

Monthly Benefits Delivery at Discharge (BDD) and
Integrated Disability Evaluation System (IDES) Conference Call Read Ahead
Compensation Service
BDD/IDES/Mil Pay Staff (212A)
January 8, 2019—2 PM ET

The Compensation Service BDD/IDES/Mil Pay Staff hosts this monthly conference call to announce updates and address issues and questions related to the BDD and IDES Programs. All Military Services Coordinators (MSCs), Disability Rating Activity Sites (DRAS), Regional Offices and other VA personnel supporting BDD and 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 [IDES Mailbox](#) and the [Pre-Discharge BDD Mailbox](#). 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 #4491065 has been created to provide training credit for the January 2019 BDD/IDES Teleconference. To receive the credit, you must sign into TMS and self-assign the course. The evaluation must be completed to receive credit for today's call.

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Topics for Discussion

Manage Evidence Screen

All evidence received must be added in the VBMS Manage Evidence screen. Any evidence that does not correspond to a pending tracked item must be accurately recorded with the proper receipt date using the Manage Evidence screen in VBMS, or the EVIDENCE tab in MAP-D in accordance with [M21-1, III.ii.1.B.2.h](#). For more information on updating solicited evidence, adding unsolicited evidence and updating unsolicited evidence, please refer to the [Manage Evidence](#) VBMS Job Instruction Sheet.

Do we need to update the Manage Evidence screen to indicate receipt of VA Form 21-0819, VA Form 21-526EZ, etc.?

Yes. Any evidence received that is not associated with a tracked item must be updated in accordance with [M21-1, III.ii.1.B.2.h](#). The evidence section of the rating decision must list all evidence considered in arriving at the decision. This section can be generated by importing the evidence listed in the Manage Evidence screen by Rating Veterans Service Representatives (RVSRs) when completing the rating decision, therefore, it is important to ensure all evidence is listed upon receipt.

IDES Specific Topics

Proper IDES Referral Packages

MSCs must review the IDES referral package within one day of the date it became available to determine whether the referral was proper and follow the guidance in [M21-1, III.i.2.D.3.d](#) when processing the referral package. A proper referral package includes a completed VA Form 21-0819 and all available service treatment records (STRs). If VA Form 21-0819 is not filled out in its entirety, then the referral package is improper and should be returned to the PEBLO. It is imperative that Section III - Statement of Complete and Current STR is completed, which indicates that all known STRs have been provided as part of the referral or specifies any exceptions to the provided STRs completeness, and indicates all PEBLO actions that were taken to obtain the record.

What should we do if we cannot obtain all records within 24 hours due to JLV issues?

There may be some latency issues when obtaining records from JLV. If you experience latency issues and are unable to review the records within 24 hours of receiving the referral package as a result, MSCs should include a note in VTA and VBMS indicating the delay. MSCs are encouraged to check JLV very early or very late in the day which may increase rates of success for downloading the records.

Note: MSCs will not be able to access records in JLV unless/until the Veteran has a record on the on the Master Veteran Index (MVI). If JLV returns an error message showing that a Veteran is not listed on the MVI, the MSC must create a record for the Veteran in CAPRI. The establishment of a CAPRI record will add the Veteran to the MVI and allow MSC access to the records in JLV.

For further information regarding the use of JLV to obtain STRs for IDES referrals, please refer to the document, [IDES Information Exchange between MSC and PEBLO](#) posted on the [IDES Homepage](#).

If VA Form 21-0819 becomes available on a Friday at 1630 and it's a three-day weekend, how does this impact the MSC's timeliness?



The claims development stage begins on the date the PEBLO provides or makes available the referral package as indicated by the Prepare Claim Start Date. In this example, the Prepare Claim Start Date should be Friday, unless there is a local agreement regarding the cut off time for document transfer. Intake sites are encouraged to negotiate agreement on a cut-off time for document exchange between PEBLO staff and MSC staff to ensure consistent and accurate VTA data.

IDES Special Issue

The IDES special issue was removed from M21-4, Appendix C on November 1, 2018 and subsequently deactivated in VBMS. MSCs are not required to add an IDES special issue to contentions for IDES claims in VBMS; however, MSCs are required to enter all applicable special issues in accordance with [M21-1, III.iii.1.F.2](#). The use of the IDES Deferral special issue is pending official guidance and will be for DRAS use only. Please note, the IDES Participant corporate flash must still be applied to all IDES claims in accordance with [M21-1, III.i.2.D.3.d](#) and remain on the corporate record ([M21-1, III.i.2.E.4.e](#)).

Tracked Items for Exam Requests

If a SHA, General Medical or Medical Opinion request is submitted to a contractor using EMS, then the MSC is not required to create a separate tracked item for each exam requested. Contract examination scheduling requests prepared in VBMS, once accepted by the scheduling activity, will automatically generate corresponding tracked items that initially reflect 30-day suspense dates, and automatically update based on scheduling, modification, cancellation, and/or completion of individual examination appointment(s). MSCs are responsible for ensuring all requested exams are completed prior to entering the *Medical Evaluation End Date* in VTA.

MSCs are reminded that for all examination requests submitted to VHA, MSCs must add a tracked item to VBMS under the pending EP 689 for each type of examination they request outside the VBMS examination management environment ([M21-1, III.i.2.D.6.j](#)).

I am not able to update the Medical Evaluation (ME) End Date in VTA for most of my cases. Why is the ME End Date field greyed out?

The SHA Returned Date and/or Other Exam Returned Date (if applicable) fields must be entered before the ME End Date can be entered, which is why the field is greyed out. When all examinations that were requested from the SHA provider have been returned and are deemed complete, the MSC must enter the SHA Exam Returned Date. If any exams were requested from a second provider, the MSC must enter the Other Exam Returned Date, when all exams requested from the other provider are returned and deemed complete. The MSC must enter the date all exams (requested from any/all providers) are returned and deemed complete as the Exam End Date and enter the date the exams were released to the PEBLO as the ME End Date. Please refer to Appendix A of the [September 2017](#) call notes for a summary of the exam fields on the MSC tab in VTA.

Inviting Claims for Disabilities found on Examinations

Per [M21-1, III.i.2.D.7.c](#), MSCs must complete a thorough review of examination reports before providing results to the PEBLO. During the course of this review, if the MSC identifies a new diagnosis that suggests potential entitlement to service connection for a chronic condition that was not specifically claimed or referred, the MSC must solicit the claim as indicated in [M21-1, IV.ii.2.A.1.e](#).



When a participant is on active duty, an initial diagnosis of a chronic condition on the VA examination report is generally sufficient to establish service connection; however, VA must receive a formal claim on a prescribed form to consider the issue.

To solicit a claim, MSCs should use the *Subsequent Development* letter in VBMS. MSCs must add the language specified by [M21-1, IV.ii.2.A.1.e](#) as free text under *Important Information*, and include the VA Form 21-526EZ as an enclosure.

DRAS personnel must handle unclaimed disabilities found on examinations in accordance with [M21-1, III.i.2.F.1.i](#).

VTA Training

VTA Training is Jan 15 (9ET) and 16 (1ET).

BDD Specific Topics

Claims Establishment Procedures for BDD-Excluded Claims

A recent review of Examination Management System (EMS) examination routing revealed BDD-excluded claims are not being routed properly due to incorrect claims establishment, which can cause significant delays with completing examinations. Claims excluded from the BDD program must be established in accordance with [M21-1, III.i.2.A.2.h](#) to ensure the examination request is routed correctly in EMS. When initially establishing a BDD-excluded claim, the claims assistant or claims processor must enter Quick Start in the Pre-Discharge Type field and add the BDD-Excluded special issue under one contention requiring an examination. If the claim is excluded from BDD processing after initial claims establishment, the claims processor must update the Pre-Discharge Type field from BDD to Quick Start and add the BDD-Excluded special issue. It is important that these actions are taken prior to submitting the examination request to ensure proper routing in EMS.

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 January 2, 2019.

January 2, 2019	BDD
Completed FYTD	9,946
Receipts FYTD	10,230
Pending	5,703
% Pending >125 Days	18.1%
# Pending >125 Days	1,032
Average Days Pending	78.0
Avg. Days to Complete FYTD	56.8

Source: PA&I Daily Output Reports, January 3, 2019



From the Pre-Discharge BDD Mailbox

Question: If a Servicemember submits an intent to file (ITF) 180-90 days prior to discharge, but does not submit their formal application and supporting documents until after the 90-day cut-off, can the ITF date be used to qualify them for the BDD program?

Answer: No, the Servicemember must meet all the requirements outlined in [M21-1, III.i.2.A.1.c.](#) and [M21-1, III.i.2.A.1.d.](#) within the prescribed timeframe to participate in the BDD program. The formal claim however can be accepted, but will be processed as a BDD Excluded claim.

Question: A Servicemember was excluded from the BDD program because VA Form 21-526EZ was submitted less than 90 days prior to discharge. The appropriate procedures for handling BDD-excluded claims were followed in accordance with [M21-1, III.i.2.B.3](#); however, once RAD+1 was reached it was determined that the Servicemember would remain on active duty for five months and all criteria for the BDD program was met. How should this claim be handled now?

Answer: The claims processor must enter a note in VBMS indicating the new discharge date and edit the claim detail in VBMS to the proper future suspense date (new RAD+1) in accordance with [M21-1, III.i.2.B.4.i.](#) If VBMS will not allow a change to the proper future suspense date to the current EP:

- change the pending EP to an EP 400
- cancel the EP 400
- establish a new BDD or BDD-excluded diary EP based on the new discharge date
- update any tracked items if necessary, and
- return the claim to the rating activity if an in-service rating decision was previously completed.

If the Servicemember now meets the criteria for BDD (due to RAD change), the claim should be updated to reflect the BDD claim type and claim label in accordance with [M21-1, III.i.2.A.2.d.](#)

Would a new VA Form 21-526EZ be needed in this situation?

No. The claim can be processed using the VA Form 21-526EZ submitted initially.

Would current STRs be needed since the period of service was extended in this situation?

No; however, if the Servicemember provides additional evidence (such as STRs), then the claim would have to be sent back to the rating activity in accordance with [M21-1, III.i.2.B.4.i.](#)

National Work Queue (NWQ) routed a claim, but the RAD has not expired, the suspense has not expired, and no new evidence has been received. There are no actions that need to be taken on the case at this time. Why are these cases being routed when there is no action to take?

One example was provided to the Pre-Discharge mailbox regarding this situation. The claim in question was in an active lifecycle, therefore, the claim was routed based on an expired suspense (open tracked item for proof of service). BDD claims awaiting separation should remain in the Rating Decision Complete status, which would prompt the claim to be recalled and held in the NWQ until the date of claim passes.



Would an RVSR be expected to complete an in-service rating if the RAD has passed, but no development actions were taken prior to discharge?

No, if RAD has passed then an in-service rating is not applicable. The RVSR would complete a final rating after all appropriate development actions have been completed.

A BDD claim is still pending after discharge and additional claims have been received prior to the BDD claim being finalized. Would these additional claims be processed with the BDD claim or would they be handled as subsequent claims?

If the claim was received within 90-180 days prior to RAD, it can be added to the original BDD claim; however, if the claim was received with less than 90 days prior to RAD (or after RAD) it should be processed under the Fully Developed Claim program, the Decision Ready Claim Initiative, or the standard VA claims process based on the Servicemember's election indicated on the application for benefits. For more information, see [M21-1, III.i.2.A.1.f](#)

Open Floor

Are you aware of and/or is someone working on the PDE/BDD excluded exam issue??

On February 5, 2019, the Office of Field Operations (OFO) and the Medical Disability Examination Program Office (MDEPO) provided a [job aid](#) to the field. This job aid addresses exam requests currently in draft status, as well as initial exam requests. This interim guidance should be followed until further notice. Manual references will not be updated since this guidance will only serve as temporary guidance. Questions concerning the job aid should be sent to [MDEPO Operations Staff](#).

I have a Servicemember who has been referred to IDES for a condition, but he has less than two years in service. Should I only process the referred condition or do I process all conditions claimed on the VA Form 21-526EZ?

All claimed conditions must be addressed if they are claimed as part of the IDES process. VA benefits can be awarded to Veterans who do not meet the minimum active duty service requirement indicated in [38 CFR 3.12a \(a\)\(1\)](#) when the person has a compensable service connected disability (the exception is specifically noted in [38 CFR 3.12a \(d\)\(3\)](#)). For additional information see [M21-1, III.ii.6.B.1.c](#), *Exceptions to the Minimum Active Duty Requirement*

Are the December 2018 call notes available?

A calendar blast was released on January 3, 2019 notifying the field that the [December 2018](#) BDD and IDES call notes and TMS #4490385 were available. Typically, the call notes from the previous month will be posted before the next BDD and IDES monthly call.

Next Teleconference

The next call is scheduled for Tuesday, February 12, 2019 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, January 31, 2019.

