Compensation Service

Pre-Discharge & Interagency Collaboration Staff (212)

Monthly Integrated Disability Evaluation System (IDES)

and Benefits Delivery at Discharge (BDD) Conference Call Notes

September 11, 2018—2 PM ET

The Compensation Service Pre-Discharge & Interagency Collaboration Staff (212) hosts this monthly conference call to announce updates and address issues and questions related to the IDES and BDD Programs. All Military Services Coordinators (MSCs), Disability Rating Activity Sites (DRAS), Regional Offices and other VA personnel supporting IDES and BDD are invited to participate.

This read-ahead is provided to facilitate discussion during the conference call. Meeting Call Notes including questions asked during the call will be posted on the [IDES](https://vbaw.vba.va.gov/vbadod/IDES.asp) and [Pre-Discharge](https://vbaw.vba.va.gov/vbadod/predischarge.asp) intranet sites under **2018 Monthly Conference Call Schedule & Notes.** The call notes, PowerPoint presentation and Lync recording will also be available in TMS. The TMS number will be provided during the call.

TMS # VA 4481914 has been created to provide training credit for the September 2018 BDD/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](http://vbacodmoint1.vba.va.gov/bl/21/calendar/cal_Subscribe.asp) in order to receive notification that the read-ahead is available and for notification when the TMS number is active.

Call in numbers: 844-358-7954, 844-210-0201, 844-894-0415; Conference ID: 26520195

[Join online meeting](https://meet.RTC.VA.GOV/andrew.reese/84K5ZZFM)

<https://meet.RTC.VA.GOV/andrew.reese/84K5ZZFM>

**Topics for Discussion**

**Use of Current VA Form 21-526EZ (March 2018 Version)**

A [VA Form 21-526EZ](https://vbaw.vba.va.gov/bl/20/cio/20s5/forms/VBA-21-526EZ-ARE.pdf) (dated March 2018) has been published to the [VA Forms Website](http://vaww.va.gov/vaforms/Search_action.asp). A link to the updated 21-526EZ can also be found on [Compensation Service IDES Intranet Site](https://vbaw.vba.va.gov/vbadod/IDES.asp). Effective immediately, MSCs should provide only the current, March 2018 version of the VA Form 21-526EZ to IDES and BDD claimants.

If a claimant completed an application prior to meeting with the MSC and used an earlier version of the 21-526EZ, the claim would still be acceptable (per M21-1.III.ii.1.C.8.a), and should be processed according to standard procedure. However, MSCs should encourage use of the current 21-526EZ to the extent possible, and must now provide the current version to claimants.

**Automated Sharing of Completed DBQs for Pre-Discharge Claimants**

VBMS recently added automated functionality that forwards completed SHA DBQs to DoD for Pre-Discharge claimants whose examinations are requested through EMS. This functionality will also enter notes in VBMS to inform the user of a successful transfer of DBQs to DoD. Currently, the new functionality is still being tested for inconsistencies and duplications. As a result, users should continue to follow current guidance regarding submission of IDES/BDD examination results to DoD personnel. In BDD cases, contract SHA exam results must continue to be submitted to the MTF POCs as indicated in in [M21-1 III.i.2.B.4.c](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#4c). In IDES cases, MSCs must continue to provide examination results to the PEBLO. Once testing has been successfully completed, updated guidance will be provided.

**Examination Management System (EMS) Issues**

EMS continues to have issues with examination delays. Programmers and other personnel are working around the clock to correct the issues. If you are experiencing EMS issues, submit a help ticket to Your IT Services. You can access Your IT Services by clicking on the “Your IT” icon on your desktop, which will automatically open in the Chrome web browser. You can also contact the Contract Exam Inquiry Mailbox and include the specific issues and **claim numbers**.

**MSC Standards**

On July 1, 2018, VBA began operating under newly adopted national performance standards for Military Services Coordinators (MSC). We know there are many questions about these standards and how they will be implemented. Many of these questions have already been submitted to the Office of Field Operations (OFO) by the Districts and Regional Offices and answers have been provided. We encourage you to contact your local management with any questions that you have so that these questions can go through the proper channels and ensure consistent responses are provided.

**MSC Conference**

The second National Training Conference for Military Services Coordinators was held August 21-23 in Indianapolis. Thanks to all MSCs who participated and helped make the conference a success.

**BDD and IDES MSC Information on MSC SharePoint Site**

MSC Coaches/Supervisors are requested to keep their ROs BDD and IDES data updated on the [MSC SP Site.](https://vaww.infoshare.va.gov/sites/212Procedures/212D_MSC_Info/SitePages/Home.aspx)

There was some confusion with the original guidance that went out in July related to the BDD List. Please review and update your ROs data based on the following:

1. The BDD Coordinator is an RO position, not an installation position and **will be the same person** for all lines of data.
2. The BDD Coach can be different at each Military Installation if that person serves as the Coach, but if the BDD Coach is at the RO, this person should be the same for all lines of data.
3. Military Installation (Intake Site) is defined as a location where the MSC works and receives BDD claims or visits and accepts BDD claims (does not include one-time outreach events). For example, Gold Town Coast Guard Station: If you have an MSC that goes to this location on a regular basis to accept BDD claims, it goes on the list. If BDD claims from this location are mailed to an MSC or the RO, brought in person to the RO or submitted through eBenefits, it does not go on the list.
4. If your RO has Military Installation entries, all corresponding data entries should be populated (address, phone number, etc.).

For questions/assistance contact andew.reese@va.gov. Please have all your entries updated no later than close of business on October 1, 2018, and email andrew.reese@va.gov when verified or completed.

**TAP Briefings**

MSC Coaches/Supervisors are reminded that MSCs should not be participating in/speaking at TAP Briefings. Benefit Advisors will continue to provide TAP classes. The MSC is allowed to attend the TAP briefing. MSCs can coordinate with the Benefits Advisor to allow the advisor to introduce the MSC, provide a description of duties, hand out business cards, and give their location on the MTF or at the RO. MSCs are not allowed to conduct or provide additional information during the TAP briefing. If you have additional questions regarding TAP Briefings, the transitional liaisons are listed below.

Army: Raymond.Joe@va.gov

Navy: Michael.Caldwell3@va.gov

Air Force: Marilyn.Ragin@va.gov

Marine Corp: Joseph.Lattimer@va.gov

Coast Guard: Joseph.Lattimer@va.gov

**Searching for Cases with QMS Error Notifications**

With the implementation of the MSC Standards and associated Quality Reviews, QMS will send an email with the error notification, but QMS only provides the claim ID, not the SSN. Follow these steps in order to use the Claim ID to look up the claim in VBMS.

1. In VBMS, select “Search,” and then select “More Search Options” (located next to the Search field”).
2. Multiple options will appear, and the user should select “Claim.”
3. Two fields will appear. The Claim ID found in the QMS error notification can be entered in the lower field labeled “Claim ID.” This will open the file needed to review and correct the error.

**IDES Specific Topics**

**Handling IDES Cases in Which Participants Decline to File a VA Claim**

MSCs and DRAS Claims processors are reminded that IDES participants may decline to file a VA claim. In these instances, VA will evaluate the conditions referred by the service department for DoD purposes only, and no VA compensation will be awarded.

MSC procedures for handling IDES cases involving participants who decline to submit a VA Claim are found in M21-1 III.i.2.D.4.a. In these instances, the MSC must annotate Block 11 of the VA Form 21-0819 to indicate the participant’s decision. Further, the MSC must provide a 21-4138 and ask the participant to indicate their decision in writing. If the participant does not complete the 21-4138, the MSC must document the discussion on VA Form 27-0820.

DRAS Procedures for handling IDES cases in which a participant declines to submit a VA Claim are outlined in M21-1 III.i.2.F.10. When the participant’s decision to decline to submit a claim are properly documented (as indicated above), the DRAS should not contact the MSC to request that the MSC obtain a 21-526EZ. Rather, the DRAS should prepare a proposed rating that addressed the referred conditions for PEB-purposes only and prepare the notification letter specified in M21-1 III.i.2.F.10.b. The proposed rating and notification letter will be distributed (to the PEB, PEBLO, and participant) in the same manner as typical proposed rating and BEL. No final rating will be prepared.

***Important:*** The procedures above are applicable only when the participant *explicitly* declines to file a VA claim. A participant’s failure to return a VA Form 21-526EZ (or the absence of a 526EZ in the eFolder) cannot be presumed to be a participant’s decision to decline a VA claim. When the participant’s intention is not clear, further development/clarification is required.

**The Use of SAFE to Transfer Documents Between MSC and PEBLOs**

MSCs are reminded that SAFE should be used to transfer case information (STRs, forms, etc.) between the MSC and PEBLO. The use of SAFE stops the requirement to mail CDs and/or paper to a scanning vendor and allows the MSC to directly upload files to VBMS, which reduces the number of days to process the case. If an RO has a supported MTF that is not providing IDES case information through SAFE, send the following information to the IDES Mailbox NLT CoB October 1, 2018.

Email Subject Line: SAFE Information.

Regional Office

MTF

Delivery means

Reason not using SAFE

**VTA Reminders**

**VTA Notes**

Users are reminded about the importance of VTA notes. We are not requiring you to input a note in every case just because it is over goal, but we are requiring you to input a note when a case is over goal (see below) or has an issue/circumstance that a reviewer can’t understand/glean from the data fields. A quick note allows others to see what the issue is, rather than having to inquire.

Over goal note: If goal is a single digit, the note will be entered when case is five days over goal. If goal is double digits, the note will be entered when case is 10 days over goal.

**VTA v.2.4.0**

v.2.4.0 was released on August 26, 2018. See Folder 6 in the VTA Knowledge Center for details.

**VTA Training**

VTA Training is September 18, 2018 (9:00 AM EDT) and September 19, 2018 (1:00 PM EDT). Information is listed on the VTA Homepage under Calendar of Events.

**BDD Specific Topics**

**Pre-Discharge Claim Type**

VA and DoD are currently testing the automated functionality for STR delivery and completed DBQ transfer. A recent test showed notification of interest (NOI) (alerts sent to DoD when a Pre-Discharge claim is established in VBMS) label inconsistencies being sent to DoD. The NOI labels appear as *BDD*, *Quick Start*, and *Pre-Discharge Unknown*. These labels assist DoD with prioritizing the initial transfer of STRs. However, the *Pre-Discharge Unknown* label does not provide assistance as it does not identify a specific claim type.

During the claims establishment process, users have the ability to determine what the Pre-Discharge type is for the claim, and if that field is left blank it will be listed as Pre-Discharge Unknown. To prevent this from occurring, users are reminded of the requirement to select one of the options from the drop-down list in VBMS (*BDD*, *Quick Start* (for BDD Excluded claims), or *IDES*).

**BDD Checklist**

Throughout the MSC Conferences, we received multiple suggestions on how to improve the Pre-Discharge program for both the Servicemembers and the claims processors. Many of the suggestions are still being considered and may require extensive collaboration within VBA as well as with our DoD counterparts if implemented. However, the suggestion of having a BDD Checklist to assist users with accurate processing is currently underway. Once approved, the checklist will be displayed on our [Pre-Discharge Intranet site](https://vbaw.vba.va.gov/vbadod/predischarge.asp) for use by all Pre-Discharge claims processors.

Although, not all suggestions can be implemented as timely, we encourage you to continue sending suggestions to our Pre-Discharge mailbox.

**BDD Fact Sheet**

In August 2018, a new [BDD Factsheet](https://www.benefits.va.gov/BENEFITS/factsheets/general/BDDFactSheet.pdf) was posted to the [VBA Factsheets Intranet site](https://www.benefits.va.gov/BENEFITS/factsheets.asp) and the [Pre-Discharge Intranet site](https://vbaw.vba.va.gov/vbadod/predischarge.asp). The new [BDD Factsheet](https://www.benefits.va.gov/BENEFITS/factsheets/general/BDDFactSheet.pdf) provides the current program requirements, electronic STRs guidance, and information on alternative claim programs, for those that do not qualify for the BDD program; such as Decision Ready Claim (DRC), FDC, etc. Also, based on recommendations from the first MSC Conference, the [BDD Factsheet](https://www.benefits.va.gov/BENEFITS/factsheets/general/BDDFactSheet.pdf) was updated to provide a checklist for the Servicemember of all the necessary documents they need to provide to submit a BDD claim. Please be sure to replace any old or outdated BDD factsheets that you provide to the public with this [BDD Factsheet](https://www.benefits.va.gov/BENEFITS/factsheets/general/BDDFactSheet.pdf).

**Pre-Discharge Consolidated Action**

Pre-Discharge claim processors should no longer use the *Pre-Discharge Consolidated Action* special issue. This requirement was removed from the M21-1 III.i.2.B.2.c effective September 12, 2017 and will be removed from the M21-4 Appendix C.

**Current Program Timeliness**

As outreach specialists and VA’s frontline contact with SMs and Veterans, it is vital that we are realistic in our communications regarding claims processing times. Below is the current program timeliness data as of September 5, 2018.

|  |  |
| --- | --- |
| **September 5, 2018** | **BDD** |
| **Completed FYTD** | 33,253 |
| **Receipts FYTD** | 35,217 |
| **Pending** | 7,428 |
| **% Pending >125 Days** | 16.7% |
| **# Pending >125 Days** | 1,238 |
| **Average Days Pending** | 64.0 |
| **Avg. Days to Complete FYTD** | 65.7 |

**Source:** PA&I Daily Output Reports, 9/06/18

**From the Pre-Discharge BDD Mailbox**

**Question:** For military sexual trauma (MST) claims, do all ROs have a MST coordinator that must contact the Servicemember/Veteran when they submit a MST claim?

**Answer:** All ROs have a designated MST Outreach Coordinator, and the MST coordinator is required to contact the Servicemember/Veteran. Per [M21-1 IV.ii.1.D.5.f (Step 1)](https://vaww.vrm.km.va.gov/system/templates/selfservice/va_kanew/help/agent/locale/en-US/portal/554400000001034/content/554400000014906/M21-1-Part-IV-Subpart-ii-Chapter-1-Section-D-Claims-for-Service-Connection-SC-for-Post-Traumatic-Stress-Disorder-PTSD#5d), the RO’s MST Outreach Coordinator must contact the Servicemember/Veteran via telephone to ask if he/she completed DD Form 2910, DD Form 2911, or a similar form following the incident.

**Question:**  I have a Servicemember that was not available for their examinations for 45 days when they submitted their BDD excluded claim. However, this same Servicemember later became available for 45 days for their examinations and this Servicemember still has 90 to 180 days remaining on active duty. Is it possible for the BDD excluded claim to be changed to a BDD claim since the Servicemember now meets the requirements?

**Answer:** Yes, if the Servicemember is now available for 45 days for their examinations and has 90 to 180 days remaining on active duty, the EP can be P-changed to a BDD EP 336 with a *BDD* claim label and the remaining BDD development, including requesting examinations, should be completed prior to change the EP to a BDD rating EP. Please note, you must request the claim from NWQ before performing these actions if your RO is not currently the ROJ for the pending claim.

**Open Floor**

**If the SM does not make a claim, is a 526EZ required? My understanding was that the 526EZ had to be filled out with the referred condition on it.**

If the participant is not filing a VA claim, a 526 is not required. Complete a 21-4138. If the participant refuses to complete the 21-4138, document the discussion on a 27-0820.

**Will the QRT teams have access to the MSC VTA Notes for the MSC quality reviews that pull the cases from WATRS?**

QRT teams have/are applying for VTA, which will provide access to VTA, to include notes.

**Does the Referred Condition need to be listed on the 526EZ?**

Yes, listing the referred condition(s) on the VA Form 21-526EZ is recommended.

**Next Teleconference**

The next call is scheduled for Tuesday, October 9, 2018 at 2PM ET. Please submit IDES questions and proposed topics for discussion to the IDES Mailbox, and BDD questions and proposed topics for discussion to the Pre-Discharge BDD Mailbox no later than COB, Thursday, September 27, 2018.