

# **Disability Exam and Assessment Program Clinician User Interface**

## **User Guide**



**September 2016**

**Department of Veterans Affairs  
Office of Information and Technology (OI&T)**

## Revision History

NOTE: The revision history cycle begins once changes or enhancements are requested after the document has been baselined.

Date	Revision	Description	Author
09/14/16	0.1	Initial draft	TeamSMS

## Artifact Rationale

Per the Veteran-focused Integrated Process (VIP) Guide, the User's Guide is required to be completed prior to Critical Decision Point #2 (CD2), with the expectation that it will be updated as needed. A User Guide is a technical communication document intended to give assistance to people using a particular system, such as VistA end users. It is usually written by a technical writer, although it can also be written by programmers, product or project managers, or other technical staff. Most user guides contain both a written guide and the associated images. In the case of computer applications, it is usual to include screenshots of the human-machine interfaces, and hardware manuals often include clear, simplified diagrams. The language used is matched to the intended audience, with jargon kept to a minimum or explained thoroughly. The User Guide is a mandatory, build-level document, and should be updated to reflect the contents of the most recently deployed build. The sections documented herein are required if applicable to your product.

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# 1. Introduction

## 1.1. Purpose

The purpose of this guide is to familiarize users with the important features and navigational elements of the Disability Exam and Assessment Program (DEAP) Clinician User Interface (CUI).

### 1.1.1. Disclaimers

#### 1.1.1.1. Software Disclaimer

*This software was developed at the Department of Veterans Affairs (VA) by employees of the Federal Government in the course of their official duties. Pursuant to title 17 Section 105 of the United States Code this software is not subject to copyright protection and is in the public domain. VA assumes no responsibility whatsoever for its use by other parties, and makes no guarantees, expressed or implied, about its quality, reliability, or any other characteristic. We would appreciate acknowledgement if the software is used. This software can be redistributed and/or modified freely if any derivative works bear some notice that they are derived from it, and any modified versions bear some notice that they have been modified.*

#### 1.1.1.2. Documentation Disclaimer

*The appearance of external hyperlink references in this manual does not constitute endorsement by the Department of Veterans Affairs (VA) of this Web site or the information, products, or services contained therein. The VA does not exercise any editorial control over the information you may find at these locations. Such links are provided and are consistent with the stated purpose of the VA.*

### 1.1.2. Documentation Conventions

This manual uses several methods to highlight different aspects of the material.

Descriptive text is presented in a proportional font (as represented by this font).

User's responses to online prompts (e.g., manual entry, clicks, etc.) will be boldface type.

## 2. System Summary

CUI is a web-based system that facilitates the data gathering, documentation continuity, and workflow efforts for of the Department of Veterans Affairs (VA) disability evaluation and assessment process. The system provides the following:

- A clinical workflow system enabling healthcare professionals to provide comprehensive, timely, and quality patient medical evaluations in support of disability determination and the Veterans Benefits Administration (VBA) adjudication processes.
- Real-time access to a comprehensive clinical workflow system that assists VA and non-VA clinicians, by supporting a customizable clinical protocol based examination tailored to each individual Veteran's claimed disability conditions.
- A system to collect clinical data and automatically submit focused patient information to the assigned adjudicator(s), in order to expedite current claims and reduce the backlog of Veteran claims awaiting adjudication.
- Integration with Veterans Benefits Management System (VBMS) and Data Access Service (DAS).

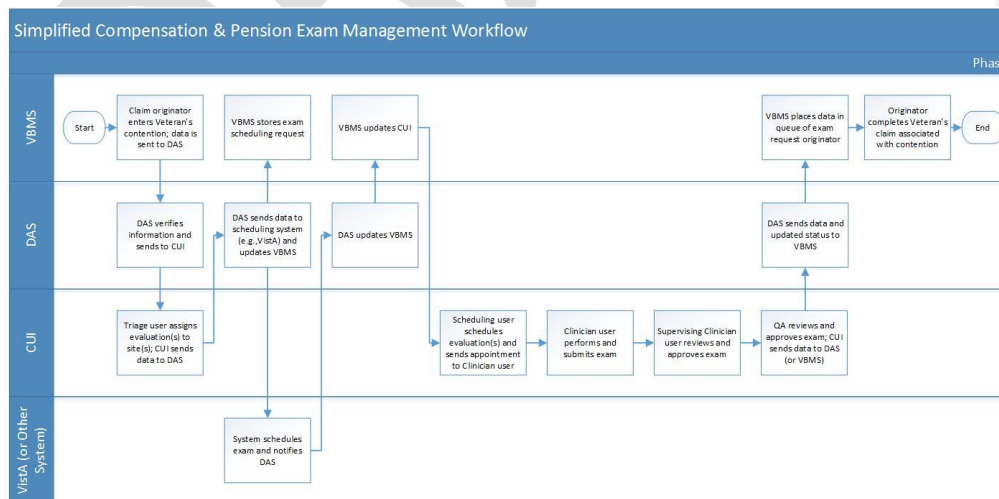
### 2.1. System Configuration

CUI users require a computer that provides access to the VA network as well as login credentials (typically a VA user name, password and PIV card).

### 2.2. Data Flows

Figure 1 provides a high-level, simplified diagram showing how CUI integrates with other systems in the disability evaluation and assessment process.

**Figure 1: Disability Evaluation and Assessment Program Data Flow Diagram**



## 2.3. User Roles

User roles are defined as responsibilities or privileges for various users of the system and are associated with an action that can be performed within the CUI system. CUI implements internal functionality by determining if a user has the responsibility or privilege to perform a certain action based on that user's role(s).

## 2.4. User Access Levels

CUI provides six user roles associated with specific privileges and a specific site (or sites) as well as an Application Administrator user role with privileges for all sites. For all user roles, a user's privileges define the areas of the system that a user can access—and how elements in those areas appear—as well as the operations a user can perform within those areas. The following table provides more details.

**Table 1. User Roles and Privileges**

User Role	Privileges
Application Administrator	Create new user(s) Perform site administration <ul style="list-style-type: none"><li>○ Add/delete sites (create and deactivate)</li><li>○ Define Veteran Service Organization (VSO)</li><li>○ Add/delete contract exam provider</li></ul>
Site Administrator	Add an existing CUI user to a site Update the site profile Update user roles (privileges) View user requests for site access
Triage	Add/update/cancel CUI evaluation Request re-work (clarification, additional information) from VBA Reassign an exam request and/or evaluation to another site Update/assign an exam request and/or evaluation to an examining clinician Upload/add attachments
Scheduling	Determine whether an exam can be performed at the assigned location Create linked requests as needed Add linked exam request Update/assign/schedule exams Upload/add attachments
Clinician	Complete exam and CUI evaluation Add/update/cancel linked CUI evaluations Add/update/cancel contention Add/update/cancel exam Upload/add attachments
Supervisory Clinician	Verifies information included in exam results; ensures information is complete and accurate for the VBMS Ratings Calculator Responsible for sending final exam results to VBMS for rating
Quality Assurance (QA)	Review completed CUI evaluations and associated exam requests



## 3. Getting Started

This section provides a general introduction to CUI from signing in to the system to a description of the landing page.

### 3.1. First-Time Sign In

Before signing in to CUI for the first time, make sure you have access to the VA network and one of the following 1) VA user ID and password, 2) PIV card, or 3) GFE for Windows authentication. To sign in to CUI, complete the following steps:

1. Log in to the VA network.
2. Open your web browser to: [https://vhacdwdwhcto3.vha.med.va.gov/users/sign\\_up](https://vhacdwdwhcto3.vha.med.va.gov/users/sign_up)

The system displays the following:

**Figure 2. CUI Sign-in Page**

VA Clinician User Interface

You need to sign in before continuing.

You are accessing a U.S. Government information system. This information system is provided for U.S. Government-authorized use only. Unauthorized or improper use of this system may result in disciplinary action, as well as civil and criminal penalties. Use of this system may be monitored.

Sign in

Email

Password

☐ Remember me

Log in

[Forgot your password?](#)

[Didn't receive unlock instructions?](#)

[Sign in with SAML](#)

3. Click the **Sign in with SAML** button. The system displays the following:

**Figure 3. SAML Page**



4. Make sure your PIV card is inserted in your card reader and click the Sign In link. The system displays a landing page explaining that the application administrator will receive your request and determine your eligibility for use of the CUI application.
5. After your eligibility is granted, you will receive an email. Open a web browser to the link in the email and sign in to CUI using your PIV card. The system displays a page allowing you to request access to a working site and your desired roles for the working site:

**Figure 4. Select Working Site Page**

6. To request a working site, click **You don't have access to ANY sites presently** to expand a list of working sites, click the appropriate site, and then click **Select**. **Note:** Sites are listed in alphabetical order. The drop-down list allows you to type in the first few letters of the site name to narrow and speed up your search.

7. To request roles for the site, click the appropriate check box(es) under **Select desired roles for this site** and then click **Submit**. The system notifies the Site Administrator of your request. After the Site Administrator grants site access and the appropriate role(s), the system will send you an email confirmation.

**Note:** Until you receive the confirmation email, you will be able to sign in to CUI, but you will not be able to complete any work.

## 3.2. CUI Dashboard

After signing in to CUI, the system displays a dashboard or home page with the following elements:

- Sign in status message in the upper left
- Center function display
- Your name with a drop-down **My Sites** menu in the upper right that allows you to access a menu of options for your role (see Table 2)
- **Sign out** button in the upper right
- The name of your current working site (if you have one assigned and are signed in)
- Status of your pending work

Figure 5 shows a sample landing page—or dashboard—for a Triage user.

Figure 5. Triage User Dashboard

VA Clinician User Interface

Sign out


### CUI Dashboard

Triage - Examination Requests:

Veteran Name	File Number	Site	
[REDACTED]	[REDACTED]	Texas Medical Center	<a href="#">Take action</a>
[REDACTED]	[REDACTED]	Texas Medical Center	<a href="#">Take action</a>
[REDACTED]	[REDACTED]	Texas Medical Center	<a href="#">Take action</a>
[REDACTED]	[REDACTED]	Texas Medical Center	<a href="#">Take action</a>

Triage - Pending Examinations:

Veteran Name	Contention	State	Associated Site	Clinician	
[REDACTED]	Very severe joint pain	Pending	Texas Medical Center		<a href="#">Take action</a>
[REDACTED]	Very severe joint pain	Pending	Texas Medical Center		<a href="#">Take action</a>
[REDACTED]	Very severe joint pain	Pending	Texas Medical Center	Texas Medical Center Clinician User 1	<a href="#">Take action</a>

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[? Help](#)

The role menus are customized with the options appropriate for your role. To see your role menu, click your name, click My Sites, and click the name of a site that you have access to. Role menus with their options are shown in Table 2. Menu Options by User

Table 2. Menu Options by User Role

User Role	Customized Menu Options
Application Administrator	<div>Application Admin</div> <div>All CUI Users</div> <div>Profiles &amp; Roles</div> <div>Add New User</div> <div>Sites</div> <div>Add New Site</div> <div>Access Requests</div>

User Role	Customized Menu Options
Site Administrator	<div>Site Administrator</div> <div>Site Profile</div> <div>Site Users</div> <div>User Profiles</div> <div>Access Requests</div>
Triage, Scheduling, Clinician, Supervisory Clinician, Quality Assurance	<div>Site User</div>

### 3.3. Request Access to Additional Sites

At any time after obtaining CUI authorization, you may request access to an additional working site(s) by completing the following steps:

1. From your home page, click the **Request access to a site** button. The system displays the Select Your Working Site page.
2. Under “Request access to additional sites” click **Select a Site** to expand a drop-down list of working sites; select the additional site you need access to, and click **Select**.

**Note:** Sites are listed in alphabetical order. The drop-down list allows you to type in the first few letters of the site name to narrow and speed up your search.

The system notifies the Site Administrator of your request. After the Site Administrator grants site access and the appropriate role(s), the system will send you an email confirmation.

3. Request the appropriate user role for the new site you selected in Step 2 using steps in Section 3.4, “Request a User Role on a Site.”

### 3.4. Request a User Role on a Site

At any time after obtaining CUI authorization and access to a specific working site, you may request access for an additional user role by completing the following steps:

1. From your home page, click **Request access to a site**. The system displays the Select Your Working Site page.
2. Under “Request access to additional sites” select the location you want to request an additional user role for.

**Note:** Sites are listed in alphabetical order. The drop-down list allows you to type in the first few letters of the site name to narrow and speed up your search.

3. Under “Select desired roles for this site,” click the check box(es) for the role(s) you want authorization for and then click **Submit**.

As a result, the system notifies the Site Administrator of your request. After the Site Administrator authorizes the requested role(s), the system will send you an email confirmation.

### 3.5. Backward Compatibility

*Placeholder for a section telling current users of CUI things like: they need go through the SSO login steps now, how to get to new full-body evaluations, etc.*

#### 3.5.1. Overview

Much of the interface and functionality for CUI changed between release 1.0 and release 2.0. Because of this, users must transition to new user roles, processes, and functionality. If you used CUI version 1.0, going forward you must review or complete steps in the following sections of this manual:

Background knowledge:

- Section 2.2: Data Flows
- Section 2.4: User Access Levels
- Section 3.1: First-Time Sign In

#### 3.5.2. Find an Existing Evaluation

Evaluations and exams that were started in CUI release 1.0 can be accessed after you have completed the First-Time Log In steps and have been assigned a site and user role.

1. TBD

Figure 6. Clinician Dashboard

VA Clinician User Interface


Malar Nachi | Sign out

Signed in!

All claims (3)

Patient name	SSN	Claim summary	Date
CHRIS POW	XXX-XX-	PATELLOFEMORAL PAIN SYNDROME, RIGHT KNEE, STATUS POST PARTIAL MENISCECTOMY AND SURGICAL SCARS; LIMITATION AND PAINFUL MOTION OF THE KNEE ASSOCIATED WITH PATELLOFEMORAL PAIN SYNDROME, RIGHT KNEE, STATUS POST PARTIAL MENISCECTOMY AND SURGICAL SCARS, LEFT KNEE STRAIN ASSOCIATED WITH PATELLOFEMORAL PAIN SYNDROME, RIGHT KNEE, STATUS POST PARTIAL MENISCECTOMY AND SURGICAL SCARS, LUMBOSACRAL STRAIN ASSOCIATED WITH PATELLOFEMORAL PAIN SYNDROME, RIGHT KNEE; STATUS POST PARTIAL MENISCECTOMY AND SURGICAL SCARS, Test	2016-04-20
Stacey Veteran	XXX-XX-4444	ringing in my ears, knee buckles, can't sleep at night	2016-06-17
Joe Veteran	XXX-XX-4857	Elbow, Sprint 10	2016-06-17

+ Create new claim

 Department of Veterans Affairs

2 Help

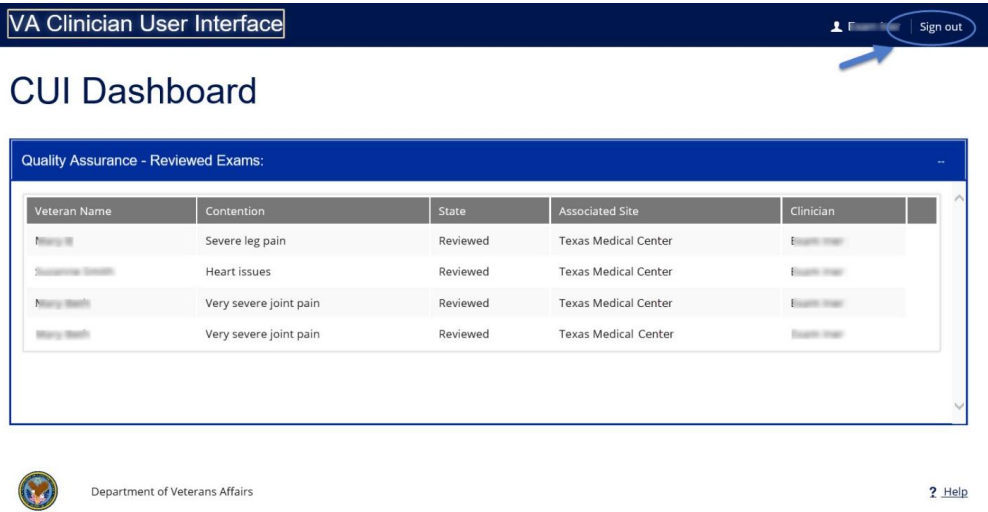
### 3.6. Change User ID and Password

TBD

### 3.7. Exit System

To exit CUI, be sure to complete any tasks or save any data you’ve entered, and then click **Sign out** in the upper right of any page.

Figure 7. Sign Out



## 4. User and Site Administration

### 4.1. Application Administrator Procedures

#### 4.1.1. Grant CUI Access to a New User

The Application Administrator is the only role that can grant CUI access to new users. When a user requests access to CUI for the first time, they sign in to CUI using the steps in the “First-Time Sign In” section and the system will generate an email to you requesting access. Open the email and complete the following steps:

1. Visit the URL in the email. The system displays a CUI sign-in page.
2. Enter your CUI Application Administrator login and password. The system displays an Access Request page similar to the following:

Figure 8. Grant/Deny Access Request Page

VA Clinician User Interface

### Access Request

Requested access on: June 03, 2016

Field	Value
Name:	[Redacted]
E-mail Address:	[Redacted]@va.gov
Authorization Status:	pending
Date of Access Request:	June 03, 2016 @ 15:17 UTC

[Deny Access](#) [Grant Access](#)

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3. If you have evidence that the user request is valid, click **Grant Access**.
4. Verify your work as follows:
  - a. Select **All CUI Users**.
  - b. Ensure that the new user’s name appears in the list of All CUI Users.

**Note:** Before the new user can perform or complete work in CUI, they must be assigned to a site and role. These tasks are done by the Site Administrator.

The Application Administrator can also create a new user without the user signing into CUI and generating an email request for access. The Application Administrator must have the user’s first name, last name, email address and evidence of authorization before completing the following steps:

1. Sign in to CUI as an Application Administrator.



- From the “Application Admin” menu in the upper right, select **Add New User**. The system displays the following page:

**Figure 9. Add New CUI User Page**

VA Clinician User Interface

J. Smith | Application Admin | Sign out

## Add New CUI User

New User

Field	Value
First Name:	<input type="text"/>
Last Name:	<input type="text"/>
E-mail Address:	<input type="text"/>
Password:	<input type="password"/>

Create User

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- Ensure that you have evidence of the user’s right to use CUI.
- Add the new user’s first name, last name, and email address; create a password and then click **Create User**.
- Verify your work as follows:
  - Select **All CUI Users**.
  - Ensure that the new user’s name appears in the list of All CUI Users.

**Note:** Before the new user can perform or complete work in CUI, they must be assigned to a site and role. These tasks are typically done by the Site Administrator.

#### 4.1.2. Update or Remove User Roles (Privileges)

An Application Administrator can update or remove user roles at all sites.

**Note:** An Application Administrator can remove all roles for a user; however, this does not remove the user from CUI completely. The user will still be able to sign in to CUI, but will not be able to perform any tasks related to a site.

To update user roles, make sure you’re logged in as an Application Administrator and complete the following steps:

- From the Application Administrator menu, select **All CUI Users**.
- Select the user for whom you want to update roles.

3. Under “Choose a Site to add roles for user name,” click **Select a Site** and then select an appropriate site. The system displays the user’s information and current roles at the selected site.
4. Select or deselect the appropriate role(s) for the user (Administrator, Triage, Scheduling, Clinician, Supervisory Clinician, Quality Assurance) and then click **Update Roles**.
5. Verify your work as follows:
  - a. From the Application Administrator menu, select **All CUI Users**.
  - b. Select the site you assigned to the new user.
  - c. Select the new user name and ensure the appropriate roles appear.

#### **4.1.3. Create a New Site**

The Application Administrator is the only role that can create a new site. To create a new site, complete the following steps.

1. From the Application Admin menu, select **Add New Site**.
2. Enter values for site name, street address, city, state and country. Then click **Create Site**.
3. Verify your work as follows:
  - a. From the Application Administrator menu, select **Sites**.
  - b. Select the site name and ensure the information you added is correct.

#### **4.1.4. Deactivate a Site**

TBD

#### **4.1.5. View List of All Users Using No Site**

The Application Administrator can see a list of all CUI users using the No Site feature. To view this list, sign in as an Application Administrator and complete the following steps.

1. From the Application Admin menu in the upper right, select **All CUI Users**. The system displays the following:

**Figure 10. Show all CUI Users Option**

Name	Sites with Access
<a href="#">Carl, Richard</a>	Virginia Medical Center • All Sites
<a href="#">Clinician User 1, Texas Medical Center</a>	Texas Medical Center
<a href="#">Clinician User 1, LA Medical Facility</a>	LA Medical Facility

2. From the drop-down list under “Sites,” select the No site - (show all cui users) option. The system displays a list similar to the following:

**Figure 11. All CUI Users with Assigned Sites**

Name	Sites with Access
<a href="#">Carl, Richard</a>	Texas Medical Center • Austin Medical Center
<a href="#">Clinician User 1, Texas Medical Center</a>	
<a href="#">Clinician User 1, LA Medical Facility</a>	Texas Medical Center • All Sites • Austin Medical Center
<a href="#">Demo, John</a>	
<a href="#">Demo, John</a>	
<a href="#">Carl, Richard</a>	Virginia Medical Center • All Sites

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#### 4.1.6. Use All Sites Feature

The All Sites function allows an Application Administrator to update a user's role(s) for all sites in CUI at the same time rather than having to update a user's role(s) in each site individually.

**Note:** Only an Application Administrator has the ability to give All Sites permissions to a user.

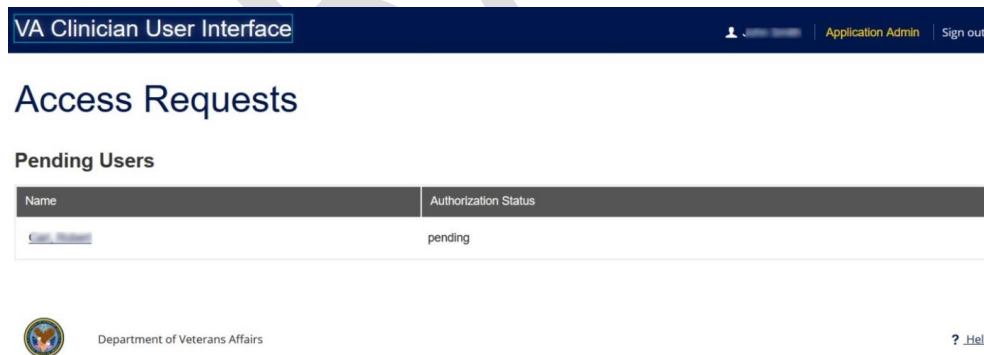
1. From the Application Administrator menu, select **Profiles & Roles**. The system displays a list of all CUI users.
2. From the User's drop-down list, select the name of the user you want to give All Sites permission to.
3. Under "Choose a Site to add roles for *User Name*," click **Select a Site** and select **All Sites**.
4. Under "*User Name*'s current roles @ All Sites," select the role(s) you want to give the user permissions for and click **Update Roles**.
5. Verify your work as follows:
  - a. From the Application Administrator menu, select **Sites**.
  - b. In the list of Current CUI Sites, select the No site name and ensure the information you added is correct.

**Comment [PDS1]:** What is the intent of the All Sites feature? It doesn't seem to give a user the same roles for all sites. That's what's documented in this section, but it may not be correct. When I give someone All Sites and certain roles, the roles don't appear on each individual site.

#### 4.1.7. View User Access Requests

The Access Requests function allows an Application Administrator to view a list of current requests for access to CUI from new users. To view the list, go to the Application Administrator menu and select **Access Requests**. The system displays the following page:

Figure 12. Access Requests



#### 4.1.8. Define a Veteran Service Organization (VSO)

TBD

#### 4.1.9. Add a Contract Exam Provider

TBD

### 4.2. Site Administrator Procedures

As a Site Administrator, you have privileges for your site(s) only. You will receive email requests from the system for various permissions for users at your site. Over time, it may be necessary for you, the Site Administrator, to add a user for your site and then delete the user's permissions to your site when authorization is no longer needed.

#### 4.2.1. Update Your Site Profile

You must have Site Administrator privileges for a site before you can update it. To update a site, sign in as Site Administrator and complete the following steps:

1. From *your name* link in the upper right of the page, select **My Sites**.
2. Under "Which site would you like to work with," click the name of the site you want to update and then click **Select**.
3. From the Site Administrator menu, select **Site Profile**. [Functionality TBD; this write-up will be completed later]

## 4.2.2. Grant Site Access and User Roles to an Existing User

When a CUI user wants access to a specific site, they must sign in to CUI and complete the steps in the First-Time Sign In” section. The system will generate an email to you requesting access. Open the email and complete the following steps:

1. Visit the link in the email. As a result, the system displays a CUI sign-in page.
2. Enter your Site Administrator login and password. The system displays a page similar to the following:

Figure 13. New Site Access Request Page

VA Clinician User Interface - Virginia Medical Center

New Site Access Request

The following individual has requested Site Access:

Field	Value
Name:	Alanna Triage
E-mail Address:	alanna@gmail.com

Roles Requested: < Triage >

Grant site roles for Alanna Triage below:

Field
<input type="checkbox"/> Administrator
<input type="checkbox"/> Triage
<input type="checkbox"/> Scheduling
<input type="checkbox"/> Clinician
<input type="checkbox"/> Supervisory Clinician
<input type="checkbox"/> Quality Assurance

Grant Roles

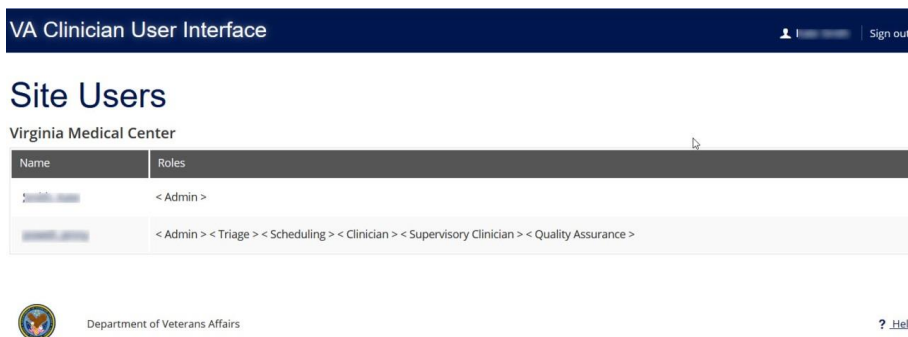
Department of Veterans Affairs

? Help

3. Select the check box(es) for the roles you want the user to have and click **Grant Roles**.

4. Verify your work as follows:
  - a. Select **All CUI Users**.
  - b. Select the site assigned to the user.
  - c. Ensure that the user name appears for the select site with the correct user role(s). An example follows:

**Figure 14. Site Users Page**



#### 4.2.3. Add or Delete User Role(s) for a Site

With the exception of an Application Administrator, the Site Administrator for a specific site (or location) is the only person who has the ability to add or delete user roles for users of that site. For example, the Los Angeles Medical Center Site Administrator is the only person who can change roles for a user with access to the Los Angeles Medical Center site.

**Note:** A Site Administrator can remove all roles for a particular user of their site; however, this does not affect the user's roles on other sites or in CUI as a whole. **Only** an Application Administrator can remove a particular user from CUI completely.

When a user requests a role change for your site via CUI, the system will generate an email to you for this request. Open the email and complete the following steps:

1. Visit the link in the email. The system displays a CUI sign-in page.
2. Enter your CUI Site Administrator login and password. The system displays the New Site Access Request page. Ensure that the correct site for the user appears in the top menu bar.
3. Click the check box(es) for the appropriate site user role(s) and then click **Grant Roles**.
5. Verify your work as follows:
  - a. Select **All CUI Users**.
  - b. Select the site you assigned to user.
  - c. Ensure that the user name appears for the selected site with the correct user role(s).

A Site Administrator can also update roles without a user-generated email by selecting **User Profiles** from the Site Administrator menu.

**Comment [PDS2]:** Are we going to add the ability to remove a user from CUI entirely? For example, if someone quits or retires, they should probably be removed.

**Comment [PDS3]:** Will this be true?

## 5. Process a Veteran Exam

Processing a Veteran exam in CUI involves Triage, Scheduler, Clinician, Supervisory Clinician and Quality Assurance users. Steps in the typical process and which user role is responsible are shown in the following table. Steps may be modified or added to accommodate changes in exam date, location, evaluations, and so forth. Detailed information on how to accomplish each step is provided in the remainder of this section.

**Table 3. CUI Veteran Exam Process**

Step	User Role
1. Create an exam. 2. Assign a clinician. 3. Move to scheduling.	Triage
4. Schedule the exam request.	Scheduler
5. Add contention and evaluation(s). 6. Conduct a full body evaluation for applicable exams. 7. Submit exam and evaluations for review if needed.	Clinician
8. Review exam and evaluations, reject or approve.	Supervisory Clinician
9. If required, review exam and evaluations for quality assurance.	Quality Assurance

### 5.1. Detailed Process

#### 5.1.1. Triage Steps

1. Sign in to CUI using your Triage credentials.
2. In the Triage – Examination Requests list, find the name of the Veteran you want to add an examination request for and click **Take action**.
3. On the Exam Request Details page, under the list of Associated Examinations, click **Create Exams**. The system displays the Create Exams page.
4. Enter a brief description about the reason for the exam in the Purpose field and then click **Create**.
5. From Triage – Pending Examinations list, find the name of the Veteran and click **Take action**. The system displays, “Examination is not yet assigned to a clinician.”
6. Click **Assign clinician**.
7. In the Clinician field, select the name of the clinician you want to assign and then click **Submit**. The system displays, “Are you sure you want to assign the clinician?”



8. Click **OK**. The system displays, “Examination has been successfully updated.”
9. Click **Ready to be scheduled**. The system displays, “Are you sure you want to confirm?”
10. Click **OK**. The system displays, “Examination state has been changed to ‘Ready To Be Scheduled’.”

### 5.1.2.Scheduler Steps

1. Sign in to CUI using your Scheduler credentials.
2. In the Ready to be Scheduled Examinations list, find the name of the Veteran whose examination you want to schedule and click **Take action**.
3. Add a date to the date field using the pop-up calendar and click **Schedule Examination**.

### 5.1.3.Clinician Steps

1. Sign in to CUI using your Clinician credentials.
2. In the Clinician - Scheduled Examinations list, find the name of the Veteran whose examination you want to process and click **Take action**.
3. Add a contention and evaluation(s). Details TBD.
4. Conduct a full body evaluation for applicable exams. For complete instructions, see Section 8, “Clinician Procedures.”
5. Submit exam and evaluations for review if needed by clicking **Ready for Review**. The system displays, “Examination is now ready for review by supervising clinician.”

### 5.1.4.Supervising Clinician Steps

1. Sign in to CUI using your Supervisory Clinician credentials.
2. In the Supervisory Clinician – Ready for Review Examinations list, find the name of the Veteran whose examination you want to review and click **Take action**.
3. Review examination and evaluation data in the Veteran’s file. If information is complete and accurate, click **Reviewed**. Otherwise, click **Rejected** so that various checks and revisions can be made and a review can once again be placed in the work queue.

### 5.1.5.Quality Assurance Steps

1. Sign in to CUI using your Quality Assurance credentials.
2. TBD.

## 6. Triage Procedures

This section covers all CUI procedures that Triage users are responsible for:

- View the Triage work queue
- Create an examination request
- Make assignment changes to an examination or evaluation that has been put in the site work queue

### 6.1. View Your Triage Work Queue

To view your Triage work queue, you must have a site assigned and be signed in to CUI. A sample work queue is shown in below.

Figure 15. Sample Triage Work Queue

VA Clinician User Interface

CUI Dashboard

Triage - Examination Requests:

Veteran Name	File Number	Site	
[Redacted]	[Redacted]	Texas Medical Center	<a href="#">Take action</a>
[Redacted]	[Redacted]	Texas Medical Center	<a href="#">Take action</a>
[Redacted]	[Redacted]	Texas Medical Center	<a href="#">Take action</a>
[Redacted]	[Redacted]	Texas Medical Center	<a href="#">Take action</a>

Triage - Pending Examinations:

Veteran Name	Contention	State	Associated Site	Clinician	
[Redacted]	Very severe joint pain	Pending	Texas Medical Center		<a href="#">Take action</a>
[Redacted]	Very severe joint pain	Pending	Texas Medical Center		<a href="#">Take action</a>
[Redacted]	Very severe joint pain	Pending	Texas Medical Center	Texas Medical Center Clinician User 1	<a href="#">Take action</a>

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[Help](#)

## 6.2. Create a Manual Examination Request

As a Triage user, when examination requests are generated in VBMS (Veterans Benefits Management System) and associated with your site, they will automatically appear in the work queue on your CUI dashboard. Optionally, you can manually create an examination request provided the Veteran's record has been added to CUI. Perform the following steps:

1. Sign in to CUI as a Triage user.
2. In the Triage – Examination Requests area of the dashboard, find the name of the Veteran you want to add an examination request for and click **Take action**.
3. On the Exam Request page, under Exam Request, click **Create Exams**. The system displays the Create Scheduled Exam Request page.
4. Enter information required to create a new claim, including first name, last name, Social Security Number, date of birth, and file number; select a site from the Site drop-down menu.
5. Click **Create Exam Request**. The system displays, “Scheduled Exam Request has been successfully created.”
6. Verify your work as follows:
  - a. In the Triage – Pending Examinations area of the dashboard, find the name of the Veteran and select **Take action**.
  - b. Ensure the information you entered is correct.

## 6.3. Assign an Examination Request to Another Site

An exam request can either be generated through VBMS (and you will receive an email notification) or you can manually create an exam request. In both instances, if you find your site cannot accept the exam request, you can assign it to another site for processing. Complete the following steps:

1. Sign in to CUI as a Triage user. The system displays your Triage dashboard.
2. If you have previously created an Examination Request, the Veteran's information will appear in the Triage - Pending Examination area. Otherwise, the Veteran's information will appear in the Triage - Examination Requests area. In either case, find the name of the Veteran whose exam you want to change and click **Take action**. The system displays a page with an option that allows you to assign the Examination Request to a different site.
3. Click **Assign to different site**. The system displays the Assign to a different site page.
4. Choose a site using the “Select a site” drop-down list and click **Submit**. The system displays, “Are you sure you want to modify the exam request?”
5. Click **OK**. The system removes the exam request from your site work queue and adds it to the work queue for the newly assigned site. Also, the Triage user for the newly assigned site can view the History table with this assignment change.

## 6.4. Assign a Clinician to an Examination Request

For a Triage user to assign a clinician to an examination request, the clinician must have access to CUI and the site where the examination will be scheduled. Complete the following steps:

1. On your Triage dashboard under Triage – Pending Examination, find the name of the Veteran whose exam you are processing and click **Take action**. The system displays the Examination Details page.
2. Click **Assign clinician**. The system displays the Assign Clinician page.
3. From the “Select a clinician” drop-down list, select the clinician name and then click **Submit**. The system displays, “Are you sure to want to assign the clinician?”
4. Click **OK**. The system displays, “Examination has been successfully updated and the assignment appears in the Examination History table at the bottom of the page.

## 6.5. Reassign an Examination Request to a Different Clinician

For a Triage user to assign a different clinician to an examination request, the clinician must have access to CUI and the site where the examination will be scheduled. Complete the steps in Section 6.4, “Assign a Clinician to an Examination Request.”

## 6.6. Add, Update or Change a CUI Exam or Evaluation

TBD

## 6.7. Request Re-work from VBA

Re-work requests are a way to ask for clarification or additional information from VBA.

TBD

## 7. Scheduling Procedures

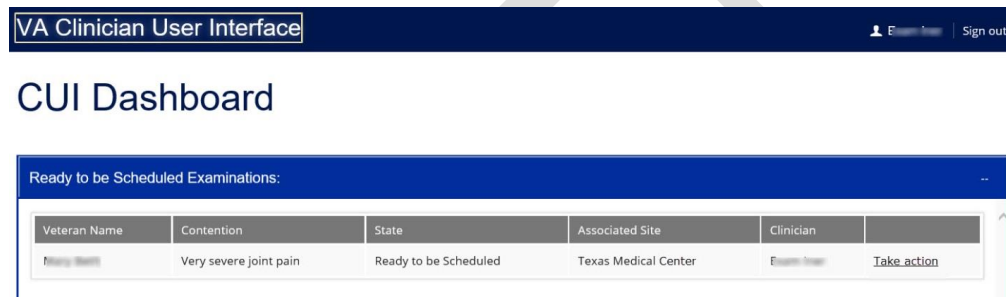
This section covers all CUI procedures that Scheduling users are responsible for:

- View the Scheduling work queue
- Schedule an examination request
- Add related requests
- Update an examination schedule

### 7.1. View Your Scheduling Work Queue

To view your Scheduling work queue, you must have a site assigned and be signed in to CUI. A sample work queue is shown below.

Figure 16. Sample Scheduling Work Queue



The screenshot shows the VA Clinician User Interface. At the top is a dark blue header with the text "VA Clinician User Interface" on the left and a user profile icon with the name "E. Brown" and a "Sign out" link on the right. Below the header is the "CUI Dashboard". The main content area is titled "Ready to be Scheduled Examinations:" and contains a table with the following data:

Veteran Name	Contention	State	Associated Site	Clinician	
Henry, Henry	Very severe joint pain	Ready to be Scheduled	Texas Medical Center	E. Brown	<a href="#">Take action</a>

### 7.2. Schedule an Examination Request

Complete the following steps:

1. Sign in to CUI using your Scheduler credentials. The system displays the Scheduler dashboard.
2. In the Ready to be Scheduled Examinations list, find the name of the Veteran whose examination you want to schedule and click **Take action**.
3. Add a date to the date field using the pop-up calendar and click **Schedule Examination**. The system updates the History table for the examination request to reflect this action.

### 7.3. Add Related Requests

TBD

### 7.4. Update an Examination Schedule

TBD

## 8. Clinician Procedures

### 8.1. Performing an Exam and Evaluation with CUI

The Clinician User Interface (CUI) allows clinicians to approach the exam process from an integrated view and move more fluidly between the major elements of an exam:

- Pre-Exam
- Interview
- Physical
- Plan

For example, the clinician may complete the exam process in this order: interview the patient, conduct a physical examination, give the patient a recovery plan, and fill out the disability benefits questions after the patient leaves. With CUI, the clinician can alternatively choose to move between the interview, physical examination and filling out questions during the time spent with the patient.

What's critical is that all exam elements and data are captured in CUI and the results are sent to the next stage in the disability benefits assessment process. The processes in this section assume that a clinician is signed in to CUI.

### 8.2. Complete Pre-Exam

TBD

1. Select the patient name from the list of open exams.
- 2.

### 8.3. Complete Interview

TBD

1. Select the patient name from the list of open exams.
- 2.

### 8.4. Record Data from an Exam and Evaluation in CUI

A clinician must capture and record answers to disability benefits questionnaires in CUI using data discovered during the interview and physical portions of the exam and evaluation. An example of recording answers to the Traumatic Brain Injury (TBI) evaluation is shown in the steps below.

1. From your list of patients, select the appropriate patient name. The system displays a New examination page as follows:

Figure 17. New Examination Page

2. Click the **Physical** button. As a result the system displays the list of full body evaluations grouped by category.
3. Select **Show the Neurological Examination Information > An Examination of Residuals of Traumatic Brain Injury (TBI) is being performed > Show the TBI Examination Information**.

Figure 18. Example: Selecting a TBI Examination

4. Under “Choose the Qualifier for this TBI Examination, select the appropriate option.
5. In each section of the evaluation—such as Diagnosis; Assessment of facets of TBI-related impairment; and Additional residuals, other findings, diagnostic testing, functional impact and remarks—select or enter responses to questions as shown.

Figure 19. Example: TBI Examination Questionnaire

#### Notes:

- The system provides show/hide functionality at all levels from the full body evaluation tree to within each evaluation so you can toggle how much information is displayed.
  - CUI automatically saves your data entry every **five** minutes. Additionally, your data is saved even if you move to different areas or evaluations within the same patient exam.
  - Some evaluations direct you to complete an evaluation for a related body system. Return to the patient's record and select the **Create New Claim** button to add it manually *or* click the **link** to add the evaluation to the patient's record automatically.
  - Certain evaluations contain sections that allow you to upload files such as MRI files or x-ray results. See Section 11, "Upload Attachments" for more information.
6. When you reach the end of the evaluation and have finished answering all questions, click **Save**.
  7. When you are ready to submit a completed evaluation, click **Review**. As a result, the system displays the questions and the answers you entered along with any errors. **Note:** You must resolve all questions flagged with a red asterisk as their answers are required during the rating process that occurs outside of CUI.
  8. After all required questions are answered, click **Submit for Review**. The system **TBD** and returns you to the full-body list of exams.

**Comment [PDS4]:** Need confirmation on whether this is every 1 minute rather than every 5 minutes.

**Comment [PDS5]:** Possible future functionality. Not in place currently.

**Comment [PDS6]:** Need wording here about where entries are sent.

## 8.5. Complete the Plan

To complete the plan element of an exam, log in to CUI and perform the following steps:

1. TBD



## 8.6. Complete the Examination

To complete the examination, log in to CUI and perform the following steps:

1. TBD

DRAFT

## 9. Supervisory Clinician Procedures

This section covers all CUI procedures that Supervisory Clinician users are responsible for:

- Review information included in examination results
- Ensure that information is complete and accurate for the VBMS Ratings Calculator
- Send final examination results to VBMS for rating

### 9.1. View Your Supervisory Clinician Work Queue

To view your Supervisory Clinician work queue, you must have a site assigned and be signed in to CUI. A sample work queue is shown below.

Figure 20. Sample Supervisory Clinician Work Queue

VA Clinician User Interface

Supervisory Clinician - Ready for Review Examinations:

Veteran Name	Contention	State	Associated Site	Clinician
[Redacted]	Very severe joint pain	Completed	Texas Medical Center	Texas Medical Center (Clinician User 1)

Take action

Supervisory Clinician - Reviewed Exams:

Veteran Name	Contention	State	Associated Site	Clinician
[Redacted]	Severe leg pain	Reviewed	Texas Medical Center	[Redacted]
Susanne Smith	Heart issues	Reviewed	Texas Medical Center	[Redacted]
[Redacted]	Very severe joint pain	Reviewed	Texas Medical Center	[Redacted]
[Redacted]	Very severe joint pain	Reviewed	Texas Medical Center	[Redacted]
[Redacted]	Very severe joint pain	Reviewed	Texas Medical Center	[Redacted]
[Redacted]	Very severe joint pain	Reviewed	Texas Medical Center	[Redacted]

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Help

### 9.2. Review Completed CUI Evaluations and Examinations

Complete the following steps:

1. Sign in to CUI using your Supervising Clinician credentials.

2. In the Supervisory Clinician - Ready for Review Examinations list, find the name of the Veteran whose examination you want to review and click **Take action**.
3. Review examination and evaluation data in the Veteran's file. If information is complete and accurate, click **Reviewed**. Otherwise, click **Rejected** so that various checks and revisions can be made and a review can once again be placed in the work queue.

DRAFT

## 10. Quality Assurance Procedures

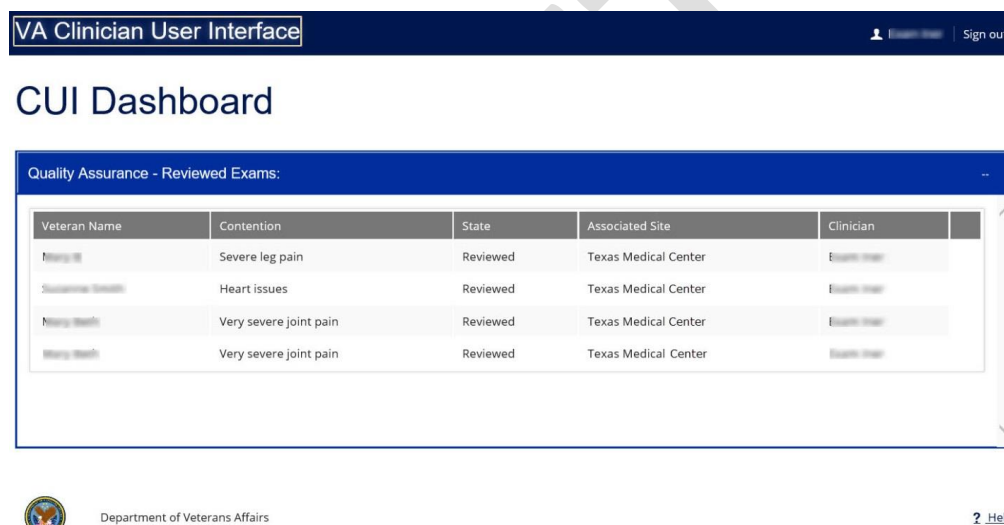
This section covers all CUI procedures that Quality Assurance users are responsible for:

- Review completed evaluations and examination results
- TBD
- TBD

### 10.1. View Your Quality Assurance Work Queue

To view your Quality Assurance work queue, you must have a site assigned and be signed in to CUI. A sample work queue is shown below.

Figure 21. Quality Assurance Work Queue



The screenshot displays the 'VA Clinician User Interface' with a header bar containing a user profile icon and 'Sign out' link. Below the header is the 'CUI Dashboard' section. A prominent blue box titled 'Quality Assurance - Reviewed Exams:' contains a table with the following data:

Veteran Name	Contention	State	Associated Site	Clinician
Mary M	Severe leg pain	Reviewed	Texas Medical Center	<a href="#">Exam Date</a>
Susan M Smith	Heart issues	Reviewed	Texas Medical Center	<a href="#">Exam Date</a>
Mary Smith	Very severe joint pain	Reviewed	Texas Medical Center	<a href="#">Exam Date</a>
Mary Smith	Very severe joint pain	Reviewed	Texas Medical Center	<a href="#">Exam Date</a>

At the bottom of the dashboard, there is a 'Department of Veterans Affairs' logo and a 'Help' link.

### 10.2. Review Completed CUI Evaluations and Examinations

TBD

## 11. Upload Attachments

*This section TBD*

Four roles have the ability to upload attachments to patient records in CUI: Triage, Clinician, Supervisory Clinician and QA. To upload an attachment, complete the following steps.

1. Sign in to CUI.
2. Open a patient exam.
3. TBD.

DRAFT

## 12. Generate a PDF of an Evaluation

Currently, any CUI user that can create or open an evaluation in CUI—such as a Clinician—can generate a PDF of an evaluation using the following steps.

1. Log in to CUI as a Clinician and click the patient's name.
2. Open an existing evaluation from the Contentions page -or- add a new (blank) evaluation and open it.
3. Click the **View blank PDF** button in the upper right of the evaluation page. CUI opens a PDF of the evaluation.

Figure 22. Blank PDF Feature

The screenshot displays the VA Clinician User Interface. At the top, a dark blue header bar contains the text 'VA Clinician User Interface v1.0.20160902a' on the left and a user profile icon with the name 'Dustin' and a 'Sign out' link on the right. Below the header, a light blue sidebar on the left lists 'Evaluations' and a category 'Myocardial Infarction' with several sub-items. The main content area is titled 'Evaluation: Myocardial Infarction (Version: 1.0.0)'. It contains a form with a question: 'Is this Myocardial Infarction evaluation secondary to another? If so, select the primary evaluation.' followed by a text input field labeled 'Select a primary evaluation'. Below this is a note: 'NOTE: If there is involvement of more than one extremity, please complete one evaluation per affected extremity.' and another question: 'Has the Veteran had a myocardial infarction?' with radio button options for 'Yes' and 'No'. At the bottom of the form, there are two buttons: 'Review' and 'Save as draft'. A red circle highlights the 'View blank PDF' button located in the top right corner of the evaluation form area. The footer of the page includes the Department of Veterans Affairs logo and name on the left, and a 'Help' link on the right.

4. From the PDF, click the printer icon to print the PDF or click **Page > Save as** to save the PDF; see Figure 23.

Figure 23. Sample Evaluation PDF

The screenshot shows a web browser window with a Google search bar at the top. The address bar contains a URL that is partially obscured by a red circle. The main content area displays the following information:

Claim: James P. Miller 2016-08-25

Associated Contentions:

Septic 10 days

Evaluation: Myocardial Infarction (Version: 1.0.0)

Has the Veteran had a myocardial infarction?

☐ Yes

☐ No

Briefly describe the history (including onset and course) of the diagnosis:

Below this text is a large, empty rectangular box for text entry.

The PDF generated by CUI is captured as of when the user clicks **View blank PDF**. Thus, if someone has entered partial or incomplete data in the evaluation, the PDF will contain all questions and answers with the selected answers indicated. If no questions have been answered, the PDF will contain all questions and answers without any selected answers.

## 13. Troubleshooting

Consult the following table for assistance with CUI issues.

**Table 4. Trouble Shooting Issues and Actions**

Issue	Suggested Actions
What do I need to log in to CUI?	You need a laptop running Windows 7 or higher; and one of the following: <ul style="list-style-type: none"><li>• VA network login and password</li><li>• PIV card</li><li>• VA-issued computer</li></ul>
I have Clinician and Supervisor Clinician roles on LA Medical Center. I also have the Triage role on All Sites. How do I make the Triage role show up under LA Medical Center?	[Ask Isaac if feature is working as planned]
I'm logged in to CUI, but I don't have a site assigned. How can I get a site assigned to me?	

### 13.1. Special Instructions for Error Correction

*Describe all recovery and error correction procedures, including error conditions that may be generated and corrective actions that may need to be taken.*



## Appendix A. Frequently Asked Questions

### A.1. “Assign to another facility” Button

**Q. How is the receiving facility notified?**

A. All Triage users for the receiving site (facility) receive an email message that there is a new examination request for their attention, and it will show up in the pending work queue of those Triage users.

**Q. Does the receiving facility have a choice to accept or decline the transfer of the exam request? How is the sending facility notified?**

A. Currently, the transfer is immediate and the receiving site has the option to process it, send it to another site, or decline it (just as the initial site could). If it is declined, that action notifies VBMS and removes it from processing within CUI.

**Q. Does the “2507 exam request” also transfer so the receiving facility gets the instructions needed to complete the evaluation?**

A. Yes, *all* information pertinent to a pending examination request will be transferred as a package.

**Q. Once the receiving facility completes the examination, how is the exam report returned to the sending facility so the exam request can be closed once all examinations pertaining to the exam request are completed? How is workload captured at each facility?**

A. Each site is responsible for managing the examinations scheduled to be performed at that site (mostly through automatic CUI tracking and status reporting). When *all* examinations scheduled in support of a contention have been completed, CUI will report that the contention has been satisfied from an examination point of view, and CUI will send a completeness status through DAS to VBMS, along with the particulars of all examinations. As of now, no discussion has taken place about having human verification within that process.

### A.2. “Assign to clinician” Button

**Q. Does each contention have to be assigned individually?**

A. As of now yes, each contention has to be individually assigned to a Clinician.

**Q. Can multiple contentions to be assigned to one clinician be selected as a group and the process done only once?**

A. To be determined.