## Section C. Control of Examinations

#### Overview

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| In This Section | This section contains the following topics: |

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| Topic | Topic Name |
| 1 (old 16) | Control and Follow-Up of Examination Requests |
| 2 (old 17) | Control of Future Examinations |

#### 1. Control and Follow-Up of Examination Requests

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| Introduction | This topic contains information about control and follow-up of examination requests, including   * determining the appropriate suspense date for examinations, and * checking the status of examination requests under special circumstances. |

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| Change Date | May 1, 2015 |

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| a. Determining the Appropriate Suspense Date for Examinations | The initial suspense date of the pending end product (EP) is established automatically based on the suspense reason selected in the Veterans Benefits Management System (VBMS) or Modern Award Processing-Development (MAP-D).  If the examination has not been completed once the suspense date matures, review the status in the Compensation and Pension Records Interchange (CAPRI), and update the suspense date based on the anticipated completion date of the examination.  ***Reference***: For information on how to receive automated e-mail notifications when examinations requested through CAPRI are completed or cancelled, see the [Guide for Updating Forwarding E-mail Addresses in CAPRI](http://vbaw.vba.va.gov/bl/21/DEMO/docs/CAPRI/CAPRIupdateemail.doc). |

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| b. Checking the Status of Examination Requests Under Special Circumstances | Use the table below to check the status of expedited or overdue examination requests. |

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| If the issue relates to … | Then the regional office (RO) personnel can check the status of the examination request by … |
| an expedited follow-up required by special circumstances | a telephone or personal conference with the clinical director, if needed. |
| * a request for an expedited examination, or * an inquiry on the status of an overdue examination | telephone contact. |

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#### 2. Control of Future Examinations

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| Introduction | This topic contains information about controlling future examinations, including   * types of future examination controls * establishing future examination control in a rating decision * establishing future examination control without a rating decision, and * action when the control period for the future examination matures. |

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| Change Date | May 1, 2015 |

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| a. Types of Future Examination Controls | The different types of future examination controls are   * control established through completion of a rating decision, and * control established without a rating decision. |

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| b. Establishing Future Examination Control in a Rating Decision | Use the table below for information on establishing future examination control in a rating decision completed using VBMS for Rating (VBMS-R) or Rating Board Automation (RBA) 2000. |

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| If a future examination … | Then in the EXAMINATION section of the ISSUE MANAGEMENT – DECISION ENTRY screen … |
| should be scheduled immediately, or during the current month | select AT ONCE. |
| should be scheduled at a later date | enter the future examination date in the DATE field.  ***Note:*** The earliest date allowed is the first day of the following month. If an earlier examination is required, select AT ONCE. |
| is not warranted | select STATIC DISABILITY (NO EXAM). |

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| ***References***: For more information on   * the ISSUE MANAGEMENT screen in * RBA2000, see the [RBA2000 User Guide](http://vbaw.vba.va.gov/VetsNet/RBA2000_Docs/webhelp/RBA2000_Help.htm), or * VBMS-R, see the [VBMS-Rating User Guide](http://vbaw.vba.va.gov/VBMS/docs/VBMS_Rating_UserGuide.pdf) * examination requests, see M21-1, Part III, Subpart iv, 3.A * determining the need for review examinations, see M21-1, Part III, Subpart iv, 3.B.2, and * determining basic eligibility to Dependents’ Educational Assistance (DEA), see M21-1, Part IX, Subpart ii, 2.1. |

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| c. Establishing Future Examination Control Without a Rating Decision | Use the table below for information on establishing future examination control when the rating activity determines that a review examination is necessary, but control is not established by a rating decision. |

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| **If ...** | **Then establish control by using...** |
| * there is an active corporate record, and * another future examination diary is not currently pending | the diary command in Share with reason code 01.  ***Note:*** A future examination diary cannot be added for a date greater than five years in the future. |
| * there is not an active corporate record, and * the examination date is neither * less than 10 days in the future, nor * greater than one year in the future | a future pending issue under end product (EP) 310 established in VBMS or Share. |
| the future examination cannot be controlled under either situation described above | a local diary.  ***Note***: Individual ROs may exercise discretion in the manner in which they control these cases. |

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| ***Reference***: For more information on establishing future examination control in   * Share, see the [Share User Guide](http://css.vba.va.gov/SHARE/), or * VBMS, see the [VBMS User Guide](http://vbaw.vba.va.gov/VBMS/docs/VBMS_Release_8_0_UserGuide_UsersEdition.pdf). |

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| d. Action When the Control Period for the Future Examination Matures | When an810 series work item *631A Future Physical Examination* or *631R Review Need for Reevaluation* is generated, a future pending issue matures, or a local diary matures, the claims folder is referred to the rating activity for review.  Use the table below to determine the subsequent action. |

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| **If the rating activity determines that it is necessary to …** | **Then …** | **And …** |
| proceed with the examination | establish an EP 310   * use the date on the 810 series work item, *631A Future Physical Examination*, or *631R Review Need for Reevaluation* as the date of claim, and * ensure the SUPPRESS ACKNOWLEDGEMENT LETTER checkbox is selected.   ***Note***: Do not establish an EP 310 if another EP is already pending for the specific disability under review. Instead, complete all necessary action under the existing EP. | request an examination. |
| cancel the examination | complete a rating decision to establish permanency. |
| advance the date of the examination | cancel the future examination control | * establish a new future examination control, and * add a system note including the * reason(s) for postponing, and * new date of the examination. |