Monthly Benefits Delivery at Discharge (BDD) and

Integrated Disability Evaluation System (IDES) Conference Call

Compensation Service

BDD/IDES/Mil Pay Staff (212A)

February 12, 2019—2 PM ET

**Conference Call Notes**

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.

Prior to the conference call, a read-ahead was provided to facilitate discussion during the call. To receive notification when the read-ahead becomes available for upcoming calls, please sign up for the [C&P Calendar Subscription Service](http://vbacodmoint1.vba.va.gov/bl/21/calendar/cal_Subscribe.asp).

The Conference Call Notes below include the information that was provided on the original read-ahead, as well as a summary of the discussion that took place during the call. These notes may also expand upon and/or clarify information that was discussed on the call or in the read-ahead; as such, all call attendees are encouraged to review the call notes, with attention to the information in the shaded blocks, which has added to the original read-ahead.

TMS #4492215 has been created to provide training credit for the February 2019 BDD/IDES Teleconference. To receive training credit, you must sign into TMS and self-assign the course.  The evaluation must be completed to receive credit.

Topics for Discussion

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

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

1. Click IDES MSC List and BDD MSC List
2. Find your data lines and highlight
3. Click Items above the VA Seal
4. Click Edit Item
5. Update and Save (If your RO has Military Installation entries, all corresponding data entries should be populated (address, phone number, etc.).

BDD specific info:

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.

Contact andrew.reese@va.gov if you have access or input issues.

Please have updates completed by March 1st, 2019, and send an email to [andrew.reese@va.gov](mailto:andrew.reese@va.gov) when completed.

STR and Examination Results Automatic Transfer

As we have moved from SAFE to the auto-transfer of STRs/exam results via VBMS/JLV/HAIMS, we continue to hear about transfer issues. If you have a site(s) with transfer issues or need assistance on procedures, email the location and details/case numbers to the [IDES Mailbox](mailto:VAVBAWAS/CO/IDES%20%3cIDES.VBACO@VA.GOV%3e) and [Pre-Discharge BDD Mailbox](mailto:VAVBAWAS/CO/PREDISCHARGE%20%3cPredischarge.VBACO@va.gov%3e).

**We have been told that MHS Genesis records are not part of the Electronic STR transfer. Do you have any information on MHS Genesis Records and the transfer of these records?**

MHS (Military Health System) GENESIS is the eventual replacement system to AHLTA. It has been tested at limited number of sites, and new sites are expected to be added later this calendar year.

Any STRs stored in MHS GENESIS must be provided with the IDES referral for the referral to be considered complete. The MHS GENESIS records will be included in the referral transfer from HAIMS, provided that the PEBLO has properly uploaded the MHS Genesis records into HAIMS, using the appropriate document type.

**Can we address why the PEBLO is not required to contact the MSC via email or phone or some other medium rather than counting them dropping records into HAIMS as the notification?**

At locations that are utilizing the HAIMS to VBMS transfer functionality, the PEBLOs’ entry of the Prepare Claim Start Date serves as notification to the MSC of the referral. Since no physical referral will be provided, MSCs must identify new referrals using the Pending CEST report, as indicated in the document, [IDES Information Exchange between MSC and PEBLO](https://vbaw.vba.va.gov/VBADOD/docs/IDES/InformationExchangebetweenMSCandPEBLOV3March2019.pdf).

**Adding a Servicemember to the Master Veteran Index (MVI)**

MSCs have reported receiving an error message in the Joint Legacy Viewer (JLV) stating access to the record is not supported because the Servicemember is not listed on the MVI. If a Servicemember is not listed on the MVI, then access to the record is not supported by JLV and the user will receive a VA User Restricted Access message. The VBA approved procedure to add the individual to the MVI is to add the participant as a new patient in CAPRI (it is not necessary to enter an exam request). Once the individual is added to CAPRI, their records will be accessible in JLV.

**Conditions Subject to Service Connection**

It is important for MSCs to identify any conditions that may be subject to service connection when reviewing a Servicemember’s service treatment records in preparation for the initial interview. Service connection may be granted for a particular injury or disease resulting in disability, which was incurred in service or aggravated by service. Abnormal laboratory findings, even if diagnosed, are not themselves disabilities for VA purposes. Per [M21-1, IV.ii.2.A.2.h](https://vaww.vrm.km.va.gov/system/templates/selfservice/va_kanew/help/agent/locale/en-US/portal/554400000001034/content/554400000014324/M21-1,-Part-IV,-Subpart-ii,-Chapter-2,-Section-A---Deciding-Claims-for-Disability-Compensation#1e), such findings include, but are not limited to:

* elevated blood sugar
* hyperlipidemia
* elevated triglycerides, or
* elevated cholesterol.

The MSC should notify the Servicemember when a condition he/she wishes to claim is not subject to service connection. When a Servicemember claims a condition that is not subject to service connection, the DRAS must deny service connection for the condition in the rating. Although the Servicemember is ultimately responsible for claiming conditions on VA Form 21-526EZ, the MSC should provide guidance to the Servicemember to assist with their claim.

IDES Specific Topics

**New Referred Conditions Added by DoD**

MSCs and DRAS must follow the proper procedures when a new referred condition is added by DoD. Importantly, when referred conditions are added after the Medical Evaluation Stage and require new exams, the case must be disenrolled in VTA and re-enrolled with a new VTA case ID. ([M21-1 III.i.2.F.1.h](https://vaww.vrm.km.va.gov/system/templates/selfservice/va_kanew/help/agent/locale/en-US/portal/554400000001034/content/554400000046277/M21-1,-Part-III,-Subpart-i,-Chapter-2,-Section-F---Special-Situations-Related-to-the-Integrated-Disability-Evaluation-System-(IDES))).

A complete list of M21-1 references related to added referred conditions are outlined below.

1. [M21-1 III.i.2.F.1.e.](https://vaww.vrm.km.va.gov/system/templates/selfservice/va_kanew/help/agent/locale/en-US/portal/554400000001034/content/554400000046277/M21-1,-Part-III,-Subpart-i,-Chapter-2,-Section-F---Special-Situations-Related-to-the-Integrated-Disability-Evaluation-System-(IDES)) Handling the Addition of Referred Conditions That Were Previously Claimed
2. [M21-1 III.i.2.F.1.f](https://vaww.vrm.km.va.gov/system/templates/selfservice/va_kanew/help/agent/locale/en-US/portal/554400000001034/content/554400000046277/M21-1,-Part-III,-Subpart-i,-Chapter-2,-Section-F---Special-Situations-Related-to-the-Integrated-Disability-Evaluation-System-(IDES)). Handling the Addition of Referred Conditions That Were Not Previously Claimed
3. [M21-1 III.i.2.F.1.g](https://vaww.vrm.km.va.gov/system/templates/selfservice/va_kanew/help/agent/locale/en-US/portal/554400000001034/content/554400000046277/M21-1,-Part-III,-Subpart-i,-Chapter-2,-Section-F---Special-Situations-Related-to-the-Integrated-Disability-Evaluation-System-(IDES)). Handling New Referred Conditions Added Before Completion of the Medical Evaluation Stage
4. [M-21-1 III.i.2.F.1.h](https://vaww.vrm.km.va.gov/system/templates/selfservice/va_kanew/help/agent/locale/en-US/portal/554400000001034/content/554400000046277/M21-1,-Part-III,-Subpart-i,-Chapter-2,-Section-F---Special-Situations-Related-to-the-Integrated-Disability-Evaluation-System-(IDES)). Handling New Referred Conditions Added After the Completion of the Medical Evaluation Stage
5. [M21-1 III.i.2.F.1.j](https://vaww.vrm.km.va.gov/system/templates/selfservice/va_kanew/help/agent/locale/en-US/portal/554400000001034/content/554400000046277/M21-1,-Part-III,-Subpart-i,-Chapter-2,-Section-F---Special-Situations-Related-to-the-Integrated-Disability-Evaluation-System-(IDES)). Handling IDES Cases Disenrolled Due to Additional Referred Conditions

Please review these sections and follow the appropriate procedure when the Service Department adds a new referred condition.

**Brokering IDES Claims**

MSCs are reminded of the requirement in [M21-1 III.i.2.D.7.d](https://vaww.vrm.km.va.gov/system/templates/selfservice/va_kanew/help/agent/locale/en-US/portal/554400000001034/content/554400000033257/M21-1-Part-III-Subpart-i-Chapter-2-Section-D-Overview-of-the-Integrated-Disability-Evaluation-System-IDES-and-Initial-Claims-Development?query=ides). (Actions MSCs Must Take Once All Examination Reports Are Deemed Complete) to broker the EP 689 to the DRAS once all development is complete. We have recently seen an increase of EP 689’s not being brokered timely which leads to delays in the case. Two ROs alone had over 300 cases that had not been brokered timely. To broker a claim, a VBMS user must have the **Intake Analyst** role.

Some MSCs reported not having the ability to broker cases themselves, but that they will coordinate with the supervisor (or another employee with this capability) to ensure that the cases are brokered to DRAS. This is also an acceptable practice, provided that MSC ensures the brokering action takes place in a timely manner.

**MSC Exam Results Review**

While it is the responsibility of the DRAS to determine whether examinations are sufficient for rating purposes, MSCs must ensure that examination reports are complete before providing results to the PEBLO or entering the Medical Evaluation End Date in VTA.

MSCs must ensure that all requested DBQs have been completed by the examiner. Further, MSCs should make efforts to confirm that specific testing required by the DBQs has been provided (such as range of motion, pulmonary function tests, radiography reports). Please note that it is acceptable for a DBQ to point towards existing testing or imaging that already exists in the medical record to avoid duplication of procedures; however, the existing information must be noted in the DBQ. Also, when reviewing exam results for completion, the MSC should double check their own examination request to ensure that it included all referred and claimed conditions.

In cases where the MSC identifies missing DBQs (or missing elements required by the DBQ), or the MSC failed to request examination of all claimed and referred conditions, the MSC must obtain the missing exam information before providing the exam results to the PEBLO. Further, when reviewing examination results the MSC must solicit a claim for any identified chronic, unclaimed condition potentially subject to Service connection (SC) (particularly in cases involving active duty service members) as discussed in [M21-1, IV.ii.2.A.1.e](https://vaww.vrm.km.va.gov/system/templates/selfservice/va_kanew/help/agent/locale/en-US/portal/554400000001034/content/554400000014324/M21-1,-Part-IV,-Subpart-ii,-Chapter-2,-Section-A---Deciding-Claims-for-Disability-Compensation#1e).

**When is someone going to hold the VHA providers accountable for addressing all claimed & referred conditions on the exams?**

The VA Exam Stage (as measured by VTA data), is an accounting of the exam provider’s performance. Examiners must address all issues noted on the examination request, before the VA Exam Stage can be closed out in VTA.

As part of the MSCs review of examination results (discussed above) MSCs must ensure that all conditions noted on the exam request have been addressed. The MSC should not update the VA Exam End Date in VTA, until they have confirmed that all issues have been addressed. As such, missed issues will impact reported directly impact the provider’s reported exam completion time.

**Are MSC’s supposed to deliver exams to the DoD Doctors, as well as the PEBLO?**

No; MSCs are required to provide examination results to the PEBLO. And at this time, PEBLOs should be obtaining the exam results from JLV/HAIMS. It is the PEBLO’s responsibility to make them available to MEB physicians.

**We are receiving communication from PEBLOs who see clarification issues in VTA and contact the MSC for status.**

If, after the results are provided, the DRAS subsequently determine that an exam is insufficient for rating purposes, the MSC assigned will be notified by email. The MSC is required to notify the PEBLO, and then

provide the PEBLO with the new/revised examination results when they become available (per M21-1 III.i.2.D.7.i). The VA Exam End and Medical Evaluation End Dates should not be updated in these instances.

**If exam results come back with additional exams for conditions that were not a part of the MEB claim or VA Claim, do we forward these results to the PEBLO for DOD doctors to review?**

Yes; all findings/results/DBQs associated with the IDES examination should be provided to the PEBLO.

VTA Reminders

MSC Pending Reports with Demonstration

With the new IDES goals/stage times, Coaches and MSCs are reminded of the importance of running Pending Reports, some at least twice a week.

1. The Pending Claims Development (CD) Report: The CD goal is 5 days for AD and 11 days for NAD. This report should be run twice, once by RO and once by MEB Location. Running the report by MEB Location will show cases that have a Prepare Claim Start Date, but may not have an MSC Assigned/RO. These cases need to be assigned to an MSC and/or the MEB MTF contacted about the referral.
2. The Pending Medical Evaluation Stage Report: We are seeing an uptick in cases that are not being updated with exam returned and end dates.

### VTA Training

VTA Training is February 19 (9ET) and 20 (1ET).

BDD Specific Topics

Brokering of BDD Excluded Claims

Recently we’ve received inquiries regarding BDD Excluded claims brokered to other ROs without development or claimant notification. Claim processors are reminded that the station of origination (SOO) is responsible for processing pre-separation claims that are excluded from the BDD program. Processing of these claims include establishing the appropriate end product and notifying the Servicemember of their exclusion from the BDD program and providing information about other processing options. Claims should not be brokered to other locations as NWQ will retrieve these claims and redistribute after discharge. ROs who direct users to request examinations for the BDD Excluded claims should continue to follow the guidance provided in [M21-1, III.i.2.B.3.f.](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#3h)

**EMS Exam Issues for BDD Excluded Claims**

Claims processors are currently unable to successfully submit an examination request in the VBMS Exam Management System for BDD Excluded Pre-Discharge claims using the Quick Start identifier.  The [job aid](https://vbaw.vba.va.gov/bl/21/contractexams/docs/Interim%20VBMS%20Exam%20Guidance%20for%20BDD%20Excluded%20Status.docx) provided by the Medical Disability Examination Program Office provides interim guidance on how to bypass errors and successfully submit an examination request for these types of claims. There are two scenarios, exams currently in “draft status” that cannot be submitted, and initial claims where an exam has not been established.  Exams in a draft status first need to be deleted.  Following the instructions on the attachment will provide for a successful exam request submission.  As a reminder, this guidance only serves as interim guidance until this error is corrected. If further issues remain, please contact the POCs listed below.

Any questions regarding this guidance should be directed to the OFO POCs [Dan Nguyen](mailto:dan.nguyen2@va.gov) and [Kelly Wante](mailto:kelly.wante@va.gov) and Compensation Service POCs [Jadine Piper](mailto:Jadine.Piper@va.gov) and [Brian Stephens](mailto:Brian.Stephens1@va.gov).  Questions regarding contract examination issues can always be sent to [VAVBAWAS/CO/Contract Examination Inquiries](mailto:contractexam.VBAVACO@VA.gov).

### 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 February 6, 2019.

|  |  |
| --- | --- |
| **February 6, 2019** | **BDD** |
| **Completed FYTD** | **13,421** |
| **Receipts FYTD** | **12,723** |
| **Pending** | **4,721** |
| **% Pending >125 Days** | **25.1%** |
| **# Pending >125 Days** | **1,186** |
| **Average Days Pending** | **81.5** |
| **Avg. Days to Complete FYTD** | **57.2** |

**Source:** PA&I Daily Output Reports, February 7, 2019

### From the Pre-Discharge BDD Mailbox

**Question:**

My outbased date stamp for BDD claims expired as of 2019. Can I use my IDES date stamp until I receive another BDD date stamp?

**Answer:** We recommend notifying your RO that a new date stamp meeting the requirements outlined in[M21-1, III.i.2.B.1.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)is needed. **Using the IDES date stamp is not recommended as it may cause confusion and lead to misidentification with processing. In the interim, the manual requires the following:**

If a date stamp meeting the requirements is not available, the claims processor may annotate the application with

* his/her initials
* his/her title
* the date of receipt, and
* the location where the claim was received.

***Important***:  Annotation of paper claims received at an out-based facility is intended to be used only as a temporary, emergency measure until the RO requests and receives a stamp meeting the requirements specified above.

Open Floor

EMS exam requests are not showing the Intake Site since the weekend VBMS update. QTC has previously had issues with missing intake info. Any info or workarounds?

The cause of this defect is still unknown at this time, and no workarounds has been identified.

MSCs should continue to enter the appropriate Intake Site at the time of CEST, as required by standard procedure, but no additional action is required at this time.

Until this defect is resolved, it may impact the data that is being collected by the vendors; however, this should not result in any delay on the claims or exam processes, and the issue is expected to have no impact on the IDES or BDD programs.

It appears that IDES claims involving previously denied issues may not be being process properly. Can you add this as a topic to a future call?

Yes. The topic will be addressed in detail, with consideration of the new AMA requirements, during the March 2019 Teleconference.

Is it possible to delay the auto notification regarding an IDES exit interview?  In many cases, the Service member has not even received orders when that notice is sent.

At this time, the exit interview must be completed when the PEBLO enters the Final Disposition Date in VTA. Compensation Service is now in the process of reviewing the exit interview procedures (in consideration of the Service Departments’ timeframe for out-processing activity) to determine if there is a more appropriate point to complete the exit interview. Until further notice, MSCs must continue to conduct exit interviews upon notification (from VTA auto-email) that the Final Disposition Date was entered.

When will the questions from the Second MSC Conference be posted?

The [questions from the Second MSC Training Conference](https://vbaw.vba.va.gov/VBADOD/docs/IDES/QandAfromMSCConferenceII.docx) are now posted to the IDES Homepage.

When the MSC establishes BDD excluded claims, are they required to add the secondary track item if they are not scheduling the exams?

Development for BDD Excluded claims are not required until after discharge. MSCs should continue to notify the Servicemember if they are excluded from the BDD program by providing a letter or through verbal communication (See M21-1, III.i.2.B.3.a.). If an MSC is directed by their supervisor to complete initial development to include requesting an examination for a BDD excluded claims and actions were taken; errors should be called accordingly.

What segmented lane do we put BDD excluded claims in?

Select *Core (National)*; See M21-1, III.ii.3.D.2.d.

Announcement: Kathleen Calvitti will be leaving the IDES/BDD/MilPay Staff this month.

Kat, who has worked in support of the IDES Program since 2014, announced that she will be moving into a new position with the Site Visit Staff at Compensation Service. The IDES staff at Compensation Service, along with several personnel from the field, all expressed appreciation for Kat’s significant contributions to the IDES program and wished her the best of luck in the future.

Next Teleconference

The next call is scheduled for Tuesday, March 12, 2019 at 2PM ET. Please submit IDES questions and proposed topics for discussion to the [IDES Mailbox](mailto:VAVBAWAS/CO/IDES%20%3cIDES.VBACO@VA.GOV%3e), and BDD questions and proposed topics for discussion to the [Pre-Discharge BDD Mailbox](mailto:VAVBAWAS/CO/PREDISCHARGE%20%3cPredischarge.VBACO@va.gov%3e) no later than COB, Thursday, February 28, 2019.