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| **PART VIII. Program Oversight**  **SECTION A. VR&E Program Oversight and Internal Control** | |
| **CHAPTER 4. WORKLOAD MANAGEMENT** | |
| **Objectives** | After completion of this training, VR&E staff is expected to:   * Understand the purpose of workload management and how workload management assists in meeting an office’s performance standards. * Understand the procedures for developing a workload management plan. |
| **Contents** | VR&E Performance Standards  Data Sources for VR&E Performance Measures  a. Case Management Index (CMI)  b. VR&E Intranet Reports  c. Monthly Operations Reports (MOR)  d. Pending Issue File (PIF) Reports  e. VRE Quality Assurance (QA) Reports  f. VETSNET Operations Reports (VOR)  g. Tracking End Products (EPs)  1. Using the VETSNET Operations Reports (VOR)  2. Procedures for Accessing the VOR Reports  Data Management and Analyses  a. Workload Management Plan  b. Fiscal Management Reports  c. Performance Management Reports  d. Caseload Management Reports  e. Transfer Management Reports  f. Leadership Management Reports  g. Data Integrity Management  Guidelines on Developing a Workload Management Plan (WMP)  a. Definition  b. Components of a WMP  1. Overview  2. Processing of Applications (Chapter 31 and Chapter 36)  3. Performance Measures and Targets  4. Findings and Analyses  5. Action Plans  Assessment of Internal Controls and Management’s Statement of Assurance  a. Purpose  b. Mandatory Management Controls  c. Submission |
| **Appendices** | Appendix J. National Performance Standards  Appendix O. VA Forms  Appendix AU. Workload Management Plan Template |
| **Exercises** | 1. Describe the standards for a VR&E office’s performance. 2. What are the sources for data needed in assessing an office’s workload management? 3. Discuss the process for developing an effective workload management plan. 4. What are the requirements for a statement of assurance for management and quality control? |
| **Rescissions** | Refer to VR&E Letter 28-14-05, Release of M28R, Part VIII, titled Program Oversight, which was released on November 27, 2013, or to the KMP in Policies & Guidance under the column ‘Rescinded’. |