PRE-DISCHARGE BENEFITS DELIVERY AT DISCHARGE (BDD) DEVELOPMENT

Instructor Lesson Plan

Time Required: 1.5 Hours

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| Lesson Description |
| The information below provides the instructor with an overview of the lesson and the materials that are required to effectively present this instruction. |
| TMS # | 4396799 |
| Prerequisites | Prior to this lesson, the audience should complete the following lessons:* + - * Introduction to Pre-Discharge Claims
			* Benefits Delivery at Discharge (BDD) Claims Establishment
 |
| target audience | The target audience for Pre-Discharge Benefits Delivery at Discharge (BDD) Developmentis entry level Military Service Coordinator (MSC) or Pre-VSR claims processors.Although this lesson is targeted to teach the MSCs or other BDD claims processors, it may be taught to other VA personnel as mandatory or refresher type training. |
| Time Required | 1.5 hours |
| Materials/TRAINING AIDS | Lesson materials:* Pre-Discharge Benefits Delivery at Discharge (BDD) Development PowerPoint Presentation
* Pre-Discharge Benefits Delivery at Discharge (BDD) Development Trainee Handouts
 |
| 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.
 |
| 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 Benefits Delivery at Discharge (BDD) Development |
| 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 Lesson | This lesson is intended to inform the audience of how to develop Pre-discharge claims. This lesson will contain discussions and exercises that will provide the audience the tools to successfully develop BDD and BDD-Excluded claims.  |
| Lesson ObjectivesSlide 2Handout 2 | To accomplish the purpose of this lesson, the MSC or other Pre-discharge claims processor will be required to accomplish the following lesson objectives: * Identify a BDD claim and distinguish it from an excluded BDD claim
* Understand the development procedures for Pre-Discharge BDD claims
* Understand the process for determining a BDD claim is ready for a decision
 |
| Explain the following: | Each learning objective is covered in the associated topic. After the lesson, the learning objectives will be reviewed.  |
| Motivation | The VA mission is “to serve those who shall have borne the battle and to his/her widow(er) and orphan.” (President Abraham Lincoln). In order to satisfy this mission, VA wishes to provide claimants with decisions on their claims in a timely manner. One avenue of providing a timely resolution is through the Pre-Discharge Program. For the Pre-Discharge claim program to be successful, proper development is crucial.  |
| STAR Error code(s) | The Systematic Technical Accuracy Review (STAR) Program reviews cases and considers them either “accurate” or “in error” for the purpose of measuring technical accuracy.  Common errors will include whether * Establishment of claims in VBMS with an incorrect date of claim, EP, or claim label
* Pre-Decision Notice was provided and adequate
* Development was completed to obtain all evidence required prior to deciding the claim

. |
| ReferencesSlide 3 Handout 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, Chapter 2, Section A - General Information on Pre-Discharge Claims](https://vaww.vrm.km.va.gov/system/templates/selfservice/va_kanew/help/agent/locale/en-US/portal/554400000001034/content/554400000014099/M21-1-Part-III-Subpart-i-Chapter-2-Section-A-General-Information-on-Pre-Discharge-Claims)
* [M21-1, Part III, Subpart i, Chapter 2, Section B - Division of Responsibilities for Processing Benefits Delivery at Discharge (BDD) and BDD-Excluded Claims](https://vaww.vrm.km.va.gov/system/templates/selfservice/va_kanew/help/agent/locale/en-US/portal/554400000001034/content/554400000014101/M21-1-Part-III-Subpart-i-Chapter-2-Section-B-Division-of-Responsibilities-for-Processing-Benefits-Delivery-at-Discharge-BDD-and-BDD-Excluded-Claims)
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| Topic 1: Qualification for BDD Program |
| Introduction | This topic will refresh the trainee on what constitutes as a Pre-Discharge BDD claim. To avoid erroneous development, it is crucial that the MSC or other BDD claims processor verify the claim is eligible to be processed under the BDD program. |
| Time Required | 0.25 hours |
| OBJECTIVES/Teaching Points | Topic objectives:* Identify a BDD claim and distinguish it from an excluded BDD claim.

The following topic teaching points support the topic objectives: * Eligibility
* Prescribed form requirements
* BDD vs. BDD excluded
* Qualifying criteria under the BDD program
* Exclusions from the BDD Program
* Notification of BDD exclusion
* Responsibility for processing BDD excluded claims
 |
| Eligibility Slide 4Handout 4 | Any servicemember (SM) on active duty may file a pre-discharge claim. This includes: * Reservists serving on active duty in an Active Guard Reserve (AGR) role under [10 U.S.C.](https://www.law.cornell.edu/uscode/text/10)
* full-time National Guard members serving in an AGR role under [32 U.S.C.](https://www.law.cornell.edu/uscode/text/32), and
* SMs undergoing medical evaluation board (MEB) or physical evaluation board (PEB) proceedings who are not currently enrolled in the Integrated Disability Evaluation System (IDES) program.
 |
| Prescribed Form RequirementsSlide 5Handout 4 | To file a BDD claim, a SM must complete VA Form 21-526EZ*, Application for Disability Compensation and Related Compensation Benefits.* Explain that VA Forms 21-526 and 21-526c were discontinued effective May 1, 2019. Thus, any pre-discharge claims received on this date or later must be on VA Form 21-526EZ. ***Note***: the claim must **not** be excluded from Veterans Benefits Management System (VBMS) processing.  |
| BDD v. BDD Excluded*Slide 6**Handout 4* | Pre-Discharge claims received within 180 days prior to discharge will be identified as Benefits Delivery at Discharge (BDD) claims and excluded BDD 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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| Qualifying Criteria under the BDD ProgramSlides 7-8Handouts 4-5 | ***Important:*** Please note that any individual who does not meet the other BDD program requirements will also be identified as a BDD excluded claimant even if they file their claim within the 90-180 day prior to discharge timeframe. 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 between the 10th through the 45th day from the date the claim was received (***Example***: For a claim received on January 1, 2017 the SM must be available for examination from January 10, 2017 through February 15, 2017),
* provide a copy of the service treatment records (STRs) from their current period of service,
* submit the claim on a VA Form 21-526EZ, and
* the claim must **not** be excluded from VBMS processing.

***Exceptions***: * Additional contentions received with less than 90 days remaining on active duty will be processed as a BDD-excluded claim as indicated in M21-1, Part III, Subpart i, 2.A.
* SMs who file a BDD claim might not be able to complete certain types of examinations, such as sleep studies, before discharge. VA does ***not*** penalize these SMs (by removing them from the BDD program) under these rare circumstances.
* If the SM is unable to attend required examinations within the prescribed 45-day period due to a delay on VA’s part then:
* do not remove the claim from the BDD program, and
* do everything possible to attempt to have the examination performed ***prior*** to the SMs discharge, including requesting the appropriate examination at their current location ***prior*** to performing the actions in M21-1, Part III, Subpart i, 2. B
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| Exclusions from BDD Program*Slides 9-10**Handout 5* | Claims of the types, or with the attributes, listed below are excluded from the BDD program, even if SMs submit them prior to discharge: * claims received from SMs with less than 90 days remaining on active duty
* additional contentions that were added by the SM with less than 90 days remaining on active duty
* claims from SMs who are unable to report for examinations as provided in M21-1, Part III, Subpart i, 2.A., subject to the exceptions in that block
* claims where the SM did not provide a copy of STRs for the current period of service with less than 90 days remaining on active duty.
* claims requiring case management for a SM who is
* very seriously injured/ill (VSI)
* seriously injured/ill (SI), or
* a “special category person” (SPC), who has suffered loss of a body part
* claims involving a terminally ill SM
* claims requiring a VA examination that must be completed in a foreign country, ***except*** when the examination can be completed by VA offices in Landstuhl, Germany, or Yongsan, Korea
* claims involving a SM who is awaiting discharge, while hospitalized in a VA or military treatment facility
* claims from pregnant service women, or
* claims requiring a character of discharge (COD) determination.

**NOTE:** Claims that are not eligible or qualify for BDD will be considered claims excluded from BDD and will be processed by the Regional Office of Jurisdiction (ROJ).  |
| Processing Additional Contentions from BDD ClaimantsSlides 11-12Handout 6 | Additional contentions received subsequently from the initial BDD claim that meet the qualifications for the BDD program will be associated with the pending BDD diary 336 EP or proper rating EP (110, 010, or 020). Explain that, as noted in M21-1, Part III, Subpart i, 2.A.2.i, BDD claimants with less than 90 days remaining on active duty who submit claims for additional contentions will have those additional contentions processed under a separate EP as a BDD-excluded claim. 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. |

***Important:*** Concurrently pending BDD and BDD-excluded rating EPs **are** allowed and should not be combined unless as noted in M21-1, Part III, Subpart i, 2. B.3. d. |
| Notification of BDD Exclusion*Slide 13-14**Handout 6* | 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 EP to the proper non-BDD EP and claim label.
* Change the “Pre-Discharge Type” to “Quick Start”
* Add the “BDD Excluded” Special Issue to each BDD excluded contention

This is the responsibility of whomever is processing the claim and identifies it as an excluded BDD 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. If the SM is informed verbally in person of the reason why their claim is excluded from BDD and this verbal notification is documented in the VBMS notes, then a BDD exclusion letter does not need to be sent.  |
| Responsibility for processing BDD excluded claimsSlide 15Handout 6 | The ROJ is responsible for processing BDD-excluded claims through the standard claims process, the FDC program, or any other applicable claims process unless otherwise stated.  |

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| Topic 2: Pre-Discharge BDD Development |
| Introduction | This topic will teach the trainee proper development for Pre-Discharge BDD claims.  |
| Time Required | 0.5 hours |
| OBJECTIVES/Teaching Points | Topic objectives:* Understand the development procedures for Pre-Discharge BDD claims

The following topic teaching points support the topic objectives: * Importance of Development
* Initial actions
* Development Actions
* Examinations
* Contract Examination
* VHA Examinations
* Follow-up Requirements for examinations
 |
| Importance of Development*Slide 16**Handout 7* | To ensure a timely decision on the claim, any required development, (such as requests for records or a VA examination) should be initiated while the SM is still on active duty, when possible.  |
| Initial ActionsSlide 17Handouts 7-8 | Upon receipt of a BDD claim, the MSC or other BDD claim processor is responsible for following the initial action steps below:

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| Step | Action |
| 1 | Review the application to ensure it is complete. |
| 2 | Ensure the correct diary EP 336 – BDD and appropriate claim label is tracking the claim and the date of claim (DOC) is set as the first day following the anticipated date of release from active duty (RAD), regardless of the date VA received the claim.  |
| 3 | Ensure that VBMS includes the correct power of attorney (POA) and corporate flashes for the claim. |
| 4 | Ensure a *VA Form 21-686c, Declaration of Status of Dependents*,is of record if dependents are indicated on the application. |
| 5 | Obtain the SM’s service treatment records (STRs) (including *DD Form 2807-1,* *Report of Medical History*) for the current period of service.The following are acceptable formats for the STRs:* photocopies
* compact disk – read only memory (CD-ROM), and
* digital media files transferred by a secure method.

***Notes***: * If the SM provides original STRs, make a copy of the records and return the originals to the SM the same day.
* If the original records cannot be returned to the SM, then return them to the Department of Defense (DoD) military treatment facility, or at one of the addresses below.

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| **Branch of Service** | **Address to Return STRs** |
| Navy | Bureau of Medicine and Surgery7700 Arlington Blvd, Suite 5126Falls Church, VA 22042-5126 |
| Army | AMEDD Record Processing Center3370 Nacogdoches Road, Suite 116San Antonio, TX 78217 |
| Air Force | Air Force Record Processing Center3370 Nacogdoches Road, Suite 116San Antonio, TX 78217 |
| Coast Guard | Commanding OfficerHSWL Service CenterATTN: Central Cell300 E Main St, Suite 1000Norfolk, VA 23510-9109 |

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| Development ActionsSlide 18Handout 8 | After completing the initial steps, the MSC or other BDD claims processor must undertake any necessary development actions, such as* If any prior periods of service exist, these periods of service need to be verified and request the STRs for the earlier periods if not already of record. Further details on how to procure this evidence are provided in [M21-1, Part III, Subpart iii, 2.A and B](https://vaww.vrm.km.va.gov/system/templates/selfservice/va_kanew/help/agent/locale/en-US/portal/554400000001034/topic/554400000003086/Chapter-02-Developing-for-Service-Records).
* If private treatment records are indicated, follow the guidance provided in [M21-1 Part III, Subpart iii, 1.C.3, Requesting Evidence from Private Healthcare Providers](https://vaww.vrm.km.va.gov/system/templates/selfservice/va_kanew/help/agent/locale/en-US/portal/554400000001034/content/554400000036530/M21-1-Part-III-Subpart-iii-Chapter-1-Section-D-Requesting-Evidence-From-Private-Healthcare-Providers-PHPs)
* For categories of conditions that require specialized development and details on how to develop for supporting evidence, refer to [M21-1, Part IV, Subpart ii, Chapter 1, Development](https://vaww.vrm.km.va.gov/system/templates/selfservice/va_kanew/help/agent/locale/en-US/portal/554400000001034/topic/554400000003124/Chapter-01-Development).
* For BDD claims without STRs, refer to M21-1. Part III, Subpart i, 2.B.1.j.

***Important:*** The SMs current period of service cannot be verified until the day following discharge from active duty. As such, in-service rating decision action on the claim should **not** be delayed for verifying the current period of service. |
| Examinations*Slide 19**Handouts 8-9* | Once all evidence to support the claim and/or development is complete, the MSC or other BDD claims processor must determine if an exam is warranted. If an exam is warranted, determine whether a contract examination or VHA examination is required by utilizing the [Examination Request Routing Assistant (ERRA)](http://vbacoweb02.vba.va.gov/bl/21/DEMO/ZIP/default.asp) as noted below. Use the ERRA tool unless at the BDD intake site there is an existing agreement specifying the provider(s) responsible for local BDD examinations. Within the ERRA tool, select *Yes* following the text *BDD/IDES Claim?* as shown below:***Important***: * A 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.
* Be sure to review the *VA Form 21-526EZ* for effective dates of any forwarding addresses provided by the SM. This will ensure your request is routed to the SM’s current location. This is most critical if the exam request is a re-input of an original request that was rejected via EMS or CAPRI.
* When the examination request has been submitted, upload a copy of the examination request and ERRA results into the eFolder.

***References***: For more information on * mandatory use of ERRA and the exception, see M21-1, Part III, Subpart iv, 3.A.1.d
* examinations that ***cannot*** be requested through contract examiners see M21-1, Part III, Subpart iv, 3.A.1.j, and
* examinations that must be performed by a specialist see M21-1, Part III, Subpart iv, 3. A.1. h.
 |
| **Contract Examination***Slide 20**Handouts 9-10* | Enter requests for contract examinations using VBMS Exam Management System (EMS).***Important***: * Station selection should be the first entry made, and if you do not select the correct station number, you must delete the request and start over.
* The station number in EMS must correspond with the SM’s geographic jurisdiction. For example, use 318 from the station drop-down menu where the individual lives in North Carolina and the ERRA tool indicates QTC contract exam jurisdiction.
* The intake site location selected should be the intake site of the claims processor processing the claim.
* A request for an examination including the SHA DBQ and any other necessary specialist examinations ***must be entered within five calendar days*** of claim documents being uploaded into VBMS.

***References***: For more information on VBMS Exam Management System, see * TMS Courses
	+ VA 4415934 Introduction to Exam Management in VBMS
	+ VA 4415942 Creating Exam Scheduling Request in VBMS
	+ VA 4415941 Exam Scheduling Request Submission Status and Exam Activity
	+ VA 4415947 Request for Clarification/Modification Request/Rework Request in Exam Management
	+ VA 4415952 Exam Scheduling Request in VBMS for Individual Unemployability Claims
* [VBMS Core User Guide](https://vbaw.vba.va.gov/VBMS/docs/VBMSCoreUserGuide-Release_14_1.pdf) (Ch18)
* [Reviewing the Contentions List Screen in VBMS](https://vbaw.vba.va.gov/bl/21/contractexams/docs/Reviewing%20the%20Contentions%20List%20Screen%20in%20VBMS.pdf) Job Aid
* [Mandatory Contract Exam Staff Homepage](https://vbaw.vba.va.gov/bl/21/contractexams/exam_home.htm)
* [Regional Office Exam Liaisons](http://vbaw.vba.va.gov/bl/21/contractexams/docs/Exam%20Liaison%20Directory.xlsx),
 |
| VHA Examinations*Slide 20**Handout 10 - 11* | Enter requests for VHA examinations using CAPRI.***Important***:* A request for an examination including the SHA DBQ and any other necessary specialist examinations ***must be entered within five calendar days*** of claim documents being uploaded into VBMS.
* select the *BDD – DOD SHA* claim type in CAPRI.

***References***: For more information on* completing an CAPRI examination request, see M21-1, Part III, Subpart iv, 3.A.9.b
* steps to inputting examination requests, see M21-1, Part III, Subpart iv, 3.A.9.a
* instructions on uploading the examination request, see M21-1, Part III, Subpart iv, 3.A.9.a (step 10)
* the Exam Request Builder tool, see M21-1, Part III, Subpart iv, 3.A.2.e
* examinations (including language to be added to examination requests) in claims based on Southwest Asia Service, see M21-1, Part IV, Subpart ii, 1.E.2, and
* follow-up requirements for CAPRI examinations, see M21-1, Part III, Subpart i, 2.B.2.d.
 |
| Follow-up Requirements for Contract and CAPRI examinations*Slides 21-22**Handout 11* | In order to ensure timely processing of BDD claims, claims processors must ensure that requested examinations are not rejected/cancelled. If the examination is rejected or cancelled, the claims processor must review the rejection/cancellation reason and:* Request the claim from NWQ
* Review the ERRA tool to determine where the examination should be re-requested (Contractor (EMS) or VHA (CAPRI)), and
* Take the steps necessary to re-input the examination request, if necessary.

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| If the examination cancellation is due to ... | Then ... |
| the SM’s failure to adhere to BDD requirements (i.e. failure to report to exams without good cause) | * change the pending EP to a non BDD rating EP,
* enter a note in VBMS indicating why the SM was removed from the BDD Program, and
* continue processing the claim as a BDD excluded claim
 |
| a reason outside of the control of the SM | * take the necessary steps submit a new examination request, and
* continue processing the claim as a BDD claim
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***Notes:***Make every reasonable effort to contact the SM via telephone and/or email to verify why an examination was cancelled or rejected. |

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| Topic 3: Completion of Pre-Discharge BDD Claims |
| Introduction | This topic will provide details on the process of determining a BDD claim is ready for a decision. |
| Time Required | 0.25 hours |
| OBJECTIVES/Teaching Points | Topic objectives:* Understand the process for determining a BDD claim is ready for a decision

The following topic teaching points support the topic objectives: * Action(s) to take once development is complete
* BDD Claim Label and EP
 |
| Action(s) to take once development is completeSlide 23Handout 12 | Once all development actions are complete, the MSC or other BDD claims processor must* ensure all pending tracked items have the proper suspense dates
* update tracked items according to M21-1, Part III, Subpart iii, 1.D.3.c
* change the pending EP 336 to the proper rating EP, as noted in M21-1, Part III, Subpart i, 2.A.2.d., and
* ensure the claim is in open status unless the claim has already been determined to be RFD. (see M21-1 III.i.2.B.2.c for additional information).

***Notes***: * Following expiration of the 30-day suspense for examinations, NWQ must route the claim within 48 hours for additional action.
* Once the above actions have been completed, the National Work Queue (NWQ) will route the claim to the proper location for further processing during its overnight cycle.
* It is not necessary to wait for evidence to be uploaded into the VBMS eFolder prior to performing the above actions if:
* examinations do not require an eFolder review, and
* all development actions have been completed.
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| BDD Claim Label and EP*Slide 24**Handout 12* | 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 or
* Increased evaluation
 | 020 – BDD-Supplemental |

**NOTE:** Inform the audience that third digit modifiers for Pre-Discharge claims are terminated.  |
| National Work Queue*Slide 25**Handout 13-14* | Following the actions taken at the BDD intake site, the National Work Queue (NWQ) will route the BDD claim to regional offices nationally for review for ready for decision (RFD) status as soon as all examinations have been completed or all tracked items have expired. NOTE: This will occur while the SM is still on active duty, therefore deferral for service verification should not occur. Service verification for BDD claims does not occur until **after** the completion of the in-service rating decision and the **SM’s discharge from active duty**. |

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| Lesson Review, Assessment, and Wrap-up |
| IntroductionDiscuss the following: | The Pre-Discharge Claims Development lesson is complete. Review each lesson objective and ask the trainees for any questions or comments. |
| Time Required | 0.25 hours  |
| Lesson Objectives | The trainee should be able to: * Identify a BDD claim and distinguish it from an excluded BDD claim
* Understand the development procedures for Pre-Discharge BDD claims
* Understand process for determining a BDD claim is ready for a decision
 |
| Assessment  | Remind the trainees to complete the online 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. |