   * Understand the EMS current state * Verifying End Product (EP) and Contentions * Understanding System Details when entering a 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 | | | |