

# Modern Claims Processing

Human-Centered Design  
Workshop Journal



ATLAS  
RESEARCH

+

VA



U.S. Department  
of Veterans Affairs

This journal belongs to:



# How might we modernize the VA’s disability claims process by designing solutions to empower Adjudicators to deliver efficient, effective, and easy disability ratings that build trust and improve the Veteran Experience?

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*"Human-Centered Design helps us to understand what our customers really need so that we can create solutions that are relevant and important to them. It gives us the tools to put [users] at the start and the center of our work. This means that we prioritize our efforts how [users] would want them prioritized, and helps us make sure that when we invest in something, we're investing in the right projects, ideas, or technologies for [users]."*

— DEPARTMENT OF VETERANS AFFAIRS CENTER FOR INNOVATION,  
"DESIGNING FOR VETERANS"

# VA ADJUDICATOR JOURNEY



**KEY**

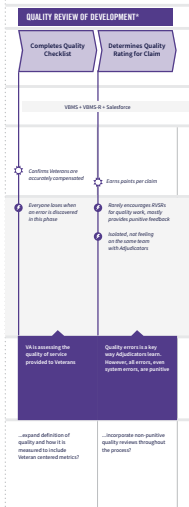
- 📍 Pain Spot
- 👤 Action
- 🛠️ Tool or System

The VA Adjudicator Journey Map represents a common set of moments Adjudicators experience during the life-cycle of a claim. While this map does not represent what every Adjudicator does, thinks and feels as they process each claim, it is a good starting point to highlight the bright spots and pain points during the process and recognize high impact improvement opportunities. This journey map identifies key moments that matter during which the VA can build trust and positively impact Adjudicators' work experience and, in turn, the VA's customer experience. The corresponding opportunity statements are intended to help kickstart idea generation for addressing the needs of these key moments.

PHASE	GETTING THE CLAIM READY FOR RATING				PLANNING THE WORK WEEK				QUALITY REVIEW OF DEVELOPMENT		ORGANIZING ISSUE LIST		AGGREGATING EVIDENCE WHILE BUILDING CONTEXT					
ACTIONS	Introduce BDD Program to SSMs	Reviews Submitted Claims to List Next Actions	Retrieves Medical Files From Private Doctors, DOD & VHA Systems	Establishes Claim & Requests Exams	Releases Claim to the National Work Queue	Gets Ready	Reviews Weekly Bulletin for Protocol & Policy Changes	Scans Issue Lists for Complicated Issues	Plans Approach to Reach Daily Point Goals	Selects Claim	Reviews HSC's or VSR's Work Through SL Check	Checks for additional Medical Files in VHA Systems	Creates Truncated Claimed Issue List	Consolidates Claimed Issues Based Similarity	Chronologizes Medical Evidence Files	Seeks Evidence for Each Issue	Aggregates Issue Evidence	Invests for CA
TOOLS & SYSTEMS	Webline	Webline	Webline	Webline	Webline	Webline	Webline	Webline	Webline	Webline	Webline	Webline	Webline	Webline	Webline	Webline	Webline	Webline
BRIGHT SPOTS	1-person meeting with Servicemembers	Helping SSM understand how the Disability Claim process works	1-person meeting with Servicemembers	Helping SSM understand how the Disability Claim process works	1-person meeting with Servicemembers	Helping SSM understand how the Disability Claim process works	1-person meeting with Servicemembers	Helping SSM understand how the Disability Claim process works	1-person meeting with Servicemembers	Helping SSM understand how the Disability Claim process works	1-person meeting with Servicemembers	Helping SSM understand how the Disability Claim process works	1-person meeting with Servicemembers	Helping SSM understand how the Disability Claim process works	1-person meeting with Servicemembers	Helping SSM understand how the Disability Claim process works	1-person meeting with Servicemembers	Helping SSM understand how the Disability Claim process works
PAIN POINTS	No ability to track the claim process and the consequences of their work	Unable to correct any mistakes & learn from them due to HSC workflow	Can't rely on by weekly. Factors are not clearly accepted by the Contract Medical Examiner	Can't rely on by weekly. Factors are not clearly accepted by the Contract Medical Examiner	Can't rely on by weekly. Factors are not clearly accepted by the Contract Medical Examiner	Can't rely on by weekly. Factors are not clearly accepted by the Contract Medical Examiner	Can't rely on by weekly. Factors are not clearly accepted by the Contract Medical Examiner	Can't rely on by weekly. Factors are not clearly accepted by the Contract Medical Examiner	Can't rely on by weekly. Factors are not clearly accepted by the Contract Medical Examiner	Can't rely on by weekly. Factors are not clearly accepted by the Contract Medical Examiner	Can't rely on by weekly. Factors are not clearly accepted by the Contract Medical Examiner	Can't rely on by weekly. Factors are not clearly accepted by the Contract Medical Examiner	Can't rely on by weekly. Factors are not clearly accepted by the Contract Medical Examiner	Can't rely on by weekly. Factors are not clearly accepted by the Contract Medical Examiner	Can't rely on by weekly. Factors are not clearly accepted by the Contract Medical Examiner	Can't rely on by weekly. Factors are not clearly accepted by the Contract Medical Examiner	Can't rely on by weekly. Factors are not clearly accepted by the Contract Medical Examiner	Can't rely on by weekly. Factors are not clearly accepted by the Contract Medical Examiner
THIS MOMENT MATTERS BECAUSE...	This is making a first impression on a veteran for VA	This is making a first impression on a veteran for VA	This is making a first impression on a veteran for VA	This is making a first impression on a veteran for VA	This is making a first impression on a veteran for VA	This is making a first impression on a veteran for VA	This is making a first impression on a veteran for VA	This is making a first impression on a veteran for VA	This is making a first impression on a veteran for VA	This is making a first impression on a veteran for VA	This is making a first impression on a veteran for VA	This is making a first impression on a veteran for VA	This is making a first impression on a veteran for VA	This is making a first impression on a veteran for VA	This is making a first impression on a veteran for VA	This is making a first impression on a veteran for VA	This is making a first impression on a veteran for VA	This is making a first impression on a veteran for VA
HOW MIGHT WE...	...empower SSMs to provide best in class customer experience to SSMs?	...empower SSMs to provide best in class customer experience to SSMs?	...empower SSMs to provide best in class customer experience to SSMs?	...empower SSMs to provide best in class customer experience to SSMs?	...empower SSMs to provide best in class customer experience to SSMs?	...empower SSMs to provide best in class customer experience to SSMs?	...empower SSMs to provide best in class customer experience to SSMs?	...empower SSMs to provide best in class customer experience to SSMs?	...empower SSMs to provide best in class customer experience to SSMs?	...empower SSMs to provide best in class customer experience to SSMs?	...empower SSMs to provide best in class customer experience to SSMs?	...empower SSMs to provide best in class customer experience to SSMs?	...empower SSMs to provide best in class customer experience to SSMs?	...empower SSMs to provide best in class customer experience to SSMs?	...empower SSMs to provide best in class customer experience to SSMs?	...empower SSMs to provide best in class customer experience to SSMs?	...empower SSMs to provide best in class customer experience to SSMs?	...empower SSMs to provide best in class customer experience to SSMs?

Signs Evidence Non-Ratable Visual Issues	DETERMINING THE RATING LEVEL FOR EACH ISSUE				WRITING THE STORY & FINALIZING THE CLAIM				AUTHORIZING CLAIM				
Repeats Last 4 Steps for Every File & Every Issue	Determines Service Connection	Confirms Claimed Issues Are Active	Determines Highest, Justifiable Level of Impact	Transfer Work to VBMS-R	Writes the Narrative to Justify the Decision	Populates Narrative Box with Evidence & Guiding Law	Reviews Veteran's Claim Letter For Completeness	Records Points Earned	Verifies Service	Checks Code Sheet for Correct Codes & Disability Percentages	Proofreads Narrative	Generates Award	Publishes "Finalist" Button
Word Doc + VMSD + H2D 1	Word Doc + VMSD + H2D 1	Word Doc + VMSD + H2D 1	Word Doc + VMSD + H2D 1	Word Doc + VMSD + H2D 1	Word Doc + VMSD + H2D 1	Word Doc + VMSD + H2D 1	Word Doc + VMSD + H2D 1	Word Doc / Excel	Word Doc / Excel	Word Doc / Excel	Word Doc / Excel	Word Doc / Excel	Word Doc / Excel
<ul style="list-style-type: none"> <li>⚠️ Signs evidence non-ratable visual issues</li> <li>⚠️ Repeats last 4 steps for every file &amp; every issue</li> </ul>	<ul style="list-style-type: none"> <li>⚠️ 200 claims are easier because the criteria is Active Duty</li> <li>⚠️ Color to determine because it sits on the red color medical evidence</li> </ul>	<ul style="list-style-type: none"> <li>⚠️ Adding links through the Claim Chatting Data &amp; Judgment</li> </ul>	<ul style="list-style-type: none"> <li>⚠️ Challenging, especially for new files, because it requires a suggested rating. The final rating depends on the file</li> <li>⚠️ Not all connections between root &amp; the H2D show where's the evidence with the disability levels</li> <li>⚠️ Pastoral reviews include VDCs summary of the veteran rating decision</li> </ul>	<ul style="list-style-type: none"> <li>⚠️ Calculators seem to give the final answer but only provide a suggested rating. The final rating depends on the file</li> <li>⚠️ Technical (not a parting)</li> <li>⚠️ Frustrating when being unsure about the impact of a decision</li> <li>⚠️ How VDCs help ensure in selecting, proof filling at the correct submission</li> </ul>	<ul style="list-style-type: none"> <li>⚠️ VDCs work along the way helping out</li> </ul>	<ul style="list-style-type: none"> <li>⚠️ VDCs of journals or stuff that has to write a review for narrative</li> <li>⚠️ The required report template is harder for Veterans to understand the decision</li> <li>⚠️ Does the app make sense? (if) it's not applying?</li> </ul>	<ul style="list-style-type: none"> <li>⚠️ Feeling accomplished</li> </ul>	<ul style="list-style-type: none"> <li>⚠️ Predictions points are per hour total after completing claim. VDCs document the most number of issues raised</li> <li>⚠️ Wanting to be strategic &amp; solving the frustration</li> </ul>	<ul style="list-style-type: none"> <li>⚠️ Only about 60 minutes to review per claim</li> <li>⚠️ Not needed to catch errors</li> <li>⚠️ Spending time to check the same data for the full time</li> </ul>	<ul style="list-style-type: none"> <li>⚠️ Supported to get necessary compensation VDC. The one needs the veteran to appeal in order to get it right</li> </ul>	<ul style="list-style-type: none"> <li>⚠️ Wanting to use disability compensation to determine</li> <li>⚠️ Earn points per claim</li> </ul>	<ul style="list-style-type: none"> <li>⚠️ Publishing "Finalist" button</li> </ul>	
<ul style="list-style-type: none"> <li>⚠️ VDCs are handwritten and capturing needs claimed for every points and award</li> <li>⚠️ This is a daunting task that requires continuous focus, organization and mental energy</li> <li>⚠️ VDCs are handwritten and capturing needs claimed for every points and award</li> <li>⚠️ This is a daunting task that requires continuous focus, organization and mental energy</li> </ul>	<ul style="list-style-type: none"> <li>⚠️ Challenging with other Veterans due to heavy medical records from their time in service</li> <li>⚠️ Not all connections between root &amp; the H2D show where's the evidence with the disability levels</li> <li>⚠️ Pastoral reviews include VDCs summary of the veteran rating decision</li> </ul>	<ul style="list-style-type: none"> <li>⚠️ This is where errors are made that lead to incorrect rating decisions</li> <li>⚠️ This is a subtle way to check information as they look their reference for the rating decision</li> <li>⚠️ Serving Veterans is what motivates VDCs and this personal connection between VDCs and Veterans when sharing the claim decision?</li> </ul>	<ul style="list-style-type: none"> <li>⚠️ This is a subtle way to check information as they look their reference for the rating decision</li> <li>⚠️ Serving Veterans is what motivates VDCs and this personal connection between VDCs and Veterans when sharing the claim decision?</li> </ul>	<ul style="list-style-type: none"> <li>⚠️ VDCs work along the way helping out</li> </ul>	<ul style="list-style-type: none"> <li>⚠️ VDCs of journals or stuff that has to write a review for narrative</li> <li>⚠️ The required report template is harder for Veterans to understand the decision</li> <li>⚠️ Does the app make sense? (if) it's not applying?</li> </ul>	<ul style="list-style-type: none"> <li>⚠️ Predictions points are per hour total after completing claim. VDCs document the most number of issues raised</li> <li>⚠️ Wanting to be strategic &amp; solving the frustration</li> </ul>	<ul style="list-style-type: none"> <li>⚠️ Only about 60 minutes to review per claim</li> <li>⚠️ Not needed to catch errors</li> <li>⚠️ Spending time to check the same data for the full time</li> </ul>	<ul style="list-style-type: none"> <li>⚠️ Supported to get necessary compensation VDC. The one needs the veteran to appeal in order to get it right</li> </ul>	<ul style="list-style-type: none"> <li>⚠️ Wanting to use disability compensation to determine</li> <li>⚠️ Earn points per claim</li> </ul>	<ul style="list-style-type: none"> <li>⚠️ Publishing "Finalist" button</li> </ul>			
<ul style="list-style-type: none"> <li>⚠️ The method of getting information takes away from understanding and evaluating the information</li> <li>⚠️ Unlike a fun to build the service and medical history for each issue?</li> </ul>	<ul style="list-style-type: none"> <li>⚠️ Support VDCs analysis and weighting of evidence with the law (VMSD)?</li> <li>⚠️ Help VDCs in reviewing which to calculate selection and data entry?</li> <li>⚠️ Minimize the need for the word doc and design a platform that supports the rating decision?</li> </ul>	<ul style="list-style-type: none"> <li>⚠️ Minimize the need for the word doc and design a platform that supports the rating decision?</li> <li>⚠️ Minimize the need for the word doc and design a platform that supports the rating decision?</li> </ul>	<ul style="list-style-type: none"> <li>⚠️ Minimize the need for the word doc and design a platform that supports the rating decision?</li> <li>⚠️ Minimize the need for the word doc and design a platform that supports the rating decision?</li> </ul>	<ul style="list-style-type: none"> <li>⚠️ VDCs work along the way helping out</li> </ul>	<ul style="list-style-type: none"> <li>⚠️ VDCs of journals or stuff that has to write a review for narrative</li> <li>⚠️ The required report template is harder for Veterans to understand the decision</li> <li>⚠️ Does the app make sense? (if) it's not applying?</li> </ul>	<ul style="list-style-type: none"> <li>⚠️ Predictions points are per hour total after completing claim. VDCs document the most number of issues raised</li> <li>⚠️ Wanting to be strategic &amp; solving the frustration</li> </ul>	<ul style="list-style-type: none"> <li>⚠️ Only about 60 minutes to review per claim</li> <li>⚠️ Not needed to catch errors</li> <li>⚠️ Spending time to check the same data for the full time</li> </ul>	<ul style="list-style-type: none"> <li>⚠️ Supported to get necessary compensation VDC. The one needs the veteran to appeal in order to get it right</li> </ul>	<ul style="list-style-type: none"> <li>⚠️ Wanting to use disability compensation to determine</li> <li>⚠️ Earn points per claim</li> </ul>	<ul style="list-style-type: none"> <li>⚠️ Publishing "Finalist" button</li> </ul>			

**CLAIM COMPLETE**  
 Claims are for printing & mailing to Veterans



\* Claims randomly selected for Quality Review each month for each VDC

# Adjudicator Journey Phases

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# 1

## Getting the Claim Ready for Rating

*“There are few other positions within VA that don't end up in a complete abstraction of real people's needs. As a MSC, I still have that connection to real people.”*

—MILITARY SERVICE COORDINATOR

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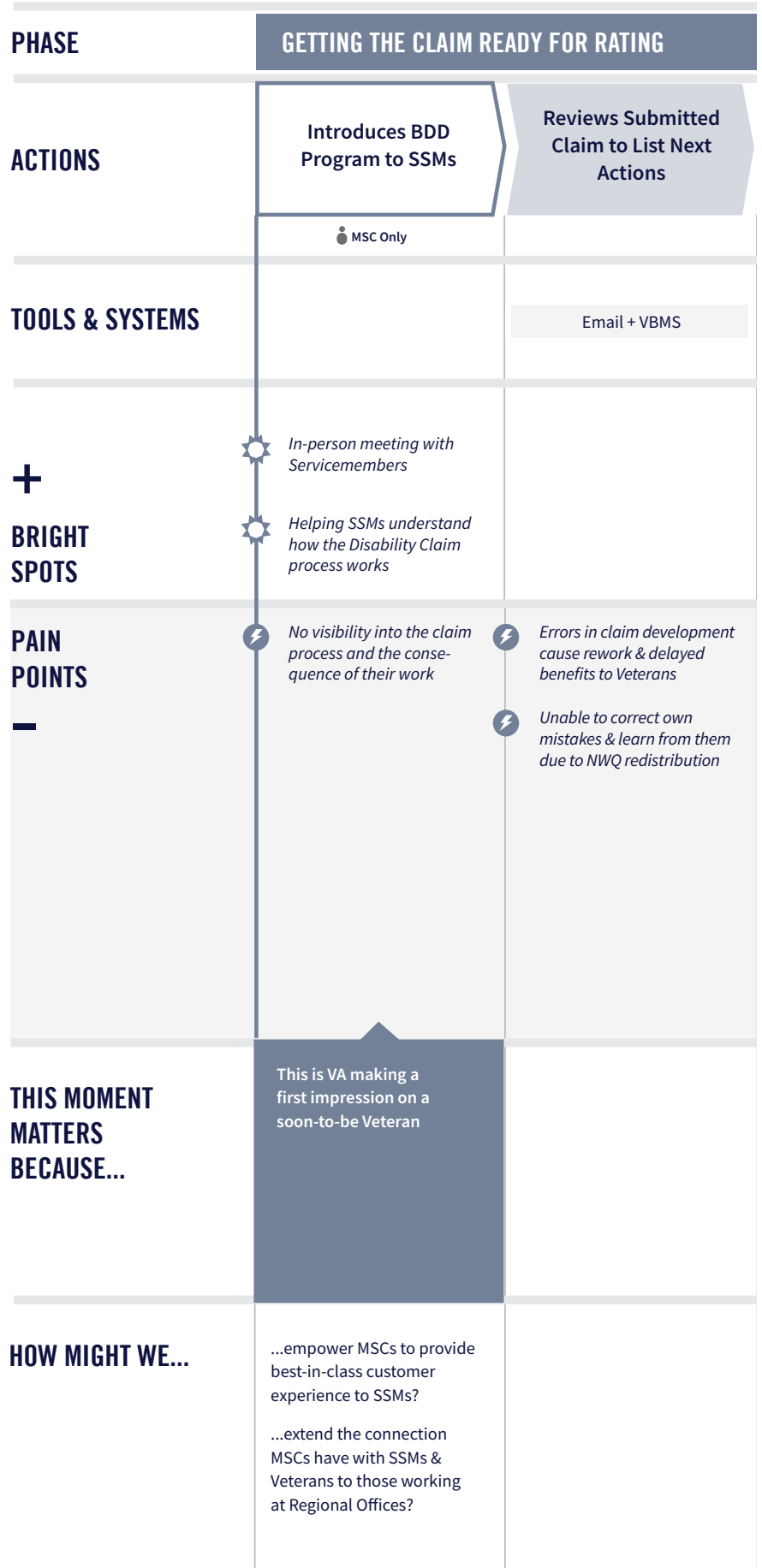
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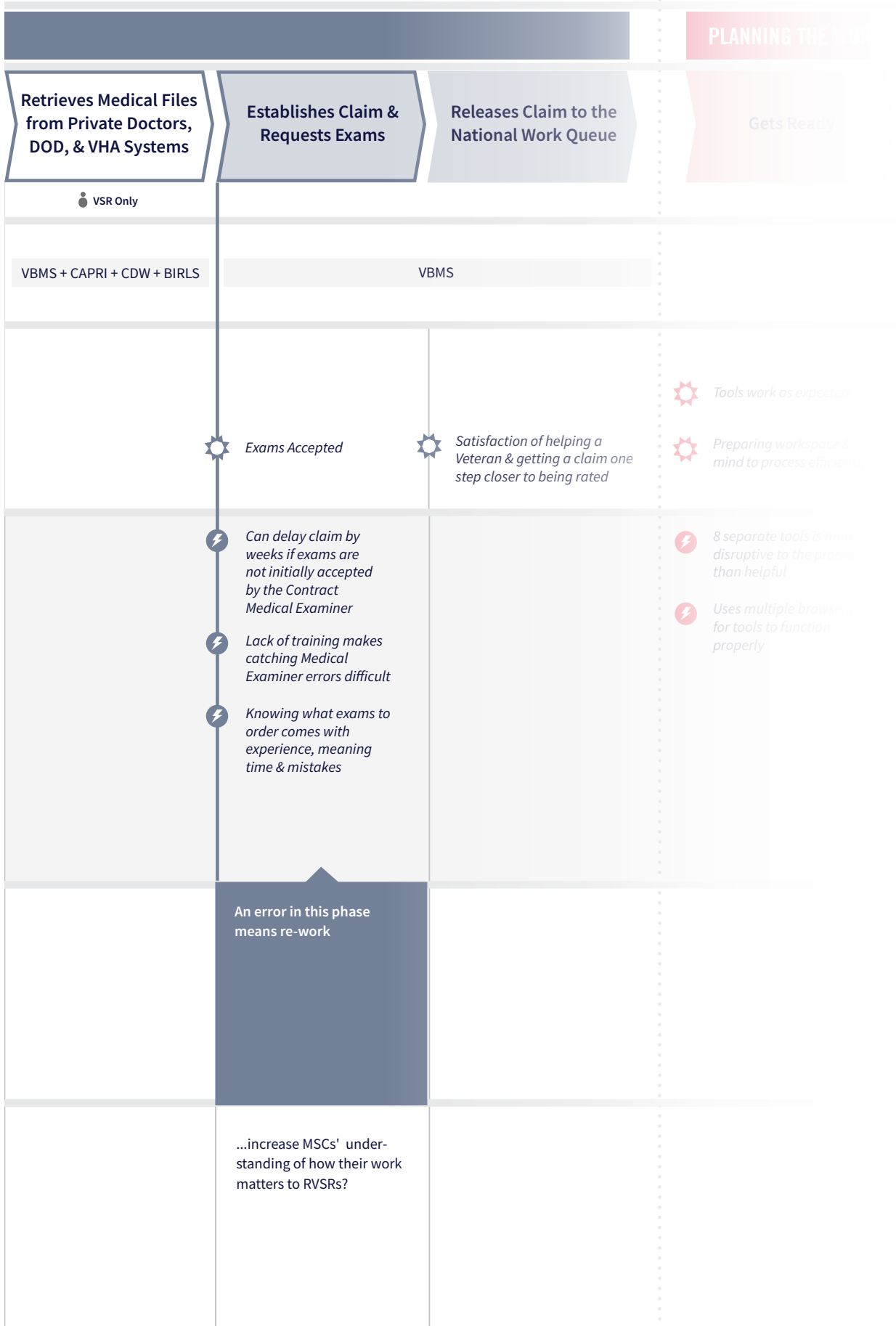
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## INSIGHT

# Serving Veterans gives MSC's work purpose

*"A good day is when a servicemember comes in and they might be negative at first, but when they leave, they know that they can rely on you, and they thank you."*

— MSC

*"I am here for the Vet and I love my job."*

— DECISION REVIEW OFFICER (DRO)

*"MSC get to both process claims and got to talk to the service members directly and assist them and encourage them."*

— MSC COACH

*"It's a really fulfilling job because you get the full breadth of everything."*

— MSC

*"You get to interact with the members and, you know, help them understand how the VA process works. A lot of them are confused."*

— MSC



### Team Mindset

MSC broke protocol and called an RVSR who deferred a BDD claim because the Veteran status was Active Duty. Explained BDD to the RVSR and the RVSR corrected his decision.

INSIGHT

## Lack of understanding and connection to how their work matters to RVSRs

Claim development work determines the success or failure of that claim

*“A little time invested in the front that saves time in the end of the process is worth it.”*

— QUALITY LEADERSHIP

*“We can’t learn if we don’t know the mistakes we’ve made.”*

— RVSR

*“Everybody complains about MSC’s mistakes, but we have no visibility into the longevity of a claim & the consequences of our work.”*

— MSC

*“At least once a day will come across claim where service isn’t right. I used to ask a VSR but it’s just easier for me to do it myself now.”*

— RVSR



### NOTES

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MOMENT THAT MATTERS

# This is the VA making a first impression on a soon-to-be Veteran

**How might we** empower MSCs to provide best-in-class customer experience to SSMs?

**How might we** extend the connection MSCs have with SSMs and Veterans to those working at Regional Offices?

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# An error in this phase means re-work

**How might we** increase MSCs' understanding of how their work matters to RVSRs?

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# 2

## Planning the Work Week

*“What’s in my best interest as an employee?  
What can be turned that day?”*

*“It comes down to how many of those issues  
I can actually rate.”*

—RATING VETERAN SERVICE REPRESENTATIVES

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PHASE **PLANNING THE WORK WEEK**

**ACTIONS**

- Gets Ready
- Reviews Weekly Bulletin for Protocol & Policy Changes

**TOOLS & SYSTEMS** E-Mail + TMS + M21-1

**+ BRIGHT SPOTS**

- Tools work as expected
- Preparing workspace & mind to process efficiently

**- PAIN POINTS**

- 8 separate tools is more disruptive to the process than helpful
- Uses multiple browsers for tools to function properly
- The amount & pace of change to protocol & policy deteriorates confidence in their work
- Knowing what changed requires following links left in the Bulletin (often 2+ clicks) or attending the monthly Quality call

**THIS MOMENT MATTERS BECAUSE...**

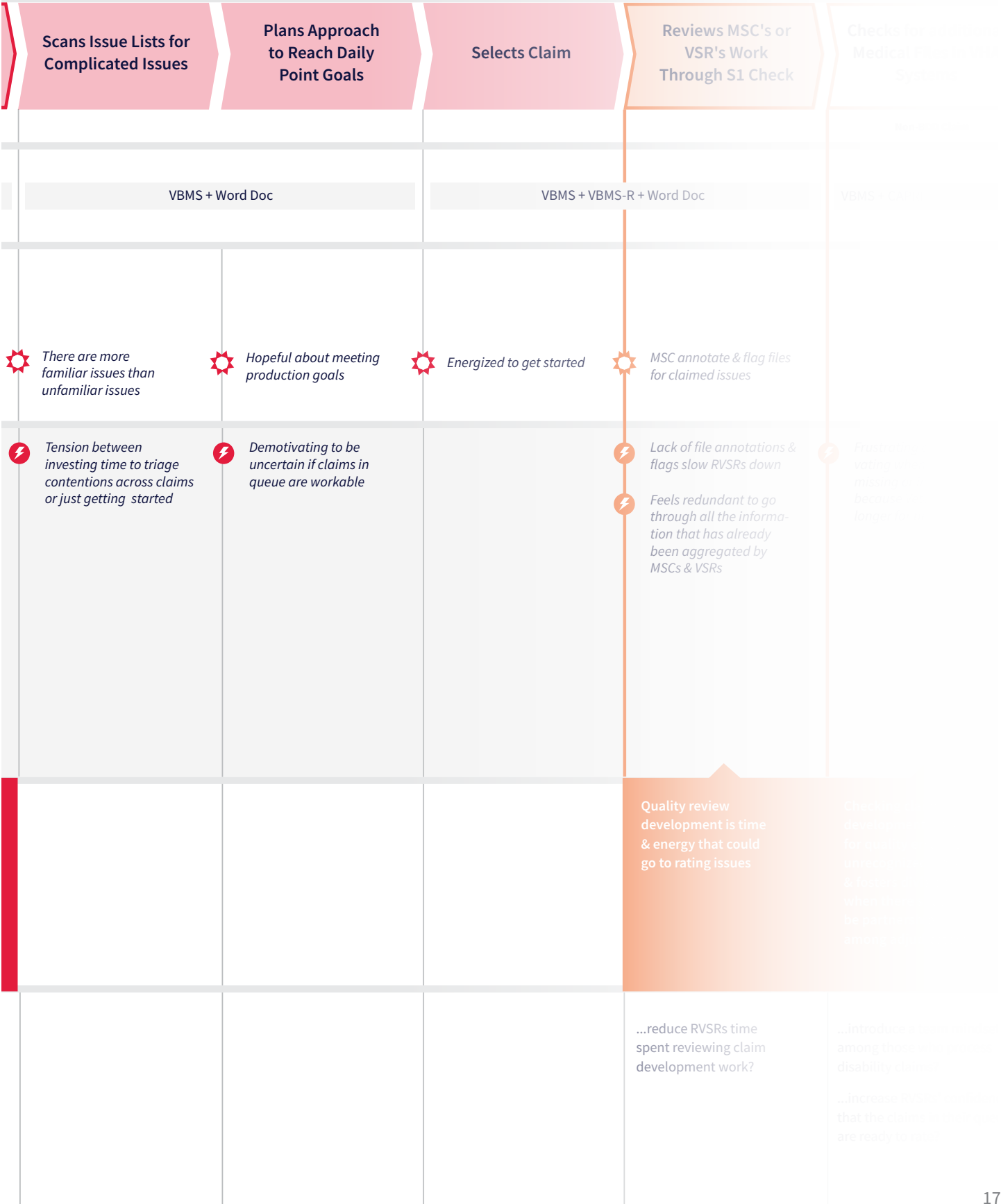
Just the suggestion of change is enough to reduce RVSRs' confidence in their work

**HOW MIGHT WE...**

...align the delivery of policy and protocol changes with the moment this new information will be applied?



QUALITY REVIEW OF DEVELOPMENT



INSIGHT

## Preparing tools provides a sense of control and preparedness to handle the messy work of processing claims

*“Takes discipline to split up time spent on a complex claim over a week (balanced with easier claims to make your production target).”*

— RVSR

*“So I gotta strategize like how I can get points. And I think that I’ve worked here for so long, I know how to do that fairly well. And I won’t let a claim sit too long in my queue. It’s not fair to that veteran, but I definitely will prioritize a list and say, let me knock out three cases first before I worked this more difficult one.”*

— RVSR



### Locus of Control

“Productivity begins with motivation; and motivation begins with control — or more precisely, the location of control.”

— Charles Duhigg

### Assembly Line Mindset

This mindset takes the claim at the top of their queue and works it as long as they can instead of investing time and energy in planning out how to reach their point goals.

INSIGHT

## Changes to policy, protocol, and tools deteriorates RVSRs' confidence

*“Updates happen, you log in, and you’re like “what’s this, where did this go?”*

– RVSR

*“Changes mean stress on employees because errors are a big deal.”*

– DRO

*“I have received 5 different fixes to items already changed in this video. Example MST. We were told that the dev [sic] letter is not to be sent by our RO. I am over quality and how no matter what you do you’re doomed to fail. It’s a punishment system and quality is never there for questions. So learn on your own or fail. Guess most of us will just fail.”*

– QUALITY CALL FEEDBACK

### Cost of Change Mindset

“Change is a problem because everyone has to learn.”

– DRO

### Benefit of Change Mindset

“With so many changes always occurring, we appreciate these updates, reminders, and explanations of tough issues.”

– Quality Call Feedback

MOMENT THAT MATTERS

# Just the suggestion of change is enough to reduce RVSRs' confidence in their work

**How might** we align the delivery of policy and protocol changes with the moment this new information will be applied?

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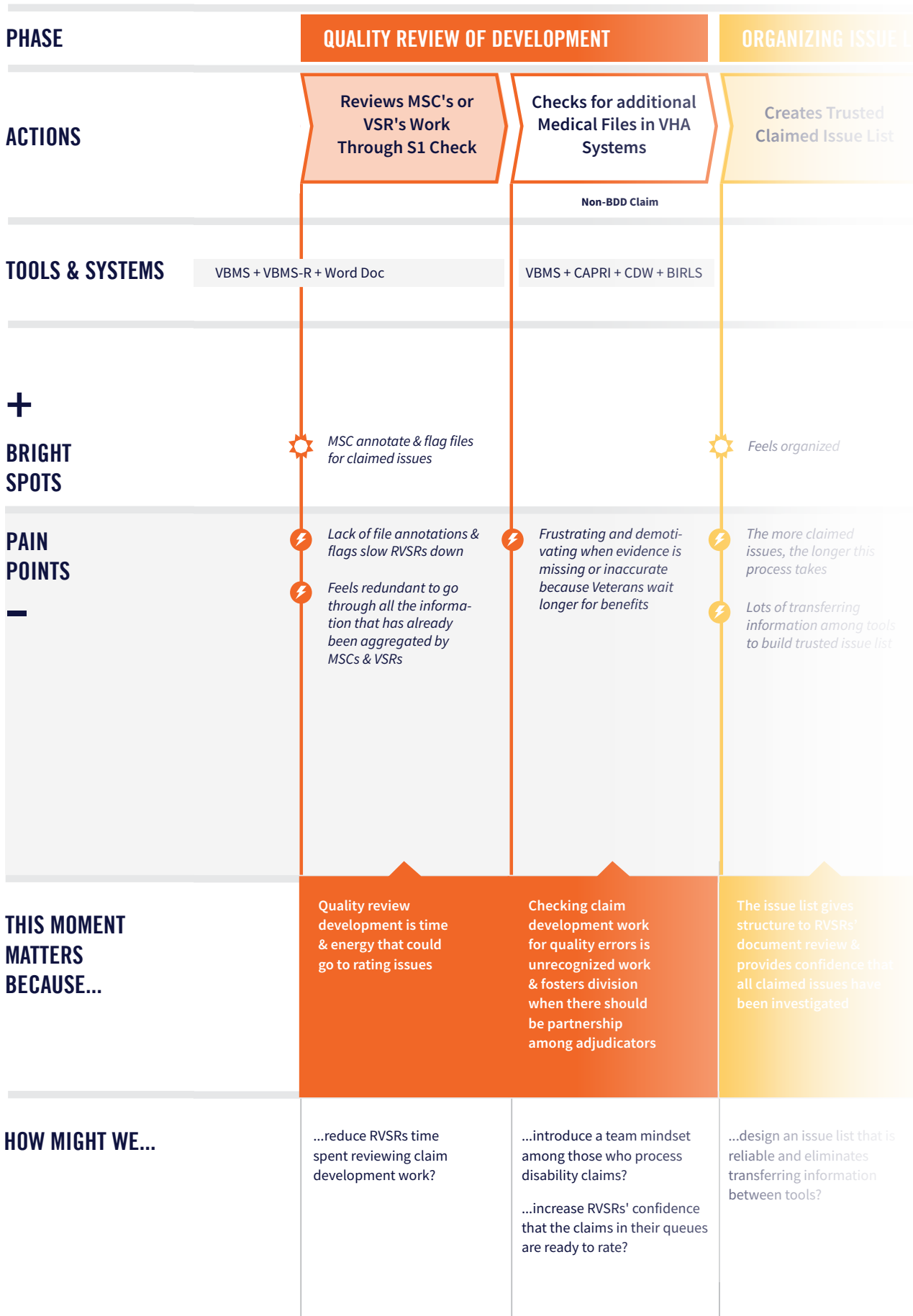
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# 3

## Quality Review of Development

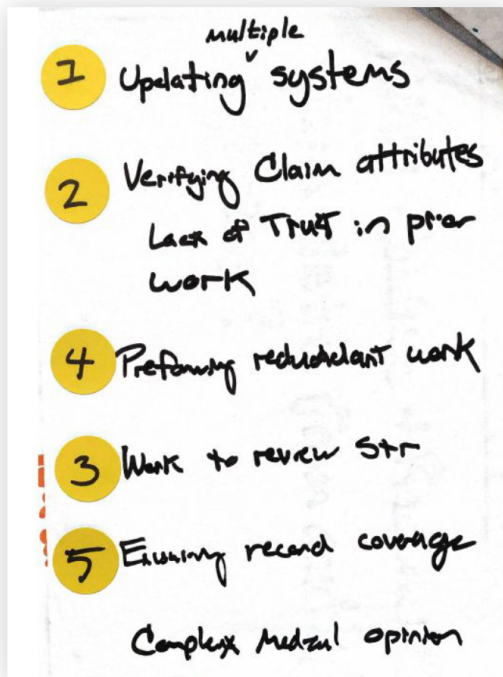
*“You’re always having to go through and recheck everything.”*

—RATING VETERAN SERVICE REPRESENTATIVE



## NOTES

### Top Challenges When Processing Claims



## INSIGHT

# When development is thorough and neat, RVSRs feel set up for success

*“I had a great RVSR. She sat me down and explained what happens. ‘Here’s how you make your points. Here’s how you help me make my points.’ And if there was ever a question, it was always my RVSR. [I’d say] ‘Hey, Elizabeth, look at this here. Tell me what you want me to do.’ Because my terminal digits were her terminal digits. So if I was successful, she was going to be successful.”*

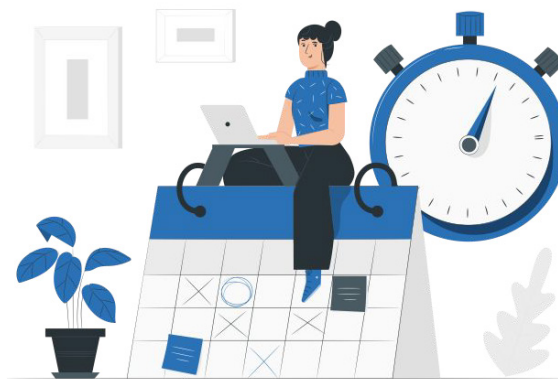
— VSR COACH

*“If you had a unified standard for document naming & document types then I could import and find evidence efficiently for all decisions I make.”*

— RVSR

*“I had a claim the other day where the VSR had organized all the files, renamed them, and annotated them so it was so easy for me to find all the evidence for each issue. And I was like....I could have just kissed his feet!”*

— RVSR





## INSIGHT

# When development is incomplete, messy, and inconsistent, RVSRs feel frustrated and let down by their colleague

*“VSR gathers information but may not look into details. Will look for a sleep study but not look for things like x-rays or biopsies.”*

— RVSR

*“Success for VSRs is the least amount of time in queue.”*

— VSR COACH

*“Do your VSRs now have [a partnership with an RVSR] now? No. Do you see people developing that relationship informally? Of course. You have to. How do you see VSRs develop these relationships with RVSRs? Just looking to see who’s in the office.”*

— VSR COACH



### Psychological Safety

“Studies also show that people working in teams tend to achieve better results and report higher job satisfaction. In a 2015 study, executives said that profitability increases when workers are persuaded to collaborate more.”

— Charles Duhigg

MOMENT THAT MATTERS

# Quality review development is time and energy that could go to rating issues

**How might we** reduce RVSRs time spent reviewing claim development work?

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# Checking claim development work for quality errors is unrecognized work and fosters division when there should be partnership among adjudicators

**How might we** introduce a team mindset among those who process disability claims?

**How might we** increase RVSRs' confidence that the claims in their queues are ready to rate?

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# 4

## Organizing Issue List

*“I’ve also been doing this for 10 years and I have a process down. I keep notes. I know some people don’t keep notes. And I’m like, how do you keep your brain organized and just make sure that you don’t forget something? When I take notes, I write down the evidence ‘cause we have to list all the evidence. So I make sure that I’ve not missed any evidence.*

—RATING VETERAN SERVICE REPRESENTATIVE

# NOTES

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Name:	
SSN:	
EP Code	0
Branch/Dates:	
POA:	
VAE Exams:	
Claim Date:	
Effective Date:	
VCAA:	
VA LTR + extra info	
Dominant Hand:	L / R

Section (§) 5103 Notice, dated  
Certificate of Release or Discharge from Active Duty for periods of  
STR's received  
Military Personnel Records, received  
0995 Decision Review Request; Supplemental Claim  
0966 Intent to file a claim for compensation and/or pension, or survivors pension and/or DIC  
VA Notification Letter, dated XXXXXX, acknowledging receipt of your application for VA benefits  
VA Notification Letter, dated XXXXXX, acknowledging receipt of your intent to file a claim for compensation











- 1- 

Claimed Disability:	
VA Disability:	
DC:	
Rating %:	
  
- 2- 

Claimed Disability:	
VA Disability:	
DC:	
Rating %:	
  
- 3- 

Claimed Disability:	
VA Disability:	
DC:	
Rating %:	
  
- 4- 

Claimed Disability:	
VA Disability:	
DC:	
Rating %:	

PHASE	ORGANIZING ISSUE LIST		AGGREGATING EVIDENCE WHILE BUILDING ISSUE LIST	
ACTIONS	Creates Trusted Claimed Issue List	Consolidates Claimed Issues Rated Similarly	Chronologizes Medical Evidence Files	Seeks Evidence for Each Issue
TOOLS & SYSTEMS				VBM
<b>+</b> BRIGHT SPOTS	 Feels organized	 Clear in what issues to research & rate		
<b>-</b> PAIN POINTS	 The more claimed issues, the longer this process takes  Lots of transferring information among tools to build trusted issue list	 Requires experience & medical knowledge to know which issues are rated the same or are related medically  Must research newer medical conditions not included in the VASRD to determine an analogous issue for rating	 Time spent chronologizing is not recognized in production point system  Chronologizing files is manual & cannot be saved	 Extremely difficult to find evidence if the files are not organized & searched  Not all medical conditions are created or constantly updated in evidence management sense & is not
<b>THIS MOMENT MATTERS BECAUSE...</b>	The issue list gives structure to RVSRs' document review & provides confidence that all claimed issues have been investigated		A high number of contentions is fun for some & overwhelming for others	
<b>HOW MIGHT WE...</b>	...design an issue list that is reliable and eliminates transferring information between tools?		...design a playful approach to translating claimed issues to make the task more manageable?	

## INSIGHT

# Issue lists are: “to-do” lists, keyword search lists, and ultimately the ground RVSRs build their decision upon

*“Sometimes you need to separate issues: Veteran claims Bilateral knee and I have to separate into left knee and right knee.”*

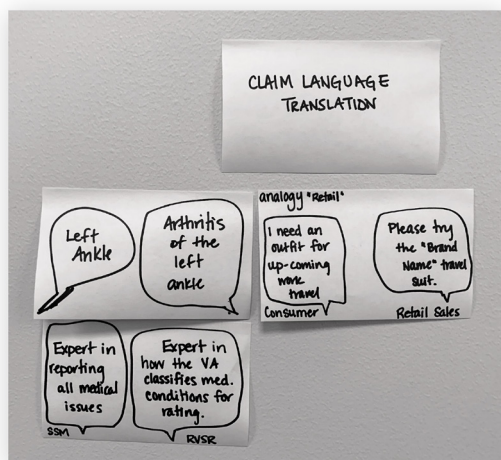
— RVSR

*“Sometimes you can look in the VBMS-Core issue list and combine them but other times you need a medical opinion.”*

— RVSR

*“Would be helpful if I could merge issues together for cases where the veteran is filing for the same issue multiple different ways.”*

— RVSR





## INSIGHT

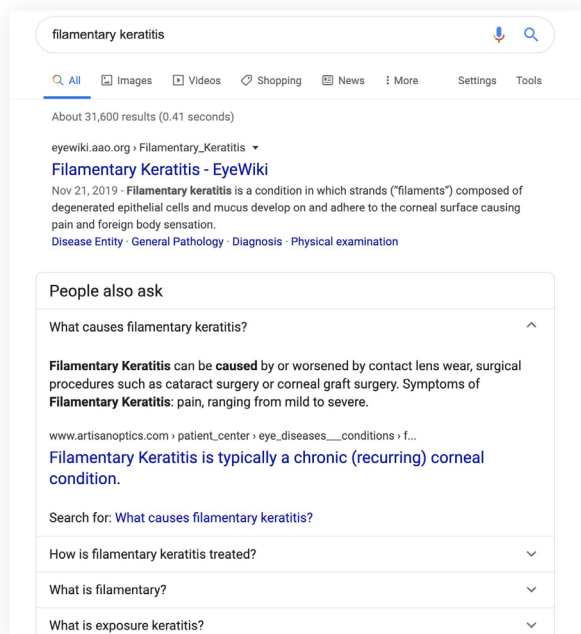
# RVSRs self-educate on medical conditions to choose the correct VASRD and understand how medical contentions might be related

*“I have to Google a lot when it comes to eyes. They just, they just are things you’ve never heard of. Like I’m familiar with diabetes and [...] I know what hearing loss is and I know what knee arthritis is, but when it comes to the eyes, it’s just unfamiliar.”*

— RVSR

*“Yesterday on this claim [I had an issue I used Google to understand]. It was, “filamentary keratitis”. So I would just like put it in Google. I’ll just type it in and see what it is because we don’t have that diagnosis listed in the rating schedule.”*

— RVSR



MOMENT THAT MATTERS

# The issue list gives structure to RVSRs' document review and provides confidence that all claimed issues have been investigated

**How might we** design an issue list that is reliable and eliminates transferring information between tools?

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MOMENT THAT MATTERS

# A high number of contentions is fun for some and overwhelming for others

**How might we** design a playful approach to translating claimed issues to make the task more manageable?

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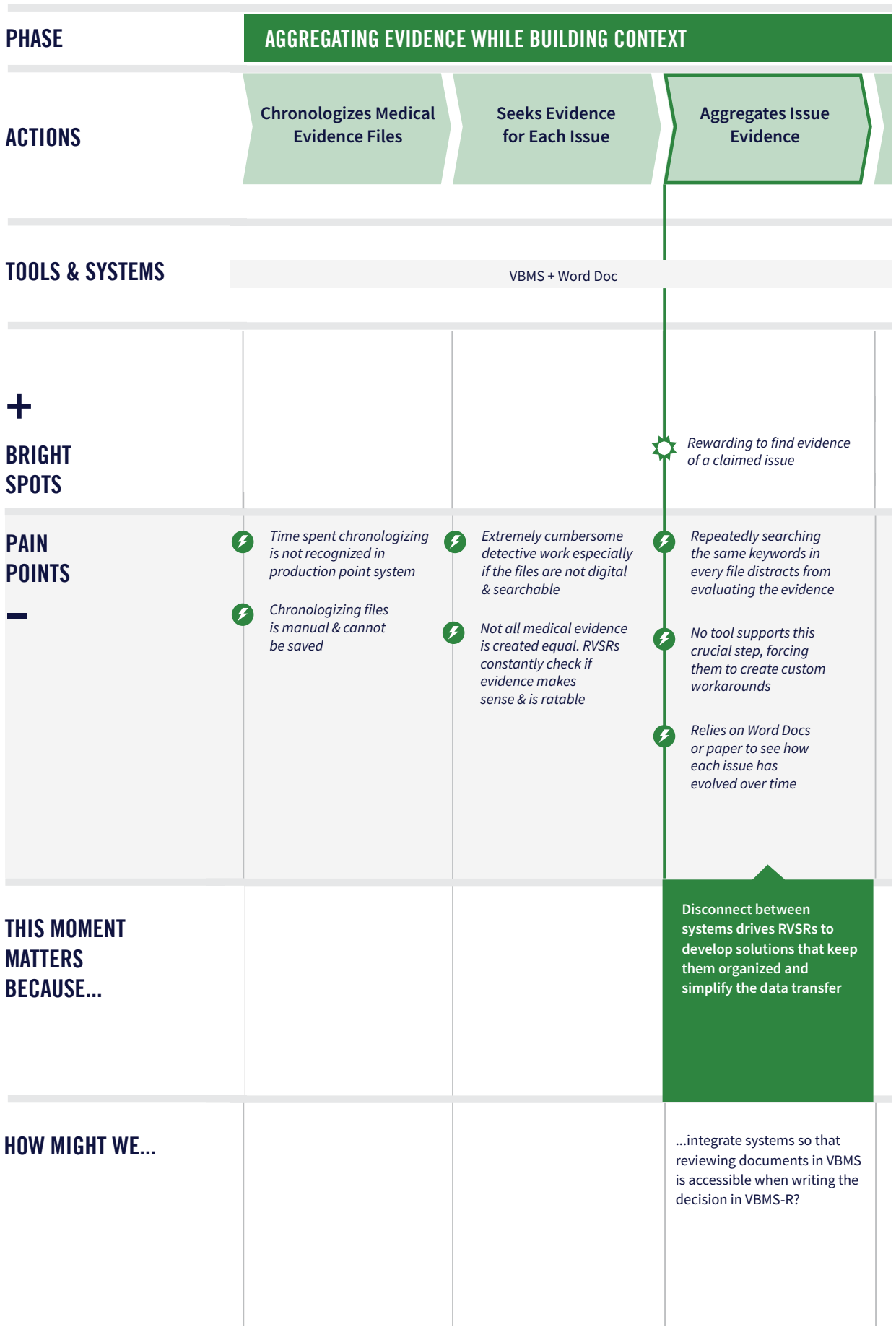


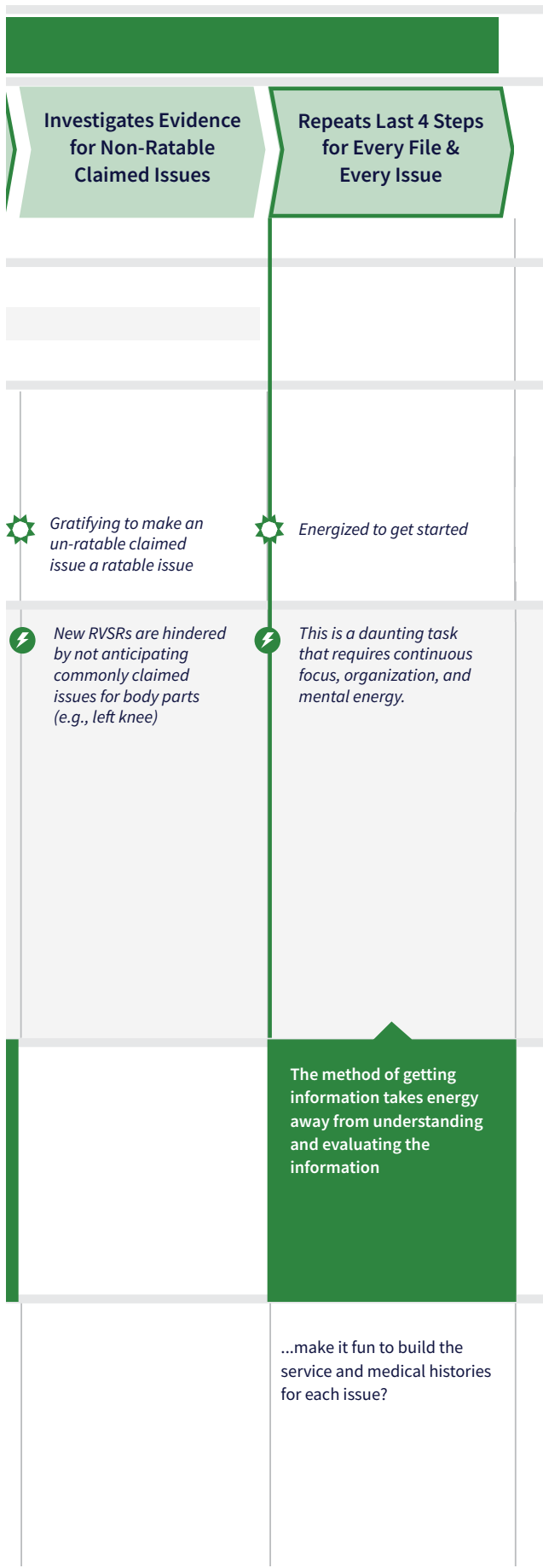
# 5

## Aggregating Evidence While Building Context

*You know, we're working to serve Veterans and get them an answer and get their money right. And if their money is right and we've granted them what we can, I think we've done our job.*

—RATING VETERAN SERVICE REPRESENTATIVE





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INSIGHT

# Translating non-ratable claimed issues into ratable claimed issues is the strategic value RVSRs provide

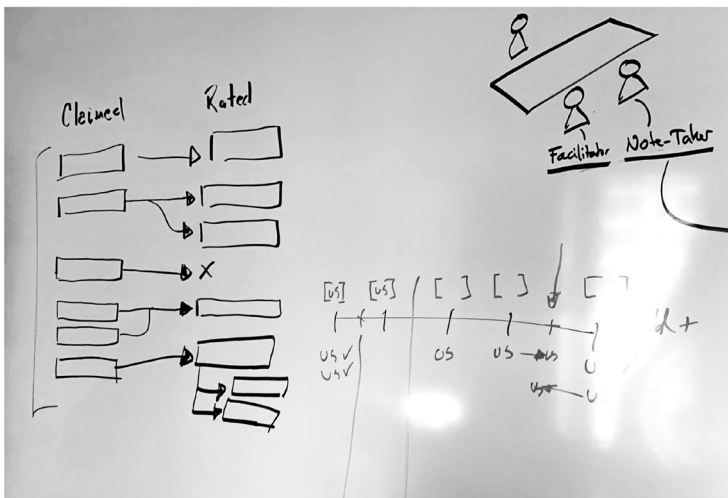
One issue can become many issues (e.g. SSM claimed “Left Knee”).  
Rater shared that after reviewing the SSM’s STR:

“I found 3 things I can rate related to his knees.”

— RVSR OBSERVATION

“Diabetes is a disease process with residuals. A SSM might claim Diabetes as well as Residuals as separate line items. The RVSR has to not only nest the residuals as part of Diabetes but needs to tell this translation story to the Claimant when writing the narrative. Additionally, once a residual hits a particular level it’s get broken out from under Diabetes and is rated on it’s own.”

— RQRS





## INSIGHT

# Document review is a mountain of unknown size and difficulty since the complexity of the Servicemember's medical history is unknown until all the files are opened and reviewed

*“Everything that is mandatory for me to consider, I pull into a Word document. It helps me know that I’ve reviewed it. That way I know that I’m not missing something.”*

— RVSR

*“I’m going to just you I’m just going to open them all up first. That way, they’re all open. And I’ll just start reviewing and close them out.”*

— RVSR

*“Right now I’m looking at a 557 page STR on a 9 issues. Actually 10 throwing the last issue in there. So it takes time and and I’m big on detail. I want the examiner to know everything that veterans have. You know if it’s just a knee, when and how many times he was treated because I don’t want the examiner looking at the exams that were done on this veteran.”*

— DRO



MOMENT THAT MATTERS

# Disconnect between systems drives RVSRs to develop solutions that keep them organized and simplify the data transfer

**How might we** integrate systems so that reviewing documents in VBMS is accessible when writing the decision in VBMS-R?

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MOMENT THAT MATTERS

# The method of getting information takes energy away from understanding and evaluating information

**How might we** make it fun to build the service and medical histories for each issue?

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## ACTIVITY

Your first task is to go down both columns, calling out whether each word is printed in lowercase or in uppercase. When you are done with the first task, go down both columns again, saying whether each word is printed to the left or to the right of center by saying (or whispering to yourself) “LEFT” or “RIGHT.”

LEFT		upper	
	left	lower	
right			LOWER
RIGHT		upper	
	RIGHT	UPPER	
	left		lower
LEFT			LOWER
	right		upper

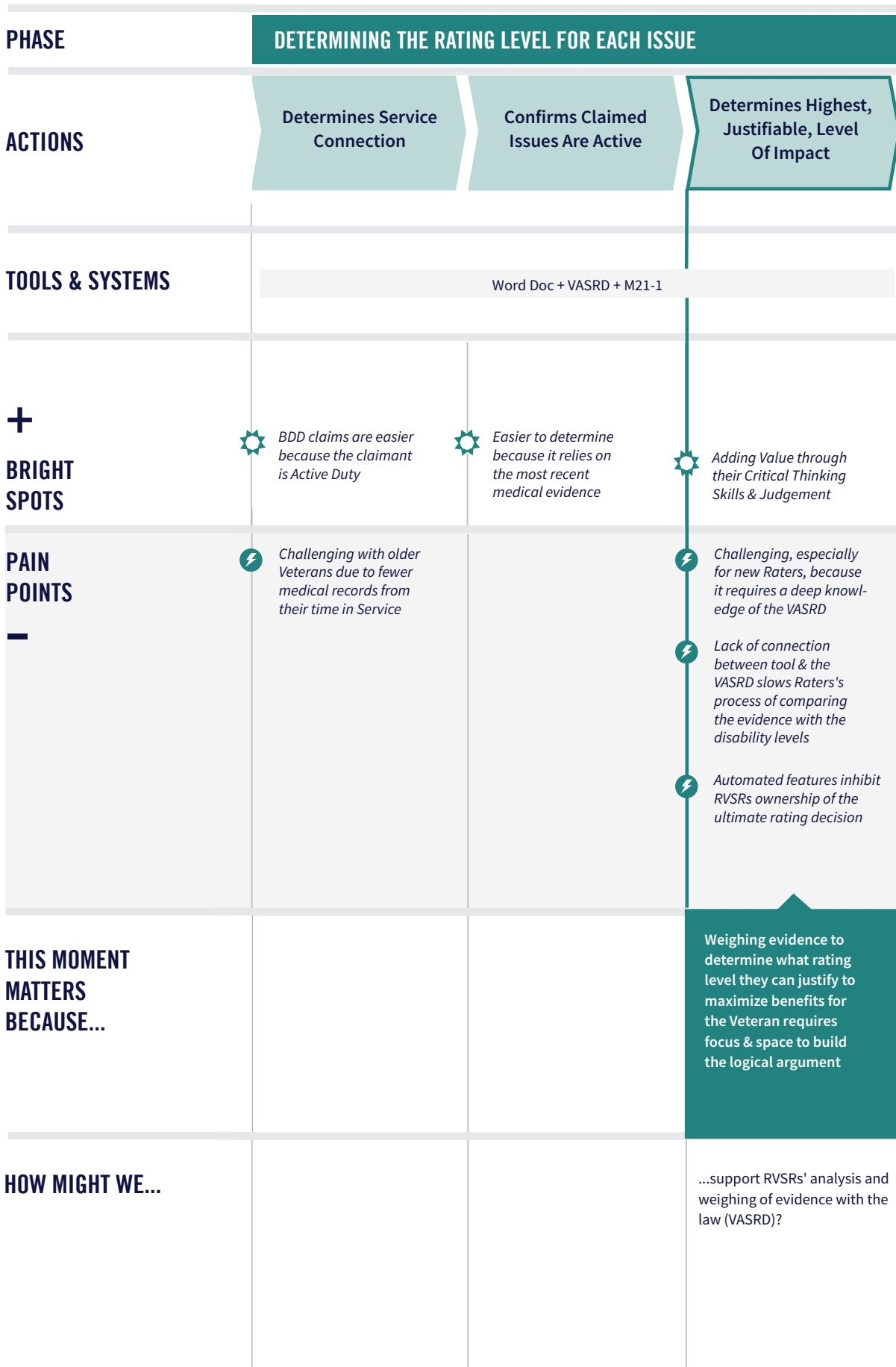
# 6

## Determining the Rating Level for Each Issue

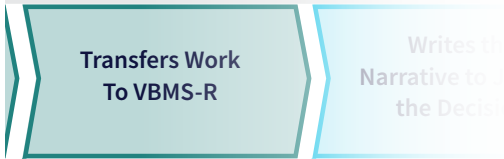
*What makes you feel confident in your rating decision?*

*My knowledge.*

—RATING VETERAN SERVICE REPRESENTATIVE



**WRITING THE RATING DECISION**



Word Doc + VBMS

RVSRs' work along way is paying off

- ⚡ Calculators seem to give the final answer but only provide a suggested rating. The final rating decision rests with the RVSR
- ⚡ Tedious (lots of copying & pasting)
- ⚡ Frustrating when feeling unsure about the output of a calculator
- ⚡ New RVSRs feel unsure in selecting and filling in the correct calculators

This is when errors are made that lead to incorrect rating decisions

This is another way to check themselves as they type their rationale for the rating decision

...help RVSRs in preventing errors in calculator selection and data entry?

...eliminate the need for the word doc and develop a platform that supports the actual writing of the rating decision?

**NOTES**

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## INSIGHT

# Arriving at a rating decision is as much art as science as RVSRs weight all the evidence with the VASRD providing the legal guardrails

*“There’s so much evidence and information that can go into making and reading decision--multiple exams and just the level of detail you sometimes have to go through to come to a decision. It seems like thinking you can simplify all that into just an automated decision. It just doesn’t compute to me, I guess.”*

— BUSINESS REQUIREMENTS ANALYST, OBPI

*“Anything we do with rating has a touch of gray in it.”*

— TRAINING LEADERSHIP

## INSIGHT

# There is an inconsistency in how RVSRs utilize the calculator outputs. Some regard it as the law whereas others see it as a gutcheck

*“We’ve actually given errors when raters just automatically use what evaluation builder says they should.”*

— QUALITY REVIEW COACH

*“We gained efficiency but people are becoming too reliant on programs and are losing the ability to make the decision.”*

— TRAINING LEADERSHIP AND FORMER RVSR

*“AMA is probably kind of the beginning of getting us or putting us in the sweet spot. As far as the balance between the automation (calculators) and then being able to actually exercise judgment and, and weigh evidence and probative value and stuff.”*

— QUALITY REVIEW COACH



## INSIGHT

# Inputting data to VBMS-R is a very monotonous, tedious, and repetitive task that requires constantly switching from one tool to another

*“I don’t trust VBMS to put them [references] in, I have a Word doc and I copy and paste.”*

— RCSR

*“Have this (VASRD Manual) reference in a separate Word document; copy and paste into VBMS-R.”*

— RCSR



### Attention

Reducing the number of places RCSRs go to get needed information is a key opportunity to improving efficiency and accuracy

## INSIGHT

# RVSRs are reliant on programs that hand out decisions and, as a result, are losing autonomy and decision making authority

*“Eval Builder is an unfortunate tool. We have made a group of dummies for RVSRs and I hate to say it, but it is true. We put too much automation into the making of a decision.”*

— QUALITY REVIEW SPECIALIST

*“Yeah, I’ve actually worked on quite a few automation things. We’ve tried it several times and it hasn’t gone anywhere yet. And the main reason is that the Raters still own the decision. So even if the system automates and populates data and tells [RVSRs] ‘this is what your decision should be.’ Ultimately it will be the Rater’s signature on that decision.”*

— BUSINESS REQUIREMENTS ANALYST OBPI

*“You shouldn’t necessarily go with what Evaluation Builder spits out because there’s still the judgment call.”*

— QUALITY REVIEW SPECIALIST

## INSIGHT

# Calculators introduce other pitfalls that lead to rating errors while providing baselines for rating decisions

### Key Calculator User Challenges:

- Hard to know what calculator to choose when the issue does not match the calculator name
- Calculators often present incongruent data entry (e.g., where data for left body parts are on the right-side) which slows the process
- It takes time and consulting experienced RVSRs to learn which calculator fields to fill in and which ones to leave blank
- Calculators are challenging for new RVSRs because the user experience assumes a deep knowledge of the VASRD

MOMENT THAT MATTERS

# Weighing evidence to determine what rating level they can justify to maximize benefits for the Veteran requires focus & space to build the logical argument

**How might we** support RVSRs’ analysis and weighing of evidence with the law (VASRD)?

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MOMENT THAT MATTERS

# This is when errors are made that lead to incorrect rating decisions

**How might we** help RVSRs prevent errors during calculator selection and data entry?

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# 7








## Writing the Story & Finalizing the Claim

*When you build a rating you build it? Well, me personally, like I said, I like a lot of meat. I like a lot of detail to the Veteran. I want to explain to the Veteran from beginning to end, why we're service connecting, why we're granting what we're granting, and, why we're denying. Sometimes there is nothing to give but I'll try to explain why we're not giving it.*

—RATING VETERAN SERVICE REPRESENTATIVE





PHASE	WRITING THE STORY & FINALIZING THE CLAIM			
ACTIONS	Writes the Narrative to Justify the Decision	Populates Narrative Box with Evidence & Guiding Law	Reviews Veteran's Claim Letter For Completeness	Records Points Earned
TOOLS & SYSTEMS	Word Doc + VBMS-R		VBMS-R	Word Doc / Excel
+ BRIGHT SPOTS	 RVSRS' work along the way is paying off		 Feeling accomplished	 Production points are per issue rated. After completing claim, RVSRS document the exact number of issues rated   Returning to the strategy & selecting the next claim
- PAIN POINTS		 VBMS-R provides a small text box to write & review the narrative   The required legal language makes it harder for Veterans to understand the decision   Does my logic make sense? Did I miss anything?		
THIS MOMENT MATTERS BECAUSE...	This is another way to check themselves as they type their rationale for the rating decision  Serving Veterans is what motivates RVSRS and the narrative is their only direct communication with them			
HOW MIGHT WE...	...eliminate the need for the word doc and design a platform that supports the actual writing of the rating decision?	...encourage a personal connection between RVSRS and Veterans when sharing the claim decision?		

## INSIGHT

# It is extremely motivating to be able to grant a Veteran with the correct disability rating and see how their work matters as they make Veterans' lives better

*“As an RVSR, I want the SSMS / Veterans to feel cared for and confident that I reviewed every document in their files and considered all the information when making a decision.”*

— RVSR OBSERVATION QUOTE

*“You know, we’re working to serve Veterans and get them an answer and get their money right. And if their money is right and we’ve granted them what we can, I think we’ve done our job.”*

— RVSR

*“What helps you feel confident that a claim is ready for review?”*

*“My notes. I make note of all my decisions and annotations of everything.”*

— VSR COACH

## INSIGHT

# Veteran Disability Claim letter is an opportunity to have a more personal connection with the Veteran and enhance VA's Customer Service

*“I give the Veteran the info that I find to make them confident that I looked through things.”*

— RVSR

*“When you build a rating you you build it? Well, me personally, like I said, I like a lot of meat. I like a lot of detail to the Veteran. I want to explain to the Veteran from beginning to end, why we’re service connecting, why we’re granting what we’re granting, and, why we’re denying. Sometimes there is nothing to give but I’ll try to explain why we’re not giving it.”*

— QUALITY REVIEW SPECIALIST

## INSIGHT

**While writing the narrative is thought of as the last step, after all the decisions have been made, it is often while writing out their decisions that RVSRs solidify their understanding of the Veteran and catch their own errors**

*“We are dealing with a complex set of laws and a complex medical system, and trying to get those two to play nice. [It] sometimes helps to talk things out in your head or write it out so that you fully understand what’s going on.”*

— RVSR

*“I give the Veteran the info that I find to make them confident that I looked through things.”*

— RVSR

*“Writing out a story of what raters have done, reached their decisions, builds in checks and balances.”*

— RQRS

MOMENT THAT MATTERS

# This is another way to check themselves as they type their rationale for the rating decision

**How might we** eliminate the need for the Word document and design a platform that supports the actual writing of the rating decision and the cognitive efforts that go into it?

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MOMENT THAT MATTERS

# Serving Veterans is what motivates RVSRs and the narrative is their only direct communication with them

**How might we** encourage a personal connection between RVSRs and Veterans when sharing the claim decision?

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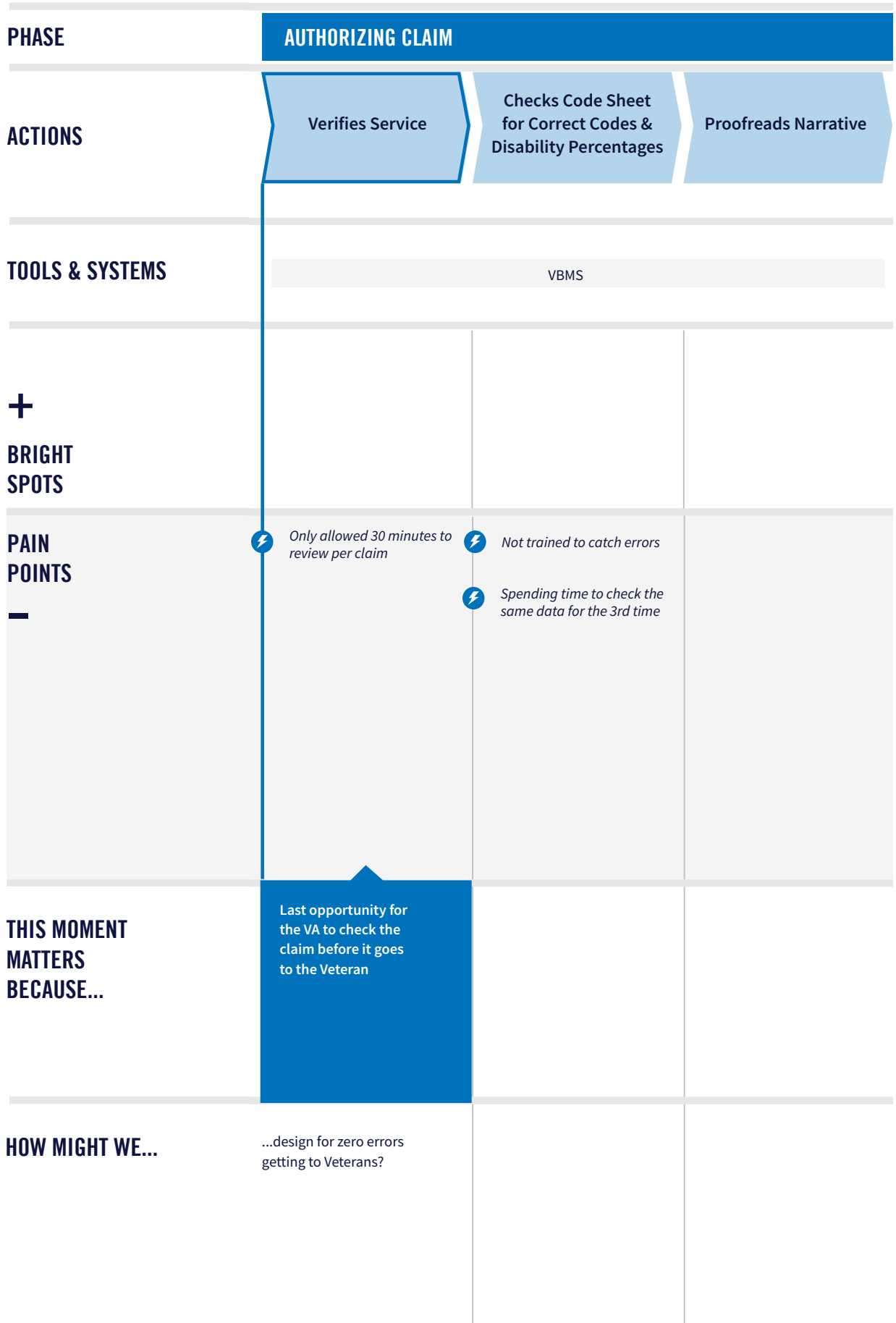


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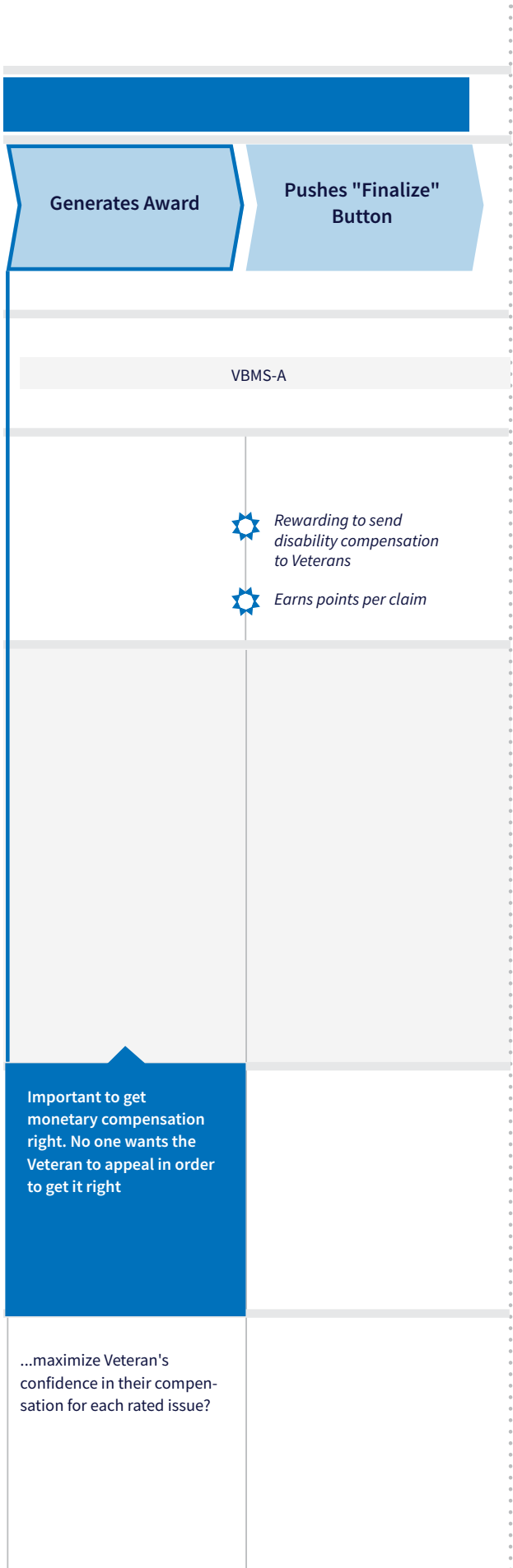
## Authorizing the Claim

*If the Post VSR thinks there's an error they should reach out to the RVSR. Almost always done on IM -- you have to be extremely professional and say "Hey, did you mean to do this?"*

—RATING VETERAN SERVICE REPRESENTATIVE







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## INSIGHT

# **Even though this phase is the last checkpoint to catch errors before they get to the hands of the Veteran, Post-VSRs are not set up for success**

This phase is the last opportunity to make sure the rating decision is error-free

However:

- Post-VSRs are not trained to catch rating decision errors
- The allotted time of 30 minutes to check a claim is not enough to thoroughly go through it depending on the complexity of the claim



MOMENT THAT MATTERS

# Last opportunity for the VA to check the claim before it goes to the Veteran

How might we design for zero errors getting to Veterans?

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MOMENT THAT MATTERS

# Important to get monetary compensation right. No one wants the Veteran to appeal in order to get it right

**How might we** maximize Veteran's confidence in their compensation for each rated issue?

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# 9

## Claim Quality Review

*I'll tell you what I know is, is probably the most difficult transition. And that is when we're in training, our focus is on quality. Okay? We've got to teach them where the corners are before they can cut any corners. If you're not saying, um, so, uh, making the transition from being mostly quality based to being quality and production based. That's the hardest part, is teaching someone to be fast and good at the same time.*

—RATING VETERAN SERVICE REPRESENTATIVE

PHASE

ACTIONS

TOOLS & SYSTEMS



BRIGHT SPOTS

PAIN POINTS

THIS MOMENT MATTERS BECAUSE...

HOW MIGHT WE...



CLAIM COMPLETE

Claim sent for printing & mailing to Veteran



Authorization Quality Review Specialist (AQRS), Rating Quality Review Specialist (RQRS)

QUALITY REVIEW OF DEVELOPMENT\*

Completes Quality Checklist

Determines Quality Rating for Claim

VBMS + VBMS-R + Salesforce



Confirms Veterans are accurately compensated



Earns points per claim



Everyone loses when an error is discovered in this phase



Rarely encourages RVSRs for quality work, mostly provides punitive feedback



Isolated, not feeling on the same team with Adjudicators

VA is assessing the quality of service provided to Veterans

Quality errors is a key way Adjudicators learn. However, all errors, even system errors, are punitive

...expand definition of quality and how it is measured to include Veteran centered metrics?

...incorporate non-punitive quality reviews throughout the process?



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*"Did they make the right decision. Did they get all of the evidence, not the technical aspects of the system necessarily. We don't look at too much of that. We look at was the decision correct. And did we provide the right notice to the Veteran?"*

— QUALITY REVIEW SPECIALIST

*Now on the quality review team: "we're kind of an audit team. We look at quality and make sure that the Raters are making the right decisions. We're paying the right money."*

— QUALITY REVIEW SPECIALIST

## INSIGHT

# The Quality Review Team is seen more as police than as colleagues due to the punitive nature of quality reviews even if the error was not RVSR's fault

*“Error can not be in detriment to the Veteran but just wasn't in line with VA's 'best practices.’”*

— RVSR

*“Error will still count against me even if it was incorrectly inputted into the system.”*

— RVSR

*“I just feel like quality a lot of times is working against us. They're literally in contradiction of our goals.”*

— RVSR

*“Been so many years since quality people have rated that they don't even know how to use VBMS-R.”*

— RVSR

INSIGHT

## Being penalized for mistakes and not being rewarded for accomplishments destroys Psychological Safety and being publicly chastised for errors makes it hard to see it as a growth opportunity

*“Changes mean stress on employees because errors are a big deal.”*

— RVS

*“Errors impact employees’ lives - commute, professional growth, and employment.”*

— DRO

*“I don’t mind an error if I actually learn from it, especially if it’s something that would affect the Veteran’s rating.”*

— RVS

MOMENT THAT MATTERS

# VA is assessing the quality of service provided to Veterans

**How might we** expand definition of quality and how it is measured to include Veteran centered metrics?

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MOMENT THAT MATTERS

# Quality errors is a key way Adjudicators learn. However, all errors, even system errors, are punitive

**How might we** incorporate non-punitive quality reviews throughout the process?

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# Employee Impact

## Improving Productivity

These are four factors that impact productivity which we observed during our qualitative research and believe we can impact through organizational change, systems, and tools to support the workflow



### Motivation

General willingness of someone to do something



### Attention

Concentration on a task



### Psychological Safety

A shared belief held by members of a team that the team is safe for interpersonal risk taking



### Playful Orientation

Intentional reframing of a situation or a task to make it more enjoyable



## Motivation

Motivation is the general desire or willingness of someone to do something. It is enhanced when:

- Employees feel in charge of their future, their successes, and their failures
- Employees perceive that their work has meaningful impact on others



*“Often our productivity struggles are caused not by a lack of efficiency, but a lack of motivation.”*

*“At the heart of meaningful work is the belief that your job makes other people’s lives better.”*

— ADAM GRANT, ORGANIZATIONAL PSYCHOLOGY PROFESSOR AT WHARTON



## Psychological Safety

Psychological safety is feeling free from the fear of ridicule, judgment, or punishment for asking questions, sharing ideas, and creative work

- Psychological safety is both fragile and vital to success in uncertain and interdependent environments
- Employees thrive in environments and teams where they feel they are safe to make decisions, creatively solve problems and freely raise issues
- Psychological safety is fundamentally threatened in organizational cultures where making mistakes or errors in work has severe punitive consequences which, in turn, hinders employees’ productivity and motivation



*“Google’s data indicated that psychological safety, more than anything else, was critical to making a team work.”*

— CHARLES DUHIGG, PULITZER PRIZE WINNING REPORTER & NYT BEST SELLING AUTHOR



## Attention

Attention management is the art of focusing on getting things done for the right reasons, in the right places, and at the right moments

- Interruptions and workflows that require employees repetitively to switch back and forth among various tools or tasks has a significant negative impact in their productivity due to dividing their attention
- It takes on average 23 minutes and 15 seconds to return to the original task after an interruption



*“Design has the power to control the human mind during and even beyond the interaction with the product.”*

— MARTIN JANCIK, PRODUCT DESIGNER AT KIWI.COM

## Playful Orientation to Work

A playful orientation to a task increases attention, persistence, positivity, and overall productivity

- A behavioral orientation superimposed on work tasks
- Celebrating and positively reinforcing task completion and desired behaviors



*“Some think of “play” as frivolous — a distraction, or worse, a waste of time. In the office, play is often regarded as a break from “real work”. But what if the opposite of play isn’t work, it’s boredom? What if work could actually benefit from play?”*

— BRENDAN BOYLE, IDEO PARTNER



# Adjudicator Mindsets

## Approach to Production Goals

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### Strategist

Having a strategy that balances large, small, simple, and complex claims, then maximizing points per claim whenever possible

### Assembly Line

Just taking the next claim in the queue and getting as many points out of it as possible

## Response to Claim Problems

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### Team

Attempts to connect directly with the person to solve the issue. This could mean calling the Veteran or messaging a fellow VA employee

### Manual Protocol

Will defer a claim over attempting to solve a problem over the phone or email first

## Response to Change

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### Cost of Change

Wants to be convinced of how this change makes a positive impact on Veterans and on their ability to do this work well. Sees it as a negative thing and a disruption to the workflow

### Benefits of Change

Recognizes the need for improvement and expresses open-mindedness at trying new features or tools

## Approach to Work

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### Performance Review Driven

Knowing production goals are tied to performance reviews a specific is the primary motivator for Adjudicators with this mindset to progress claims.

*“I think it’s good because I think I had some sandbaggers I think I had some folks that could have given me more. And I think that they knew that there was no production standard.”*

— LOCAL QUALITY REVIEW SPECIALIST

*“I know why we need production because we have people that won’t get the work done unless they have these goals.”*

— RATING VETERAN SERVICE REPRESENTATIVE

## **Thank You!**

If you have any further inquiries, comments, or concerns after this workshop, feel free to get in touch with us!

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