Pre-Discharge Redesign

 Instructor Lesson Plan

Time Required: 1 Hour

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| Lesson Description |
| The information below provides the instructor with an overview of the lesson and the materials that are required to effectively present this instruction. |
| TMS # | 4315810 |
| Prerequisites | Prior to this lesson, the Military Service Coordinators (MSCs) or other Benefits Delivery at Discharge (BDD) claims processors should have pre-discharge claims adjudication and/or award generation and authorization experience. |
| target audience | The target audience for Pre-Discharge Redesignis Military Service Coordinators (MSCs) or other BDD claims processors.Although this lesson is targeted to teach the MSC or other BDD claims processors, it may be taught to other VA personnel as mandatory or refresher type training. |
| Time Required | 1 hour |
| Materials/TRAINING AIDS | Lesson materials:* Pre-discharge redesign PowerPoint presentation
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| Training Area/Tools  | The following are required to ensure the trainees are able to meet the lesson objectives: * Classroom or private area suitable for participatory discussions
* Seating, writing materials, and writing surfaces for trainee note taking and participation
* Handouts, which include a practical exercise
* Large writing surface (easel pad, chalkboard, dry erase board, overhead projector, etc.) with appropriate writing materials
* Computer with PowerPoint software to present the lesson material

Trainees require access to the following tools: * VA TMS to complete the assessment
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| Pre-Planning  | * Become familiar with all training materials by reading the Instructor Lesson Plan while simultaneously reviewing the corresponding PowerPoint slides. This will provide you the opportunity to see the connection between the Lesson Plan and the slides, which will allow for a more structured presentation during the training session.
* Become familiar with the content of the trainee handouts and their association to the Lesson Plan.
* Practice is the best guarantee of providing a quality presentation. At a minimum, do a complete walkthrough of the presentation to practice coordination between this Lesson Plan, the trainee handouts, and the PowerPoint slides and ensure your timing is on track with the length of the lesson.
* Ensure that there are copies of all handouts before the training session.
* When required, reserve the training room.
* Arrange for equipment such as flip charts, an overhead projector, and any other equipment (as needed).
* Talk to people in your office who are most familiar with this topic to collect experiences that you can include as examples in the lesson.
* This lesson plan belongs to you. Feel free to highlight headings, key phrases, or other information to help the instruction flow smoothly. Feel free to add any notes or information that you need in the margins.
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| Training Day  | * Arrive as early as possible to ensure access to the facility and computers.
* Become familiar with the location of restrooms and other facilities that the trainees will require.
* Test the computer and projector to ensure they are working properly.
* Before class begins, open the PowerPoint presentation to the first slide. This will help to ensure the presentation is functioning properly.
* Make sure that a whiteboard or flip chart and the associated markers are available.
* The instructor completes a roll call attendance sheet or provides a sign-in sheet to the students. The attendance records are forwarded to the Regional Office Training Managers.
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| Introduction to Pre-Discharge Redesign  |
| INSTRUCTOR INTRODUCTION | Complete the following:* Introduce yourself
* Orient learners to the facilities
* Ensure that all learners have the required handouts
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| time required | 0.25 hours |
| Purpose of LessonExplain the following: | Pre-discharge claims have undergone a redesign which has adjusted the process for adjudicating claims that are received prior to a service member’s (SM) discharge from active duty. The purpose of this training is to inform the audience of the major changes. |
| Lesson ObjectivesDiscuss the following:Slide 2 | In order to accomplish the purpose of this lesson, the MSC or other BDD claims processors will be required to accomplish the following lesson objectives.TheMSC or other BDD claims processors will be able to: * Identify Pre-discharge Benefits Delivery at Discharge (BDD) and BDD excluded claims
* Recognize end products (EP) required to track claims received prior to discharge
* Identify how to process Pre-Discharge BDD examination requests
 |
| Explain the following: | Each learning objective is covered in the associated topic. At the conclusion of the lesson, the learning objectives will be reviewed.  |
| Motivation | Pre-discharge BDD program is designed to improve our process of delivering benefits the day after discharge for active duty Servicemembers’ (SM) who participate. |
| STAR Error code(s) | N/A |
| References**Slide 3**  | Explain where these references are located in the workplace.All M21-1 references are found in the [Live Manual Website](https://vaww.compensation.pension.km.va.gov/).* [M21-1, Part III, Subpart i, 2.A, General Information on Pre-Discharge Claims](https://vaww.compensation.pension.km.va.gov/system/templates/selfservice/va_ka/)
* [M21-1, Part III, Subpart i, 2.B, Division of Responsibilities for Processing Benefits Delivery at Discharge (BDD) and BDD Excluded Claims](https://vaww.compensation.pension.km.va.gov/system/templates/selfservice/va_ka/)
* [M21-1, Part III, Subpart iv, 3.F, Examinations in Special Situations](https://vaww.vrm.km.va.gov/system/templates/selfservice/va_kanew/help/agent/locale/en-US/portal/554400000001034/content/554400000053562/M21-1%2C-Part-III%2C-Subpart-iv%2C-Chapter-3%2C-Section-F---Examinations-in-Special-Situations#4b)
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| Topic 1: Pre-Discharge Redesign  |
| Introduction | This topic will allow the trainee to understand guidance for pre-discharge in-service rating decisions |
| Time Required | 0.5 hours |
| OBJECTIVES/Teaching Points | Topic objectives:* Identify Pre-discharge Benefits Delivery at Discharge (BDD) and BDD excluded claims
* Recognize end products (EP) required to track claims received prior to discharge
* Identify how to process Pre-Discharge BDD examination requests

The following topic teaching points support the topic objectives: * Shift of when BDD ratings are completed
* Benefits of in-service ratings
* BDD v. BDD Excluded
* Jurisdiction
* National Work Queue (NWQ)
* In-service rating guidance
* Rating decision procedures
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| Pre-Discharge redesign*Slide 4* | Inform the audience that the pre-discharge claims have undergone a redesign which has adjusted the process for adjudicating claims that are received prior to a service members’ (SM) discharge from active duty.  |
| Termination of the Quick Start (QS) program**Slide 5** | On October 1, 2017, the Quick Start (QS) program was discontinued. As a result claims received within 180 days prior to discharge will be identified as Benefits Delivery at Discharge (BDD) claims and BDD excluded claims.

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| Days prior to separation claim is submitted | 90-180 days | 1-89 days |
| Claim identity | BDD | BDD excluded |

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| Pre-discharge claims received prior to October 1, 2017*Slide 6* | Inform the audience that although QS is terminated, the following claims received from a SM prior to October 1, 2017, must be processed according to historical BDD and QS procedures:* With 89 to 1 day remaining on active duty, or
* The SM is unavailable for examination

For prior BDD and QS procedures, please see Historical M21-1, III.i.2.A and B. |
| BDD qualifications*Slide 7* | Explain that in order to qualify for the BDD program, the SM must; * have a known date of discharge
* be 180 days to 90 days from discharge at the time of filing
* be available to report for examinations within the 10th day from the date the claim was received through the 45th day (*Example*: For a claim received on January 1, 2017, the service member must be available for examination from January 10, 2017 through February 15, 2017)
* Provide a copy of the service treatment records (STRs) for at least their current period of service
* Submit the claim on a prescribed form listed in M21-1, III.i.2.A.1.c

**Note:** The claim must **not** be excluded from VBMS processing. |
| Reasons that exclude a SM from the BDD program**Slide 8** | Advise the audience of the following reasons to exclude a SM from the BDD program:* Claims received from service members with 89 days to one day remaining on active duty
* Additional contentions that were added by the service member with less than 90 days remaining on active duty
* Claims where the service member did not provide a copy of STRs for the current period of service.
* Claims requiring a character of discharge (COD) determination.
* SM is unable to report for examinations as provided in M21-1, Part III, Subpart i.2.A.1.d, subject to exceptions in that block

**Note:** Please see M21-1, III.i.2.B.1.j for additional STR development requirements for SMs who meet all additional BDD program requirements. |
| Notification of BDD exclusion**Slide 9** | If a claim is excluded from the BDD program, the following actions must be taken:* Generate the BDD exclusion letter using the Letter Creator tool
* Select the appropriate reason for not meeting the BDD requirements, and
* Change the diary EP to the proper non-BDD EP and claim label.
* Update or add the EP claim type to “Quick Start”

This is the responsibility of whomever is processing the claim and identifies it as an BDD excluded claim. However, if a claim processor notices that the BDD exclusion letter has not been provided to the claimant, it is their responsibility to provide notification.  |
| Jurisdiction of excluded BDD claims*Slide 10* | The regional office of jurisdiction (ROJ) will be responsible for processing pre-discharge claims that are excluded from the BDD program. The SM can elect to have the claim processed under the Fully Developed Claim (FDC) program, the Decision Ready Claims (DRC) program, the standard VA claims process, or any other available program unless otherwise noted. |
| Example*Slide 11* | Servicemember submits a claim for compensation on February 12, 2018, at Joint Base Lewis-McChord, Washington. Her release from active duty date is July 30, 2018. The service member annotates she will be on permissive temporary duty (TDY) status in Charleston SC, effective February 26, 2018 – April 13, 2018. Is this claim BDD eligible, if not, why?* **No! This claim is BDD excluded as the service member is not available to report for examinations within the 10th through 45th day from the date the claim was received per** [**M21-1, Part III, Subpart i.2.A.1.d**](https://vaww.compensation.pension.km.va.gov/system/templates/selfservice/va_ka/)**.**
 |
| BDD claim label and EP*Slide 12* | Inform the audience that third digit modifiers for pre-discharge claims are terminated. Once all development actions are completed, the diary 336 EP for a BDD claim will be changed to the proper EP and claim label as shown in the table below:

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| --- | --- |
| **Claim Type** | **BDD EP – Claim Label** |
| Original  | * 110 – BDD-Initial, or
* 010 – BDD-Initial 8+ issues
 |
| * New SC
* Reopened, or
* Increased evaluation
 | 020 – BDD-Supplemental |

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| BDD Excluded claim label and EP*Slide 13* | When initially establishing a BDD excluded claim, the station of origination (SOO) must use EPs 010, 110, or 020 as appropriate to the claim type (original <8 issues, original 8+ issues, new, increase, reopen) and attach an appropriate claim label.Important: Excluded BDD claims must also be established as a diary EP in VBMS utilizing the “Pre-Discharge” radio button. The process is provided in M21-1, III.i.2.A.2.a.  |
| Excluded BDD claim w/ diary 337 EP*Slide 14* | Pre-Discharge claims received via eBenefits or submitted electronically by the SM’s VSO will automatically establish the EP and claim label *337 – Quick Start* for SMs with less than 90 days remaining on active duty. The EP 337 must be changed to the appropriate rating EP upon receipt for processing as BDD-excluded claims.  |
| Concurrent EPs*Slides 15-16* | Explain that additional contentions submitted by BDD claimants when there **are less than 90 days** remaining on active duty at the time the additional contentions are submitted will be separately processed as BDD excluded claims. These claims will be established as indicated by the table below:

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| --- | --- |
| **If the pending BDD EP is an…** | **Then establish…** |
| * 110 – BDD-Initial, or
* 010 – BDD-Initial 8+ issues
 | Establish an EP 020 with the appropriate claim label.  |
| 020 – BDD-Supplemental | Establish an EP 021 with the appropriate claim label. |

Make sure to clarify the following points:* It is important to note that BDD excluded claims must also be established as a diary EP.
* Additional contentions that are submitted by BDD claimants when there **are 90 or more days remaining on active duty at the time the claim for the additional contention is submitted will be associated with the pending BDD diary 336 EP or proper rating EP (110, 010, or 020).**  Concurrent rating EPs are only allowed if there are contentions that qualify for BDD program and contentions that are excluded from BDD program.
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| Clarification on BDD exams*Slide 17* | Remind the audience that to determine if a contract or Veterans Health Administration (VHA) examination is needed, you are required to utilize the Examination Request Routing Assistance (ERRA).NOTE: An Separation Health Assessment (SHA) examination should be requested for all BDD claimants still on active duty at the time of the examination request along with any necessary specialist examinations.as outlined in M21-III.iv.3.F.4. |
| Clarification on Follow-up of BDD Examinations*Slides 18-19* | Also, remind the audience that in order to ensure timely processing of BDD claims, MSCs or other BDD claims processors must ensure that requested exam clarifications are completed timely according to M21-1 III.iv.3.A.10.d. BDD claims processor must also ensure examinations are not rejected/cancelled. If the exam is rejected or cancelled, the MSC or other BDD claims processer must review and follow the direction provided in the table below:

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| --- | --- |
| **If the examination cancellation is due to…** | **Then…** |
| The SM’s failure to adhere to BDD requirements | * PIF change the pending EP to a non BDD rating EP,
* Enter a note in VBMS indicating the SM was removed from BDD program, and
* continue processing the claim as a BDD excluded claim
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| A reason outside of the control of SM | * Take the necessary steps to submit a new exam request, and
* Continue processing the claims as a BDD claim
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| Lesson Review, Assessment, and Wrap-up |
| IntroductionDiscuss the following: | The Pre-discharge redesign lesson is complete. Review each lesson objective and ask the trainees for any questions or comments. |
| Time Required | 0.25 hours  |
| Lesson Objectives | You have completed the Pre-Discharge Redesign lesson. The trainee should be able to: * Identify Pre-discharge Benefits Delivery at Discharge (BDD) and BDD excluded claims
* Recognize end products (EP) required to track claims received prior to discharge
* Identify how to process Pre-Discharge BDD examination requests
 |
| Assessment  | Remind the trainees to complete the on-line assessment in TMS to receive credit for completion of the course.The assessment will allow the participants to demonstrate their understanding of the information presented in this lesson. |