

Compensation Service (212)  
VBA/DoD Collaboration Team  
Monthly Integrated Disability Evaluation System (IDES)  
Conference Call Notes  
February 13, 2018—2 PM EST

The Compensation Service VBA/DoD Collaboration Team hosts this monthly conference call to announce updates and address issues and questions related to the Integrated Disability Evaluation System (IDES) Program. All IDES Military Services Coordinators (MSCs), Disability Rating Activity Sites (DRAS) personnel and other VA personnel supporting IDES are invited to participate.

The following call notes summarize, expand upon, and provide any needed clarification of the topics addressed on the call or on the corresponding read-ahead. This document is not a verbatim recitation of the call or read-ahead. If you have specific questions related to claims, please send them to the [DES Mailbox](#) (VAVBAWAS/CO/DES). A Compensation Service team member will contact you to gather the additional information needed to review and respond to your case. If a pattern is established, and we note several intake sites are having issues, a Compensation Service team member will discuss the topic on the following month's call.

TMS #4413877 has been created to provide training credit for the February 2018 IDES Teleconference. In order to receive the credit, you must sign into TMS and self-assign the course. The evaluation must be completed in order to receive credit for today's call.

Please sign-up for the [C&P Calendar Subscription Service](#) in order to receive notification that the read-ahead is available and for notification when the TMS number is active.

### Topics for Discussion

#### **Benefits Information/Benefits Estimate Letter to Servicemember (SM)**

MSCs should not be providing any benefits determined by the DRAS to the SM. This is the responsibility of the PEBLO/PEB. If needed, you can discuss this information with the SM after it is provided by the PEBLO/PEB.

**Question:** What should an MSC do if an IDES participant asks if their proposed rating is complete?

**CS:** The MSC can advise the participant of the *status* of the proposed rating, but should not discuss specific results. The MSC should explain that IDES policy stipulates that only DoD can release proposed ratings, as indicated in [M21-1 III.i.2.E.3.I](#), and encourage the participant to contact their PEBLO. The MSC can also explain that he or she will be available to discuss the proposed rating if the participant has any questions after the rating is provided by the PEBLO in accordance with [M21-1 III.i.2.E.5.e](#).



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## **Changes to IDES Goals**

VA and DoD are currently implementing a mandate from the Deputy Secretary of Defense (DSD) and Vice Chairman of the Joint Chiefs of Staff (VCJCS) to reduce processing time in IDES. The DSD and VCJCS mandated that the standard for processing time would be reduced from 295 days to 230 days. The new standard will be effective March 1, 2018, with a target to reach this standard by March 1, 2019.

As a result of the reduction in overall processing time, the goals in each stage of VA responsibility have been adjusted as follows:

<b>Stage</b>	<b>Active Duty</b>	<b>Non-Active Duty*</b>
Claims Development	5 days	10 days
Medical Evaluation	30 days	30 days
Proposed Rating	22 days	22 days
Rating Reconsideration	5 days	5 days
VA Benefits	20 days	N/A**

\*IDES goals are now based on the duty status of the participant, without regard to *component*.

\*\*In non-active duty cases, final rating action is taken during the proposed rating stage.

Please note that these new times reflect the *agency's* goals for each stage, and relate to the *average* processing time of all claims in the stage. As with previous timeliness goals, there is no expectation that the targets will be met in all claims.

VA and DoD are currently re-examining the IDES process in effort to identify process improvements that would help reach the new timeliness targets; however, at this time, no changes are being made to any IDES process, procedure, or requirement.

**UPDATE:** The new goals are currently under review and subject to change. Once the new goals are finalized, the Office of Field Operations (OFO) will notify the field and the changes will be discussed during the monthly IDES call.

## **MSC Responsibility for Adding Dependents**

To add dependents to their award, claimants must submit a [VA Form 21-686c](#) (or other appropriate prescribed form to add dependents, as described in M21-1 III.ii.2.B.1.b). VA Forms 27-0820 or 21-4138 cannot be used to add dependents. When a MSC receives a request to add dependents that is not on the prescribed form, they must attempt to obtain the prescribed form, per M21-1 III.iii.5.A.4.c.

MSCs should review the VA Form 21-686c to ensure completion, and take action to obtain any missing information. The 686c must be completed in its entirety, including:

- both the city and state for all births, marriages, and marriage terminations (divorce, death, etc.)
- full dates for birthdates and marital history



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- city and country for all foreign births and marriages (as required by M21-1 III.iii.5.B.2.a and M21-1 III.iii.5.F.3.a)

Further, all issues, including dependents, must be entered as a contention (see M21-1 III.iii.1.D.2.a). MSCs must create separate contentions under the EP 689 for each claimed dependent. For example, if the claimant submits a 686c for a spouse and child, the MSC should add contention as follows:

- *Dependency claim for [name of spouse],* and
- *Dependency claim for [name of child]*

MSCs should only update the claimant's corporate record if a dependency claim is received. If an MSC updates the corporate record—to include dependents, address changes, or direct deposit information—a corresponding note in VBMS should be added. The DRAS often sees parents or other relations added to the corporate record, but they are unable to locate corresponding forms or VBMS notes. If a dependent is added to the corporate record and the appropriate corresponding form is not of record, the DRAS must then contact the claimant to find out if they intended to claim that person as a dependent.

**Question:** How do MSCs add dependents to the corporate record via VBMS?

**CS:** Please refer to the [VBMS Core User Guide](#) for information on adding dependents via VBMS.

**Question:** Is the full date (month/day/year) required for prior marriages?

**CS:** No; [38 CFR 3.204\(a\)\(1\)](#) states the month and year are sufficient.

### **Brokering Claims**

MSCs are reminded that EP 689 must be brokered to the appropriate DRAS when all development is complete. Follow the steps below to broker a claim:

1. User role with permission to broker claim locates the claim in the work queue
2. Select the check box of the claim to broker
3. Click the **Action** menu (top right)
4. Select **Broker Claim** from the drop down
5. Click **Send to**, and select the receiving RO from the list
6. Enter a note in **Permanent Note**
7. Click **Submit**

The user will receive a green success banner and the claim will no longer show in the RO work queue. For more information, please refer to the [VBMS Core User Guide](#).

### **Use of VA Form 21-4138 and VA Form 21-526EZ**

VA Form 21-526EZ should be provided by IDES participants on the day of the initial interview, (or within five days of the interview if the participant elects not to, or is unable to, return the form during the interview). VA Form 21-4138 may be used to continue the 21-526EZ when additional



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space is needed to list claimed conditions; however, for conditions listed on the 21-4138 to be considered a VA claim, the 21-4138 must be submitted along with the 21-526EZ.

If the participant would like to claim any additional issues after the VA Form 21-526EZ was initially submitted, the participant must complete and submit a new VA Form 21-526EZ.

It has been indicated that in some instances, the 21-526EZ is included as part of the referral package provided by the PEBLO. This practice should be discouraged. MSCs should provide participants with 21-526EZ during (or in preparation for) the initial interview, and assist the participant with completing the form during the interview.

Further, it's also been indicated that in some cases after the PEBLO has provided the 21-526EZ, MSCs are using VA Form 21-4138 to capture claimed conditions during the initial interview at a later date---this is not acceptable. The 21-4138 itself is not a prescribed form, and therefore cannot be used to add conditions to an application that was previously received.

When handling a 21-4138 that was properly used as a continuation of 21-526EZ, the MSC should ensure both forms bare the same date-stamp. If for any reason the 21-4138 does not bare the same date stamp as 21-526, the MSC should include VBMS notes explaining the discrepancy.

Finally, MSCs should provide a 21-4138 as a continuation sheet only when there is insufficient space on the 21-526EZ. If the claimed conditions can neatly fit on the 21-526EZ, there is no need to use the 21-4138.

**Question:** Can an IDES participant submit a VA Form 21-526b to claim additional conditions after the initial interview (VA Form 21-526EZ is already of record and EP 689 is pending)?

**CS:** Yes, the 21-526b is acceptable; however, Section 5103 notice may need to be provided in accordance with [M21-1 I.1.B.1.m](#) if the previous notice did not include the information and evidence necessary to substantiate the current claim type. For this reason, MSCs should encourage use of 21-526EZ in these instances.

### **Five-Day Period to Return IDES Application**

IDES participants may elect to take up to five days from the initial interview to sign and return IDES applications. However, once the 21-526EZ is signed and returned, the participant can no longer add issues to the IDES claim/application. If the participant would like to claim additional issues, at any point after the 21-526EZ was returned to the MSC, the participant must submit a new application. New conditions cannot be added to a previously submitted 21-526EZ—even if those issues are raised within five days of the initial interview.

### **Date Stamps, Date of Claim, and Prepare Claim Start Date**

Documents must be date stamped to reflect the date they came into VA possession. The VA Form 21-0819 should be date stamped with the date it was provided by the PEBLO per M21-1 III.i.2.D.3.d (step 1). The date stamp on the 21-526EZ should reflect the date it was submitted by the claimant per III.i.2.D.4.a (step 10).



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The date of claim (DoC) of the EP should always match the date stamp on the 21-0819 (the date it was provided by the PEBLO), per M21-1 III.i.2.D.3.d (step 2).

The Prepare Claim Start (PCS) Date in VTA must reflect when the complete referral package was provided by the PEBLO per M21-1 III.i.2.D.3.c (step 6).

Generally, the PCS Date will match the date stamp on the 21-0819, and the DoC of the 689—except when the referral package is deemed incomplete. When a referral package is deemed incomplete, the date stamp on the 21-0819 and DoC should still reflect the date when the form was first provided by the PEBLO; however, in these instances, the PCS Date in VTA should be updated to reflect the date a *complete* referral was provided, per M21-1 III.i.2.D.3.c (steps 5 and 6).

**Question:** If the PEBLO sends a completed VA Form 21-0819 and complete referral package via SAFE after the MSC has closed for business (i.e. February 12, 2018 at 7pm), will the PCS Date be February 12, 2018 or February 13, 2018?

**CS:** In this example, the PCS Date should be February 12, 2018, unless there is a local agreement regarding the cut off time for document transfer. The PCS Date should be the day the PEBLO sends the case via SAFE. We encourage intake sites to negotiate agreement on a cut-off time for document exchange between PEBLO staff and MSC staff to ensure consistent and accurate VTA data.

### **January 12, 2018 M21-1 Changes**

Updates were published to M21-1 III.i.2.D on January 12, 2018. Please refer to the [Key Changes Document](#) (which is found at the bottom of the sections' webpage), and review the 2018 January Call notes for a summary of significant changes.

### **MSC Coaches/Supervisors**

MSCs Coaches/Supervisors are reminded to keep the [MSC SharePoint Site](#) updated with your RO's IDES information. Contact [andrew.reese@va.gov](mailto:andrew.reese@va.gov) for access. Also, if there is a change in the MSC Coach/Supervisor, the new Coach/Supervisor should inform 212D by emailing the [DES Mailbox](#).

### **Veterans Tracking Application (VTA) Reminders**

#### **VTA Training**

VTA Training is February 20 (9ET) and February 21 (1ET).

#### **Next Teleconference**

The next IDES Teleconference Call is scheduled for Tuesday, March 13, 2018, at 2PM EST. Please submit questions and proposed topics for discussion to the [DES Mailbox](#) no later than COB, Thursday, March 1, 2018

#### **Open Floor**



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