QUALITY REVIEW TEAM (QRT) IMPLEMENTATION OVERVIEW (DAY 2)

INSTRUCTOR LESSON PLAN

TIME REQUIRED: 8 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 #

2695963

PREREQUISITES

Prior to this lesson, the Quality Review Specialist (QRS) should have Individual Performance Review, 5 Case Monthly Review (ASPEN) training. Attendees should also have completed "Giving Constructive Criticism," TMS # 1327127. Prior experience accessing the STAR database is also required.

TARGET AUDIENCE

The target audience for Quality Review Team (QRT) Implementation Overview training is the employee who has been selected to be a Quality Review Specialist (QRS) as part of the regional office (RO) QRT.

TIME REQUIRED

8 hours

MATERIALS/ TRAINING AIDS

Lesson materials:

- Quality Review Team Implementation Overview PowerPoint Presentation
- Quality Review Team Implementation Overview Trainee Handout Packet

TRAINING AREA/TOOLS

The following are required to ensure the trainees are able to meet the lesson objectives:

- Access to Live Meeting
- Area suitable for participatory discussions
- Seating, writing materials, and writing surfaces for trainee note taking and participation
- Handouts, which may include a practical exercise or homework assignments
- Appropriate presentation materials
- Computer with Microsoft Office software to present the lesson materials

Trainees require access to the following tools:

- VA TMS to complete the assessment
- Access to Compensation Service STAR database located at: http://vbaw.vba.va.gov/bl/21/index.htm

LIVE MEETING PRE-PLANNING

During pre-planning and setup for Live Meeting, the instructor should do the following:

- Upload all lesson materials; create web pages, whiteboards, snapshots, polls, and other required interactions prior to the start of the training. It is important to rename these documents so that they are meaningful to the instructor.
- Both prior and during the training, use the “annotate and highlight” features to callout information to the trainees.
- Review the lesson plan and identify compression checks, exercises, and demonstrations that require the use of the Live Meeting Polling feature. It is necessary to create these items in Live Meeting prior to the start of the training.
- If you would like to review a document with the trainees that was not available for access prior to the start of the session, use one of the following Live Meeting features, which will allow the trainees immediate access to the information:
    - Upload into handouts
    - Share program/desktop
- If you would like to share a hyperlink with the trainees, such as the Compensation Service STAR database, do the following:
    - Use the Web Page tool and copy and paste the link. The web page will appear in the content area of the Live Meeting interface.

GENERAL 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.
- ☐ Review the Live Meeting Job Aid
- ☐ 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 you have copies/access to required documents
- ☐ 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 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.

LIVE MEETING TIPS

- ☐ A virtual meeting requires more preparation than a presentation given to a live audience.
- ☐ Reference the “Using Live Meeting for Training” Job Aid for additional information
- ☐ Test the connectivity of all sites before the training begins.
- ☐ In addition to the presenter, always have a facilitator available who can support participants with technical issues as well as monitor any chat questions that arise.
- ☐ To minimize background noise, use the “mute” feature to mute all attendees and only take questions via the chat box.
- ☐ If using video conferencing, striped shirts do not transmit well on camera nor does large, shiny jewelry. Both can be visually distracting. Try to keep your body movements to a minimum as excessive movement can actually degrade video quality.
- ☐ Always assume when you walk into the room that the microphones are already live to other locations. This helps prevent any extraneous pre-meeting conversation from being broadcast when you might not intend it.
- ☐ During the training, move at a slightly slower pace than a typical meeting due to a two to three second delay for most systems to communicate.
- ☐ If you are leading the meeting, make sure there are sufficient pauses after asking a question.
- ☐ Encourage trainees to submit questions about the training before the training begins. Review/answer these questions at the start of the training to help engage the participants.

INTRODUCTION TO QRT IMPLEMENTATION OVERVIEW

INSTRUCTOR INTRODUCTION

Time: 5 minutes

Slide 1 of the QRT Welcome PowerPoint

Complete the following:

- Introduce yourself
- Orient learners to the facilities
- Ensure that all learners have the most up-to-date handouts

LIVE MEETING

Time: 15 minutes

Slides 1-4 of QRT Welcome PowerPoint

Access the “QRT Welcome” PowerPoint and review the Live Meeting information with the trainees:

- Connectivity **(Slide 1)**
- Q&A panel **(Slide 2)**
- Feedback tool **(Slide 3)**
- Technical Support **(Slide 4)**

TIME REQUIRED

. 50 hours

PURPOSE OF LESSON

Time: 1 minute

This lesson is intended to provide the Quality Review Specialist (QRS) with the information required for implementation of a Quality Review Team (QRT) at each regional office (RO). This lesson will also present the most common B2 errors. This lesson will contain discussions and exercises that will allow you to gain a better understanding of:

Slide 1 (This begins the Day 2 lesson slides)

- Philosophy of a Quality Review Team (QRT)
- Case Reviews
- Roles and Responsibilities within the Quality Review Team
- Most Common B2 Errors: Failing to Request Examinations
- Quality Review: New and Material Evidence

LESSON OBJECTIVES

Time: 2 minutes

Handout 2

Slide 2

In order to accomplish the purpose of this lesson, the Quality Review Specialist (QRS) will be required to accomplish the following objectives by completing an end of course assessment.

The QRS will be able to:

- Given the trainee handout packet and references, identify the philosophy of a Quality Review Team (QRT), with 80% accuracy.
- Given the trainee handout packet and references, identify the types of case reviews that will be conducted by the Quality Review Team (QRT), with 80% accuracy.
- Given the trainee handout packet and references, identify the roles and responsibilities within the Quality Review Team (QRT), with 80% accuracy.
- Given the trainee handout packet and other references, differentiate the most common B2 errors, with 80% accuracy.
- Given the trainee handout packet and other references, differentiate the requirements for new and material evidence, with 80% accuracy.

MOTIVATION

Time: 2 minutes

Note: Stay on

Slide 2

"…The number of Veterans awaiting decisions could grow as Service members return from ongoing conflicts and aging Veterans submit claims. According to VA, about 35% of Veterans from ongoing hostilities file claims. It is important not only that decisions be timely, but also accurate. Accurate initial claims decisions can help ensure that VA is paying disability benefits to those entitled to such benefits and also help prevent lengthy appeals."

- Excerpt from a statement by *Daniel Bertoni, Director, Education, Workforce, and Income Security Issues; U.S. Government Accountability Office; 3/24/2010*

If you have a specific situation that will encourage the trainees to participate in this program and support the implementation, please share it at this time.

LESSON REFERENCES

Time: 3 minutes

Handout 3

Slide 3

Explain where these references are located in the workplace:

- STAR Website http://vbaw.vba.va.gov/bl/21/star/star_home.htm
- M21-4, Manpower Control and Utilization in Adjudication
    - Chapter 2, Workflow Management
    - Chapter 3, Quality Assurance
    - Chapter 5, Systematic Analyses of Operations (SAO)

Slide 4

- M21-4, 3.03
- 38 CFR 3.156
- 38 CFR 3.159 (a)(1); (a)(2); & (c)(4)
- 38 CFR 3.159(c)
- 38 CFR 3.326
- 38 CFR 4.2 & 4.6
- M21-1MR Part I.1.C.7.b; III.iv.3.A.9; & III.iv.5.9
- M21-1 MR III.iv.6.C.11.a-b., III.iv.2.A.2.b.,III.iv.2.B., and III.ii.2.E.19.a-d.
- *Charles v Principi* (2002)
- *Duenas v Principi* (2004)
- *McLendon v Nicholson* (2006)
- *Jandreau v Nicholson* (2007)
- *Shade v Shinseki* (11-02-10)
- TL 02-02, TL 10-05
- 66 FR (Federal Register) 45630, 08-29-01

TOPIC SUMMARY

Time: 2 minutes

Ask the trainees if they have any questions before beginning Topic 1: Philosophy of a Quality Review Team (QRT).

TOPIC 1: PHILOSOPHY OF A QUALITY REVIEW TEAM (QRT)

CONSTRUCTIVE CRITICISM

Time: 1 minute

Handout 21

Slide 5

Inform the trainees that if they did not have an opportunity to complete the prerequisite training "Giving Constructive Criticism" lesson, a summary of the key points is located in Attachment A of the trainee handout packet. The trainees can review this information as time permits.

WELCOME MESSAGE

Time: 10 minutes

Stay on Slide 5

Inform the trainees of the following:

- They will watch an important video about the QRT program. This video is presented by VACO leadership.
- Their screens will go black while the video is loading. It will take a few minutes before they can see the VA seal.

Following the video presentation, ask for any questions, review any key information presented, and proceed to cover the information presented in this topic.

DISCUSSION

Time: 5 minutes

Ask the trainees if they have any questions about the video. Conduct a discussion as required.

INTRODUCTION

This topic will introduce the philosophy of a Quality Review Team (QRT).

TIME REQUIRED

1 hour

TOPIC OBJECTIVES/ TEACHING POINTS

Time: 1 minute

Handout 4

Stay on Slide 5

Topic objective:

- Given the trainee handout packet and references, identify the philosophy of a Quality Review Team (QRT), with 80% accuracy.

The following topic teaching points support the topic objective:

- QRT Pilot Programs
- QRT Purpose
- QRT Framework

Topic References
Time: 1 minute
Handout 4
Slide 6

The following references are applicable to Topics 1-3 in this lesson:

- STAR Website (http://vbaw.vba.va.gov/bl/21/star/star_home.htm)
- M21-4, Manpower Control and Utilization in Adjudication
  - Chapter 2, Workflow Management
  - Chapter 3, Quality Assurance
  - Chapter 5, Systematic Analyses of Operations (SAO)

QRT Pilot Programs
Time: 5 minutes
Handout 4
Slide 7

Recently, a QRT pilot program was released at various ROs. The pilot program implemented QRTs at participating ROs. The reviews conducted during the pilot targeted B2 errors.

A second pilot program (lasting three days at one RO) was conducted to analyze the In-Process Review (IPR) process. During this pilot program, three types of files were "touched" to gather reviews:

1. Touch one—cases were developed and sent back to files (review to determine if exams should have been ordered, but were not)
2. Touch two—cases were developed and VA exams were ordered (review to ensure VA examination request was correct and complete)
3. Touch three—decision-maker completed rating decision and placed it on the Power of Attorney (POA) table or Post Table (review to ensure that all development and decisions are correct)

B2 Subcategories
Time: 5 minutes
Handout 4
Slide 8

The following data was gathered at the close of the initial pilot program (June 2011-July 2011, involving 12 ROs):

- In 12 QRT pilot stations, 27.3% of B2 errors involved these B2 subcategories:
  - B2bb (VA exam was needed)
  - B2cc (VA medical opinion was needed)
  - B2f (Insufficient VA exam/medical opinion)
- **The remaining B2 subcategories equaled 6.7% of all B2 errors.

NOTES
Slide 9

Take only a moment to review Slide 9. Inform the trainees that they will have the opportunity to become familiar with the Rating Checklist at the conclusion of Day 2 training.

QRT Pilot Programs (Continued)

Time: 5 minutes

Handout 4

Slide 10

The 3-day pilot (IPR review) findings were:

- With the Back to Files category: 25 cases reviewed and 5 (20%) returned.
- With the Exam/MO Ordered category: 27 cases reviewed and 9 (33%) returned.
- With the POA/Post Tables category: 50 cases reviewed and 16 (32%) returned. Of the 16 cases, 9 were returned because an exam/MO was needed and 7 were returned because the exam/MO was insufficient for VA purposes.

QRT Purpose

Time: 5 minute

Handout 5

The Quality Review Team (QRT) will be a separate team within the regional office (RO) Veterans Service Center (VSC). The VSC will choose individuals at the RO to serve as full-time quality reviewers for the ROs.

However, to best support the facilitation of employee feedback during the In-Process Reviews (IPRs) of B2 actions, it is recommended the QRT personnel working on IPRs be placed into or within close proximity to the team they are assisting.

Slide 11

The QRT will:

- Place emphasis on “getting it right the first time” and improving station quality.
- Introduce a non-punitive review called an “In-Process Review” or an IPR. This will benefit employees greatly by providing feedback, which identifies their areas for improvement, **without calling an error!**
- Target the most error-prone trends (B2 errors).
- Continue performing Individual Performance Reviews, five cases monthly (using ASPEN).
- Perform Local Quality Reviews (End-to-End Reviews) (using the STAR database)

QRT Framework

Time: 4 minutes

Handout 5

Slide 12

The QRT is comprised of dedicated Quality Review Specialists (QRSs) whose sole purpose is to evaluate station quality, identify and train on noted error trends, and ensure Individual Performance Reviews are performed monthly.

The QRS is responsible for assisting with the implementation to help ensure that QRT implementation takes place with the intended outcome and that local management teams assemble the framework components successfully.

Training

Time: 3 minutes

Handout 5

Slide 13

All selected QRSs and coaches must attend quality reviewer training if they have not previously done so.

Once initial training is conducted following the national rollout of the QRTs, periodic training will be offered several times per year, or as needed, to accommodate new QRSs.

Additionally, because QRSs will be expected to provide training, provisions will be made for all QRSs to receive instructor training if they have not previously done so.

NOTE(S)

At this time, pause the slide presentation and allow the trainees time to answer the Check Comprehension questions, shown below. When they have answered all the questions, they should change the feedback color from green to purple in Live Meeting.

Check Comprehension

Time: 5 minutes

Handout 5

Slide 14 (Question 1)

Slide 15 (Answer 1)

Slide 16 (Question 2)

Slide 17 (Answer 2)

Activate the poll that you created.

Ask the trainees the following questions to ensure comprehension of the information that has been presented in this topic.

1. 27.3% of B2 errors involved which B2 subcategories?

   Response:
   - B2bb (VA exam was needed)
   - B2cc (VA medical opinion was needed)
   - B2f (Insufficient VA exam/medical opinion)

2. What is the purpose of the Quality Review Team (QRT)?

   Response:

   The QRT will:

   - Place emphasis on "getting it right the first time" and improving station quality.
   - Introduce a non-punitive review called an "In-Process Review" or an IPR. This will benefit employees greatly by providing feedback, which identifies areas for improvement, **without calling an error!**
   - Target the most error-prone trends (B2 errors).
   - Perform Local Quality Reviews (End-to-End Reviews) (using the STAR database).
   - Continue performing Individual Performance Reviews, five cases monthly (using ASPEN).

REVIEW

Time: 5 minutes

Review the correct responses for the Check Comprehension before proceeding to the Topic Summary.

During the discussion, share the results with the trainees (they will display anonymously).

Remediate the trainees based on the results.

TOPIC SUMMARY

Time: 5 minutes

Slide 18

Poll the trainees to determine if there are any additional questions before beginning Topic 2: Case Reviews.

Have the trainees change their feedback color to green to ensure all questions have been answered.

TOPIC 2: CASE REVIEWS

INTRODUCTION

Slide 19

This topic will describe the types of case reviews that the QRS will conduct.

TIME REQUIRED

1.5 hours

OBJECTIVES/ TEACHING POINTS

Time: 3 minutes

Handout 6

Stay on Slide 19

Topic objective:

- Given the trainee handout packet and references, identify the types of case reviews that will be conducted by the Quality Review Team (QRT), with 80% accuracy.

The following topic teaching points support the topic objective:

- Case Reviews
- Types of Reviews
- Local Quality Reviews (End-to-End Reviews)
- Training Recommendations/Corrective Actions

Case Reviews Consistency

Time: 5 minutes

Handout 6

Slide 20

During the pilot, it was determined that cases were not being pulled using the ASPEN generator. As a result, the workgroup recommended a consistent review process across the QR teams in the ROs to promote consistency, and allow for the creation and analysis of national data that can be used for local and national training.

The review process, along with an audit and appeal process, and follow-up training on error trends, will help VA reach the 98% national quality standard by 2015.

Types of Reviews

Time: 5 minutes

Handout 6

Slide 21

Within the QRT, there will be three (3) review tracks:

1. Individual Performance Reviews, five cases monthly (using ASPEN) that support local performance management requirements
2. Local Quality Reviews (End-to-End Reviews) (using the STAR database)
3. Non-punitive IPR (using STAR database) that will target specific error categories or trends (Currently B2 – Exam-Focused)

Local Quality Reviews (End-to-End Reviews)

Time: 12 minutes

Handout 6

Slide 22

STAR will provide the quality cases required for national review to the station.

Using the checklist provided by STAR and the STAR database, the following process will occur:

1. Prior to sending the cases to STAR, the QRT will perform an end-to-end review of the cases and enter the findings into the STAR database by selecting the “QRT Button” then selecting the “Local Quality Reviews Button”.
2. STAR will conduct its quality review using the same cases. This will be a “blind” review, meaning the STAR reviewer will not have access to the QRT’s findings.
3. The results will be compared by STAR staff and used to facilitate meaningful dialogue and organizational alignment.

This review will also confirm the QRT process and support better direct feedback and training using a two-way communication.

STAR Database

Time: 3 minutes

Handout 6

Slide 23

The STAR database will allow the QRS to perform:

- Local Quality Reviews (End-to-End Reviews)
- Non-punitive In-Process Reviews that will target specific error categories or trends (Currently B2-Exam Focused)
- Reporting functions

NOTE(S)

Before beginning the demonstration of the STAR database, inform the trainees of the following points:

- We are going to take a moment to show you how to access the STAR database to perform a Local Quality Review (End-to-End Review).
- In the upcoming sessions, we will discuss in further detail how to perform actual Local Quality Reviews and In-Process Reviews.
- This is just an introduction on the QRT function in the STAR database.
- Your regional office will provide you with access to the STAR database.
- Remember, this is a demonstration only – the next few images are PowerPoint slides – you will not be clicking the screen.

DEMONSTRATION

Time: 15 minutes

Handout 7/Attachment B

Slide 24-34

Prior to beginning the demonstration: Use Live Meeting to share your desktop with the trainees, which will allow them to follow along. Close or minimize any information that is not pertinent to the demonstration before sharing your desktop.

At this time, take a few moments to demonstrate the key features of the STAR database.

1. Start at the Compensation Service Intranet page and click STAR once **(Slide 24)**
2. Click STAR Database once **(Slide 25)**
3. Click Web Logon **(Slide 26)**
4. Read Warning, and then click OK **(Slide 27)**
5. Input User ID and Password, and then click Log on **(Slide 28)**
6. Click C&P STAR Checklist **(Slide 29)**
7. Click QRT **(Slide 30)**
8. At this page, click Local Quality Reviews to perform the End-to-End Reviews **(Slide 31)**
9. Click the arrow down button ▼ and select the case to perform the Local Quality Review (End-to-End Review). STAR will automatically load all the cases into this section each month. Once the case is selected, click Pending **(Slide 32)**
10. At this screen, input all necessary data and click Add Record. Then, the STAR Rating Checklist will appear. **(Slide 33)**
11. Select an answer for each category, and then click Submit. **(Slide 34)**

Reviews Outcomes

Time: 14 minutes

Handout 7

Slide 35

Consider the following:

- Reviews completed at the national level involve a comprehensive review and analysis of all elements of claims processing associated with a specific end product on completed work.
- Local Quality Reviews (End-to-End Reviews) will replicate the national level review.
- Individual Performance Reviews are conducted on specific parts of the claims process and the individual work of the employees who processed that portion of the claim.
- Creation of the QRS within a dedicated QRT with resultant data analysis, feedback, training, corrective action recommendations and post-corrective action review, and further analysis and feedback, should lessen the gap and improve all elements of claims processing. This is a critical element of the successful national implementation of the QRTs.

Training Recommendations/ Corrective Actions

Time: 13 minutes

Handout 8

Slide 36

Recommendations and corrective actions include:

- The QRT will work with the Training Manager at the RO to create and provide the specific training identified by the error trends and rating analysis.
- Training will be conducted within the month of specific recommendations.
- Training will be recorded in the TMS.
- Accountability for completion of training will be the responsibility of the Training Manager; however, the QRT will be notified that all training is completed.
- Track improvements after corrective actions are taken. Continuous monitoring is required. Increased emphasis is placed on quality reviews and training will encourage the importance of quality and continuous improvement.
- Provide positive feedback to employees if quality is improved; consider further corrective action if inconsistencies remain.
- National Quality Assurance conference will be conducted for QRS.

NOTE(S)

At this time, pause the slide presentation and allow the trainees time to answer the Check Comprehension questions, shown below. When they have answered all the questions, they should change the feedback color from green to purple in Live Meeting.

Check Comprehension *Time: 5 minutes* *Handout 8* *Stay on slide 36*	Activate the poll that you created. Ask trainees the following question: 1. What are the three review tracks within the QRT? **Response:** 1. Individual Performance Reviews, five cases monthly (using ASPEN) that support local performance management requirements 2. Local Quality Reviews (End-to-End Reviews) (using the STAR database) 3. Non-punitive IPR (using STAR database) that will target specific error categories or trends (Currently B2) (Exam Focused)
REVIEW *Time: 5 minutes*	Review the correct responses for the Check Comprehension before proceeding to the Topic Summary. During the discussion, share the results with the trainees (they will display anonymously). Remediate the trainees based on the results.
TOPIC SUMMARY *Time: 10 minutes*	Poll the trainees to determine if there are any additional questions before beginning Topic 3: Roles and Responsibilities within the Quality Review Team. Have the trainees change their feedback color to green to ensure all questions have been answered.

TOPIC 3: ROLES AND RESPONSIBILITIES WITHIN THE QUALITY REVIEW TEAM

INTRODUCTION

Slide 37

This topic will provide information about the roles and responsibilities within the QRT.

TIME REQUIRED

1.50 hours

OBJECTIVES/ TEACHING POINTS

Time: 3 minutes

Handout 9

Stay on slide 37

Topic objective:

- Given the trainee handout packet and references, identify the roles and responsibilities within the Quality Review Team (QRT), with 80% accuracy.

The following topic teaching points support the topic objective:

- QRS Role
- QRS Responsibilities
- QRT Coach Responsibilities

QRS Role

Time: 6 minutes

Handout 9

Slide 38

The QRS will conduct Individual Performance Reviews of five cases per month per employee (using ASPEN). These reviews will be completed within three business days of the QRS receiving the file. The results will be documented in ASPEN.

The QRS will also conduct Local Quality Reviews (End-To-End Reviews) of cases STAR selects for quality review at the station-level, prior to sending the cases to STAR. These reviews are non-punitive. Using a STAR checklist and the STAR database, the QRS will perform a quality review of the selected cases and the results will be compared later to the STAR review as a means of validation. This process will help confirm a valid process exists and support ongoing quality-based discussions between the local QRT and STAR staff.

The QRT will also coordinate the monthly shipment of files to STAR, and will assess files returned from STAR with errors and comments.

QRS Role (Continued)

Time: 6 minutes

Handout 9

Slide 39

The QRT will implement results of the feedback provided from Compensation Service; make specific training recommendations at the employee level to improve quality based on the results of the review; and plan, direct, and conduct training in coordination with the local Training Manager or Training Coordinator.

The QRT will also analyze local trends regarding internal remands (e.g. case returned to Pre-D because it is not ready to rate) to additionally bolster quality. At the request of an employee's supervisor, the QRT will increase the sample size.

The introduction of a new "non-punitive" quality review check is the In-Process Review (IPR). This review by the QRS will focus specifically on errors prior to the claim being adjudicated or promulgated. The first of these non-punitive IPR quality review checks will focus on the B2 error category, which focuses on errors specifically relating to exams.

QRS Responsibilities

Time: 5 minutes

Handout 10

Slide 40

QRS duties will include:

- Assisting the home station with implementation of the QRT
- Assisting with the implementation of the new IPR into the quality review process
- Helping to ensure the QRT initiatives are followed and executed with the intended outcome
- Helping to coordinate with the Training Manager to communicate responsibilities of his/her involvement in identifying or scheduling remedial or refresher training
- Completing Individual Performance Reviews (five case reviews per employee/per month), Local Quality Reviews (End-to-End Reviews), and In-Process Reviews

QRT Coach Responsibilities

Time: 5 minutes

Handout 10

Slide 41

The QRT coach is responsible for the efficient operation of the QRT and all of its responsibilities. The coach is responsible for ensuring STAR errors are tracked and corrected within 30 days per M21-4, 3.05.

The coach is also responsible for management of the random case selection process, and maintaining copies of ASPEN random-generated cases for review. Records will be kept for 3 years, or until an automated process is implemented.

QRT Coach Responsibilities (Continued)

Time: 5 minutes

Handout 10

Slide 42

Quarterly, the coach will conduct an audit comparing cases randomly selected to those actually reviewed. Bi-annually, the coach will conduct an audit of the work performed by employees versus the work reviewed to ensure that an appropriate mix of cases is being reviewed.

The coach is also responsible for completing five reviews per month for each rating/appeals QRS and each authorization QRS.

TOPIC SUMMARY

Time: 15 minutes

Slides 43-44

Review the information that has been covered and ensure the trainees understanding of the implementation of QRT, including the roles and responsibilities of team members before proceeding to the assessment.

Have the trainees change their feedback color to green to ensure all questions have been answered.

ASSESSMENT

Time: 30 minutes

Slide 45

Instruct trainees to access the registration website to take the Day 2: QRT Implementation Overview Assessment 1, which covers the philosophy of a Quality Review Team (QRT), case reviews, and roles and responsibilities within the team. For review purposes, inform trainees they can record their responses on a blank piece of paper.

NOTE(S)

Load Day 2 Assessment PowerPoint presentation.

ASSESSMENT REVIEW

Time: 15 minutes

Slide 46

Access the assessment results and review any areas of concern. Ask the trainees if they have any additional questions before beginning Topic 4: Most Common B2 Errors: Failing to Request Examinations.

Have the trainees change their feedback color to green to ensure all questions have been answered.

TOPIC 4: MOST COMMON B2 ERRORS: FAILING TO REQUEST EXAMINATIONS

INTRODUCTION *Slide 47*	This topic will provide the trainees with information about the most common B2 errors.
TIME REQUIRED	1 hour
OBJECTIVES/ TEACHING POINTS *Time: 1 minutes* *Handout 11* *Stay on Slide 47*	Topic objective: • Given the trainee handout packet and other references, differentiate the most common B2 errors, with 80% accuracy. The following topic teaching points support the topic objective: • Case Development • Most Common B2 Errors • Lay Evidence • Evidentiary Requirements
Learning Outcomes *Time: 1 minute* *Handout 11* *Slide 48*	This portion of the training will help you to gain a better understanding of: • How to Properly Evaluate Lay Evidence • When to Order Examinations & Opinions • Reduce STAR B2 Benefit Entitlement Errors

References

Time: 1 minute

Handout 11

Slide 49

Slide 50

Reference	Guidance
38 CFR 3.159 (a)(1); (a)(2); & (c)(4)	Defines medical evidence, lay evidence, and duty to assist in providing exams and opinions
38 CFR 3.326	Examinations
38 CFR 4.2 & 4.6	Interpretation of exams and evaluation of evidence
M21-1MR Part I.1.C.7.b; III.iv.3.A.9; & III.iv.5.9	When to request opinion or exam, medical opinions, and lay evidence
Charles v Principi (2002)	Medical nexus opinions (competent evidence of current disability + event in-service = VAE)
Duenas v Principi (2004)	When exam required (symptoms in-service + current disability = VAE)
McLendon v Nicholson (2006)	Low threshold for exams
Jandreau v Nicholson (2007)	Lay evidence defined (lay testimony of symptoms supports a later diagnosis)

Case Development

Time: 1 minute

Handout 12

Slide 51

Stress the following to the trainees:

- Each case must be worked on a case-by-case basis!
- Make a decision based on the whole evidence of record!

NOTE(S)

Time: 1 minute

Remind the trainees of the following:

The Non-punitive IPR (using STAR database) will target specific error categories or trends (Currently B2) (Exam Focused).

Most Common B2 Errors

Time: 1 minute

Handout 12

Slide 52

The B2 Checklist is used during the IPR review to ensure that the reviewer touches the case three times, which helps to ensure that the most common B2 errors are caught.

During claim development, the most common B2 errors occur when the following actions are done incorrectly:

- Evaluation of lay evidence
- Consideration of new and material evidence

Lay Evidence

Time: 1 minute

Handout 12

Slide 53

Per 38 CFR 3.159(a)(2), competent lay evidence means any evidence not requiring the proponent to have specialized education, training, or experience.

Lay evidence is competent if it is provided by a person who has knowledge of facts or circumstances and conveys matters that can be observed and described by a layperson.

Competent Claimant

Time: 1 minute

Handout 12

Slide 54

Per M21-1MR Part I.1.C.7.b, a claimant is competent (qualified) to describe symptoms of disability that he/she is experiencing, such as pain in the knee.

However, he/she may not be competent to diagnose one's own medical condition or offer a medical opinion.

Non-VA Sources

Time: 1 minute

Handout 12

Slide 55

When evaluating lay evidence from non-VA sources:

- Accept it at face value unless there is reason to question it, and
- Only question it if it is conflicting

Credibility Determinations

Time: 1 minute

Handout 12

Slide 56

The determination of credibility is a finding of fact. Consider consistency and plausibility.

Can VA draw a reasonable inference (a logical conclusion from premises known or assumed to be true)?

For many cases decided by VA, we are not dealing with certainty, but rather what is more likely than not the truth of what happened.

Due consideration must be given to the places, types, and circumstances of service.

Inherently Incredible Claims

Time: 1 minute

Handout 13

Slide 57

Per 38 CFR 3.159(d), VA will not provide assistance in obtaining evidence if a claim is inherently incredible or clearly lacks merit, even when the application itself is substantially complete.

DISCUSSION

Time: 3 minutes

Handout 13

Slide 58

A VSR or RVSR has the authority to determine whether a claim is incredible or without merit.

Examples:

1. A Veteran alleges service-connected tinnitus caused hammertoes, but no medical evidence to support this allegation is furnished.
2. A Veteran claims PTSD as a result of combat service in Vietnam, but military records clearly show no foreign or combat service. (M21-1MR Part III.iv.2.A.2.b)

Negative STRs

Time: 1 minute

Handout 13

Slide 59

The service records, to include a Military Occupation Specialty (MOS), of a Veteran can establish the "event" in-service if the service treatment records (STRs) themselves do not show an event occurred.

At issue then, in these types of cases, is the relationship between the in-service activities and the claimed current condition. A medical opinion should be requested on this relationship.

Example:

- A Veteran submits a claim for service connection for his right knee, noting that it is still painful after many jumps during service. STRs are negative for any right knee injury, disease, or event. However, the separation document shows he earned a Master Parachutist Badge in-service.

DISCUSSION

Time: 3 minutes

Handout 13

Slide 60

Using the example above:

What should be done if the Veteran did not mention jumping?

Response: Consider the issues raised by the Veteran or reasonably raised by the record. If the Veteran files a claim for service connection for the knee, which is inherently a statement by the Veteran alleging he/she has a disability due to an injury, disease, or event in-service, and the record shows they were a paratrooper, it is reasonably raised from the record that the knee problem may be due to the nature of such service.

Combat Veterans

Time: 1 minute

Handout 13

Slide 61

Per 38 CFR 3.304(d), satisfactory lay or other evidence that an injury or disease was incurred or aggravated in combat will be accepted as sufficient proof of service connection if the evidence is consistent with the circumstances, conditions, or hardships of such service even though there is no official record of such incurrence or aggravation. *Authority: 38 U.S.C. 1154(b)*

DISCUSSION

Time: 3 minutes

Slide 62

Before discussing the next section, ask the trainees the following question:

> Does service solely in a general combat area or combat zone apply?

NOTE(S)

Allow the trainees to consider the question above. No answer is required at this time.

Combat Area/Combat Zone

Time: 1 minute

Handout 13-14

Slide 63

The Federal Circuit held that the term "engaged in combat with the enemy" in 38 U.S.C. § 1154(b) requires that a Veteran have personally participated in events constituting an actual fight or encounter with a military foe or hostile unit or instrumentality, as determined on a case-by-case basis.

Service in a general "combat area" or "combat zone" is insufficient to trigger the evidentiary benefit of section 1154(b). *Moran v Peake; May 2, 2008*

Slide 64

General Counsel Precedent Opinion, VAOPGCPREC 12-99, dated October 18, 1999, states "The phrase "engaged in combat with the enemy" requires that the Veteran have personally participated in events constituting an actual fight or encounter with a military foe or hostile unit or instrumentality."

Combat Veterans—Opinion Not Required

Time: 1 minute

Handout 14

Slide 65

A combat Veteran's uncorroborated statement concerning how a particular injury was sustained in combat is proof of in-service occurrence if the:

- Statement is consistent with the circumstances, conditions, or hardships of such service
- Current condition is obviously a combat injury, such as residuals of a gunshot wound

DISCUSSION

Time: 3 minutes

Handout 14

Slide 66

Conduct a discussion using the statement below to ensure the concept of "a medical opinion relating that injury to combat service is not necessary" has been understood. Provide an additional example if needed.

A medical opinion relating the injury to combat service is not necessary.

Example:

A Veteran submits a claim for service connection for right arm bullet wound sustained during the Gulf War. STRs are negative for any bullet injury, and they are negative for any right arm event, injury, or disease. However, the separation document shows he was awarded a Combat Infantryman Badge and a Purple Heart medal, and he served in Iraq during the Gulf War.

Combat Veterans—Opinion Required

Time: 1 minute

Handout 14

Slide 67

In other claims, where the combat Veteran's statement establishes that he/she suffered a less specific event or injury in-service, such as a twisted ankle from a fall, a nexus opinion is needed to relate the claimed current condition to combat during military service.

DISCUSSION

Time: 3 minutes

Handout 14

Slide 68

Discuss the following example:

Example:

A Veteran submits a claim for service connection for low back pain sustained while diving into a foxhole during a fire-fight in the Gulf War. STRs are negative for any thoracolumbar spine event, injury, or disease. However, the separation document shows he was awarded a Combat Infantryman Badge and served in Iraq during the Gulf War.

NOTE(S)

At this time, pause the slide presentation and allow the trainees time to answer the Check Comprehension questions, shown below. When they have answered all the questions, they should change the feedback color from green to purple in Live Meeting.

Check Comprehension

Time: 5 minutes

Handout 14

Activate the poll that you created.

Ask the trainees the following questions:

1. What claim development action should happen for the following scenario? Why?

   A Veteran submits a claim for service connection for hearing loss noting acoustic trauma in-service. STRs are negative for any threshold shift or diagnosis of hearing loss by VA standards. However, the separation document shows he was a jet mechanic in-service.

   Response: A medical opinion should be requested.

2. What claim development action should happen for the following scenario? Why?

   A Veteran submits a claim for service connection for left ankle pain noting he twisted his left ankle from a fall during a fire fight. STRs are negative for any injury or treatment of the left ankle. However, the separation document shows he earned a Combat Infantrymen Badge (CIB).

   Response: The combat Veteran's statement establishes that he suffered a less specific event or injury in-service. A nexus opinion is needed to relate the claimed current condition to combat during military service.

REVIEW

Time: 2 minutes

Review the correct responses for the Check Comprehension before proceeding to the Topic Summary.

During the discussion, share the results with the trainees (they will display anonymously).

Remediate the trainees based on the results.

If required, have the trainees change their feedback color from green to purple.

Evidentiary Requirements

Time: 1 minute

Handout 15

Slide 69

In claims for compensation, the evidence must show:

- Current disability (either by diagnosis or lay statement)
- In-service event
- Link (or nexus)

Current Disability
Time: 1 minute
Handout 15
Slide 70

The evidence must contain competent medical evidence that the claimant has a current disability. Competent medical evidence:

- Comes from a person who is qualified by education, training, or experience to offer medical diagnoses, statements, or opinions
- Conveys sound medical principles found in medical treatises or writings

Slide 71

Or the claim must contain competent lay evidence that the claimant has persistent or recurrent symptoms of disability. This evidence is provided by a person who:

- Has knowledge of facts and circumstances and conveys matters that can be observed by a layperson
- Is not required to have specialized education, training, or experience

38 CFR 3.159(c)(4)(A)
Time: 1 minute
Handout 15
Slide 72

Based on 38 CFR 3.159(c)(4)(A):

- Is there sufficient evidence to raise a reasonable possibility that the Veteran has the disability in question? At first, the lay statement requires no weighing of facts, only an assessment that the evidence is competent.
- Does the claimed issue have features that are capable of lay observation? (competent) (plainly visible or audible—e.g., audiological disabilities, something affecting the skin, headaches, orthopedic, muscle, psychiatric symptoms {mood changes}, pain).

DISCUSSION
Time: 3 minutes
Slide 73

Conduct a discussion with the trainees to ensure the information presented in the example above has been understood. Provide an additional example if required.

Example:

If a Veteran is claiming service connection for a right knee disorder with pain, and his right knee was treated in-service (even if only on one occasion), an examination with opinion is warranted.

In-Service Event
Time: 1 minute
Handout 15
Slide 74

And, the claim must contain supporting evidence from service records or other sources that the Veteran suffered an event(s), injury, or disease in-service.

An event is defined as one or more incidents associated with places, types, and circumstances giving rise to disability.

38 CFR 3.159(c)(4)(B)

Time: 1 minute

Handout 16

Slide 75

Based on 38 CFR 3.159(c)(4)(B):

- Lay statements relating to 3.309, 3.313, 3.316 (presumptive, Republic of Vietnam (RVN), mustard gas) should be utilized. However, a Veteran would not be able to self-diagnose a malignant tumor. This requires a biopsy or other testing.
- Competent evidence is defined as including non-medical signs, indicators, and symptoms (3.317 (Gulf War (GW)). If there is any doubt whether the Veteran has a known clinical diagnosis of the disability in question, a VA examination may be appropriate.
- An examination may be warranted any time there is a GW claim for functional gastrointestinal disorders, chronic fatigue syndrome, fibromyalgia, or irritable bowel syndrome, given their listing in 3.317(a)(2).

Link

Time: 1 minute

Handout 16

Slide 76

A link indicates that the claimed disabilities or symptoms may be associated with the established event, injury, or disease in-service.

NOTE(S)

Time: 1 minute

Reinforce to the trainees:

- VA's system of claims adjudication is non-adversarial
- Maintain objectivity

38 CFR 3.159(c)(4)(C)

Time: 1 minute

Handout 16

Slide 77

Based on 38 CFR 3.159(c)(4)(C):

- The threshold for determining whether there is an indication that the disability in question may be associated with service or with another service-connected disability is low (*McLendon v Nicholson).*
- A determination cannot be made that lay evidence lacks credibility merely because it is unaccompanied by contemporaneous (coexisting) medical evidence (*Buchanan v Nicholson*).

Examination with Medical Opinion

Time: 1 minute

Handout 16

Slide 78

A VA examination with a medical nexus opinion should be requested once the:

- Record contains competent lay or medical evidence of a current diagnosed disability or symptoms of disability
- Evidence establishes that an event, injury, or disease in-service was suffered
- Evidence indicates it may be associated with the event, injury, or disease in-service

NOTE(S)	At this time, pause the slide presentation and allow the trainees time to answer the Check Comprehension questions, shown below. When they have answered all the questions, they should change the feedback color from green to purple in Live Meeting.
Check Comprehension *Time: 2 minutes* *Handout 16*	Read the following scenario and ask trainees the following question. **Scenario:** A Veteran's STRs show he fell and bruised his lower back several years ago in-service. He submits a claim for service connection for a back disorder noting that his back is painful. Would you ask for a medical opinion? Why or why not? **Response:** Yes. A medical opinion is needed to decide the issue. The Veteran had an injury in-service and he is competent to state that his back is presently painful. Competent lay evidence of persistent or recurrent symptoms of a disability that may be associated with an established injury in-service is of record. The low threshold for an examination with opinion has been met.
DISCUSSION *Time: 3 minutes* *Slide 79*	Discuss the example shown above.
TOPIC SUMMARY *Time: 5 minutes* *Slide 80*	Poll the trainees to determine if there are any additional questions before beginning Topic 5: New and Material Evidence. Have the trainees change their feedback color to green to ensure all questions have been answered.

TOPIC 5: QUALITY REVIEW: NEW AND MATERIAL EVIDENCE

INTRODUCTION

Time: 1 minute

Slide 81

This topic will provide the trainees with information about the most common B2 errors.

TIME REQUIRED

1.25 hour

OBJECTIVES/ TEACHING POINTS

Time: 2 minutes

Handout 17

Stay on Slide 81

Topic objective:

- Given the trainee handout packet and other references, differentiate the requirements for new and material evidence, with 80% accuracy.

The following teaching points support the topic objective:

- New and Material Evidence Regulations
- Definitions
- Two Step Analysis
- 38 CFR 3.310(a)
- Development
- New and Material Cases
- Federal Register (08-29-01)
- Shade v Shinseki (11-02-10)

Learning Outcomes

Time: 1 minute

Handout 17

Slide 82

This portion of the training will help you to gain a better understanding of:

- How to apply the new and material standard
- What to include in the rating to ensure it clearly informs the claimant
- When to concede the evidence is new and material if in doubt
- How to make decisions based on merits of the case

References

Time: 2 minute

Slide 83

- 38 CFR 3.156
- 38 CFR 3.159(c)
- M21-4, 3.03
- M21-1 MR III.iv.6.C.11.a-b., III.iv.2.A.2.b., III.iv.2.B., and III.ii.2.E.19.a-d.
- TL 02-02, TL 10-05
- 66 FR (Federal Register) 45630, 08-29-01
- *Shade v Shinseki* (11-02-10)

New and Material Evidence Regulation

Time: 2 minute

Handout 17

Slide 84

Once a claim has been finally denied, it cannot be reopened unless new and material evidence is received.

Definitions

Time: 2 minutes

Handout 17

Slide 85

New evidence is evidence that has not previously been considered.

Material evidence is evidence that by itself, or when considered with previous evidence of record, relates to an unestablished fact necessary to substantiate the claim.

New Evidence

Time: 2 minute

Handout 17

Slide 86

Remind the trainees:

New evidence must not be cumulative of evidence at the time of the last denial.

Two Step Analysis

Time: 3 minutes

Handout 17

Slide 87

Is the evidence new & material?

If so, the evidence must be assessed, in the context of the other evidence or record, & new factual determinations must be made. *Manio v Derwinski (2-15-91)*

VCAA Notification

Time: 3 minutes

Handout 17

Slide 88

B1 Category—Was VCAA pre-decision "notice" provided and adequate?

The following apply:

- New & Material language is only required if the previous "merits" denial is final.
- If a new contention relating to causation is raised (i.e. presumptive s/c), the letter must also address the new contention.
- Failing to notify the claimant of any information necessary to substantiate the claim is contrary to the VA's "Duty to Assist".

Case Development

Time: 2 minutes

Handout 17

Slide 89

B2 Category—Does the record show development to obtain all indicated evidence (including a VA exam, if required) prior to deciding the claim?

Evidence

Time: 3 minutes

Handout 18

Slide 90

Per 38 CFR 3.159(c) (4) (iii), a finally adjudicated claim can be reopened only if new and material evidence is presented or secured.

Per M 21-1 MR III.ii.2.E.19.c., examples of evidence includes testimony, to include:

- Statements
- Contentions and arguments
- Documentary proof
- Medical exams or reports
- Other material not previously considered

Federal Register (08-29-01)

Time: 5 minutes

Handout 18

Slide 91

VA imposes some limits on the expenditure of its finite resources in subsequent efforts to assist a claimant substantiate a claim after it has once made reasonable efforts to assist and the evidence failed to substantiate the claim. Nevertheless, Sec. 3.159(c)(4)(iii) has been revised to clarify that VA will consider providing an exam or obtaining a medical opinion only if new and material evidence is already presented or secured.

VA may certainly schedule examinations in circumstances other than those set forth in this regulation; section 5103(g) states that VA may provide more assistance than required by statute. This regulation sets the floor, not the ceiling for VA assistance in providing medical examinations or obtaining medical opinions.

Federal Register (08-29-01) (Continued)

Time: 2 minutes

Handout 18

Slide 92

We believe it is fair and reasonable to apply the same standard, that there be a reasonable possibility that VA assistance would help substantiate the claim, in determining whether a claim has been reopened, triggering VA's full duty to assist by providing a VA examination or obtaining a medical opinion.

***Shade v Shinseki* (11-02-10)**

Time: 3 minutes

Handout 18

Slide 93

The court:

- Ruled that there is a low threshold for reopening a claim
- Noted that VA's stated purpose in amending the regulations in 2002 was to provide clarity and consistency. Erecting a new barrier to reopen would be inconsistent with VA's own asserted purpose.

Reopening a PTSD Claim

Time: 3 minutes

Handout 18

Slide 94

VA will accept a Veteran's lay statement (either new or previous) regarding an in-service stressor—"fear of hostile military or terrorist activity"—as sufficient to constitute new and material evidence for the purpose of reopening a previously denied claim if the Veteran's record otherwise shows service in a location involving exposure to "hostile military or terrorist activity."

Procedural Deficiencies—Not Outcome-Related

Time: 3 minutes

Handout 19

Slide 95

Procedural deficiencies that are not outcome related, are covered in the following categories:

- E1 Category - Was all pertinent evidence discussed?
- E2 Category - Was the basis of each decision identified and each denial explained?

Pertinent Evidence

Time: 2 minutes

Handout 19

Slide 96

Pertinent evidence includes:

- Rating(s) which previously denied the claim
- Claimants contentions
- Any other evidence that is relevant & necessary to the determination

TL 02-02

Time: 1 minute

Handout 19

Slide 97

TL 02-02 notes that the purpose of a rating document is to communicate the decision we have made and why we made it to the claimant and his or her representative.

Appendix Guidance

Time: 4 minutes

Handout 19

Slide 98

TL 02-02 Appendix B guidance:

- Discuss only the pertinent evidence
- Concisely summarize relevant facts
- Note the claimant's contentions
- Provide a clear and succinct statement concerning your decision
- Incorporate the pertinent evidence directly into the statement explaining the decision
- Use lay language whenever possible
- Refrain from professional jargon or insider language

Additional New and Material Evidence STAR Checklist Deficiency Comments

Time: 7 minutes

Handout 19

Slide 99

Additional STAR Checklist deficiency comments are recorded in the following categories:

- F2 Category - Was the notification correct?
- J2 Category - Disability Determination (related comment)
- J3 Category - Notification (related comment)

NOTE(S)

At this time, pause the slide presentation and allow the trainees time to answer the Check Comprehension questions, shown below. When they have answered all the questions, they should change the feedback color from green to purple in Live Meeting.

Check Comprehension

Time: 10 minutes

Handout 19

Slide 100

Activate the poll that you created.

Ask the trainees the following questions:

1. Per 38 CFR 3.159(c) (4) (iii), under what circumstances can a finally adjudicated claim can be reopened?

   Response: If new and material evidence is presented or secured.

2. Under what circumstance will VA accept a Veteran's lay statement regarding an in-service stressor –"fear of hostile military or terrorist activity"– as sufficient to constitute new and material evidence for the purpose of reopening a previously denied claim?

   Response: If the Veteran's record otherwise shows service in a location involving exposure to "hostile military or terrorist activity".

REVIEW

Time: 2 minutes

Review the correct responses for the Check Comprehension before proceeding to the Topic Summary.

During the discussion, share the results with the trainees (they will display anonymously).

Remediate the trainees based on the results.

TOPIC SUMMARY

Time: 10 minutes

Handout 20

Slide 101

Key points related to new and material evidence include:

- The new and material standard should be liberally applied and not used merely as an efficient way to dispose of a claim.
- Ratings should clearly inform claimants, in simple language, why the evidence is **NOT** new and material.
- When in doubt, concede the evidence is new and material and make a decision based on the merits of the case.

Poll the trainees to determine if there are any additional questions before beginning Topic 5: New and Material Evidence.

Have the trainees change their feedback color to green to ensure all questions have been answered.

EXERCISE

TIME REQUIRED 0.50 hours

NOTE(S) Inform the trainees, that they should take about 15 minutes to review each checklist. This review will prepare them for Day 3 discussions.

CHECKLISTS
Slide 102

In preparation for the upcoming discussions on Day 3, review the following checklists:

- STAR Rating Quality Review Checklist (Attachment C)
- STAR Authorization Quality Review Checklist (Attachment D)
- Exam-Focused In-Process Review (IPR) Checklist (Currently B2) (Attachment E)

LESSON REVIEW AND WRAP-UP

INTRODUCTION

The Quality Review Team Implementation lesson is complete.

Review each lesson objective and ask the participants for any questions or comments.

TIME REQUIRED

0.75 hours

LESSON OBJECTIVES

Slide 103

You have completed the QRT Implementation Overview lesson.

The trainee should be able to:

- Given the trainee handout packet and references, identify the philosophy of a Quality Review Team (QRT), with 80% accuracy.
- Given the trainee handout packet and references, identify the types of case reviews that will be conducted by the Quality Review Team (QRT), with 80% accuracy.
- Given the trainee handout packet and references, identify the roles and responsibilities within the Quality Review Team (QRT), with 80% accuracy.

LESSON OBJECTIVES (CONTINUED)

Slide 104

You have completed the QRT Implementation Overview lesson.

The trainee should be able to:

- Given the trainee handout packet and other references, differentiate the most common B2 errors, with 80% accuracy.
- Given the trainee handout packet and other references, differentiate the requirements for new and material evidence, with 80% accuracy.

CONCLUSION

Conclude Day 2 by reminding the trainees of the start time for Day 3. Also remind trainees to download any required materials from the QRT website before coming to the next session.

Also, remind trainees to take the TMS daily survey. TMS numbers are at the bottom of the QRT Getting Started Page. These surveys should be automatically loaded into TMS.

THE END

Slide 105

This ends Day 2 training.