Monthly Benefits Delivery at Discharge (BDD) and

Integrated Disability Evaluation System (IDES) Conference Call

Compensation Service

BDD/IDES/Mil Pay Staff (212A)

March 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 provide any needed clarification of the topics addressed 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 # 4499119 has been created to provide training credit for the March 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 NLT COB April 1st, 2019, and send an email to [andrew.reese@va.gov](mailto:andrew.reese@va.gov) when completed.

**HAIMS Issue Impacting Document Transfer to VBMS**

A recent update to HAIMS has significantly slowed the conversion of *flat* PDF documents to *OCR* (Optical Character Recognition) PDF documents. Only OCR PDF documents will transfer from HAIMS to VBMS. As such, the document conversion issue, has significantly impacted the transfer of STRs in IDES and BDD cases, and in standard VA claims from post-discharge Veterans as well.

There is currently a HAIMS fix in development; however, a timeline for implementation has not been determined. As soon as the issue has been resolved, notification will be sent through appropriate channels.

Until this issue is resolved, IDES intake sites may use ARMDEC SAFE (or other approved means) to transfer IDES referrals. However, once this HAIMS issue is resolved, all MTFs (where PEBLOs have the capability to upload referral documents to HAIMS) **must** return to utilizing HAIMS functionality to transfer IDES referrals (as discussed further below).

All MTFs that have not yet converted to the HAIMS to VBMS process of IDES referral transfer should not delay or discontinue efforts to convert; the current document conversion problem in HAIMS is temporary and should soon be resolved.

**New Version of Exam Request Builder**

On Friday, February 15, 2019a new version of the Exam Request Builder (version 4.46) was published on the [Rating Job Aids page](http://vbaw.vba.va.gov/bl/21/rating/rat00.htm). This new version has the following changes.

* + New language related to Sharp v. Shulkin, 29 Vet.App. 26 (2017) was added for several musculoskeletal DBQs
  + A bug that was causing FSAD language to generate for all female DBQ General Medical Compensation and DBQ Separation Health Assessment exam requests was corrected.

Please be sure to always launch the Exam Request Builder from the [Rating Job Aids page](https://vbaw.vba.va.gov/bl/21/rating/rat00.htm) to insure you have the current version.

**Joint Legacy Viewer (JLV) Helpdesk**

MSCs who are having difficulty downloading referral documents from JLV are encouraged to notify the [IDES Mailbox](mailto:VAVBAWAS/CO/IDES%20%3cIDES.VBACO@VA.GOV%3e) and the JLV helpdesk at [JLVTeam@va.gov](mailto:JLVTeam@va.gov)

The PIES help desk may be able to assist you since they have direct HAIMS access

**III.iii.2.B.3.f.  How STRs From HAIMS Are Grouped and Displayed in VBMS**

If VBMS users experience difficulty accessing or viewing electronic copies of STRs that HAIMS provides, they should send e-mail notification to [VAVBAWAS/CO/PIES](mailto:VAVBAWAS/CO/PIES).

**IDES Servicemember Satisfaction Survey Report (July 2018 to December 2018)**

Each quarter, the Office of Warrior Care Policy (WCP) reports on the results of telephonic and online satisfaction surveys administered to Servicemembers who are going through the IDES process. Data for each report spans the preceding six-month period. For this report, data was collected between July 2018 and December 2018 from a population of 24,453 IDES Servicemembers who were invited to participate in the survey after completing the MEB or PEB phase. During the six-month period, 93% of survey respondents expressed satisfaction with the IDES process. This rate continues to exceed the DoD and VA goal of 80%. Active and Reserve component Servicemember overall satisfaction rates were 94 % and 90% respectively.

* **Satisfaction with VA MSCs**

The report summarized Servicemember feedback on their satisfaction with the MEB and PEB Phases of the IDES process. In the MEB Phase, Servicemembers indicated 89% satisfaction with MSC customer service. MSCs are commended for their dedicated service. Thank you for your exceptional service to our wounded, ill and injured Servicemembers!

* **Exit Interview Completion**

The survey showed that 70% of PEB respondents received an exit interview. However, nearly one-third (30%) of PEB respondents did not have an exit interview with their VA MSC, and the report included a recommendation that all participants be given the opportunity to meet with their MSC before their date of separation.

MSCs are reminded of the importance of exit interviews and that an exit interview is required in all IDES cases, regardless of whether the participant is returned to duty or found unfit for duty. The exit interview must be completed within 10 business days of the Exit Interview Start Date in VTA or notification that the participant was returned to duty, as indicated in [M21-1 III.i.2.E.5.a](https://vaww.vrm.km.va.gov/system/templates/selfservice/va_kanew/help/agent/locale/en-US/portal/554400000001034/content/554400000046269/M21-1-Part-III-Subpart-i-Chapter-2-Section-E-Department-of-Veterans-Affairs-VA-Responsibilities-Based-on-Medical-Evaluation-Board-MEB-and-Physical-Evaluation-Board-PEB-Outcomes).

Another recommendation WCP provided was to determine how participants can be clearly and thoroughly informed on their opportunity for appeals, and benefits they may be eligible to receive upon exiting IDES. MSCs are reminded the purpose of an exit interview at the end of the PEB phase is to gather any additional information required to expedite payment of VA benefits after separation, explain the appeal process, and describe the Servicemember’s appeal rights before the VA decision is finalized. For more information on exit interview, refer to [M21-1 III.i.2.E.5](https://vaww.vrm.km.va.gov/system/templates/selfservice/va_kanew/help/agent/locale/en-US/portal/554400000001034/content/554400000046269/M21-1-Part-III-Subpart-i-Chapter-2-Section-E-Department-of-Veterans-Affairs-VA-Responsibilities-Based-on-Medical-Evaluation-Board-MEB-and-Physical-Evaluation-Board-PEB-Outcomes#5).

The complete IDES Survey is posted on the [IDES Homepage](https://vbaw.vba.va.gov/vbadod/IDES.asp).

IDES Specific Topics

## AMA Implications in IDES

Compensation Service has developed procedural guidance for handling IDES claims involving potential AMA issues. The document, AMA Implications in IDES, is now posted to the [IDES Homepage](https://vbaw.vba.va.gov/vbadod/IDES.asp) and provides instruction for MSCs (Section I) and DRAS personnel (Section II). A summary of the information is provided below; however, all IDES personnel are encouraged to review the document in full.

* IDES claims received prior to February 19, 2019, will be handled in accordance with standard IDES procedure (However, all decisions prepared after this date must conform to AMA notifications requirements).

For all claims received after February 19, 2019:

* Previously denied issues indicated on a VA Form 21-526EZ or VA Form 21-0819 must be handled as a request for application.
* Any appeal or supplemental claim-related application must be forwarded to the scanning vendor so that it can be placed under control and processed by appropriate non-IDES personnel.
* Generally, IDES MSCs and DRAS personnel will take to action on pending supplemental claim/appeal related issue or EP. However, if the issue is related to a referred condition, MSCs must request current examinations, and DRAS must provide evaluations for PEB-purposes only.

#### Update: the Read Ahead that was distributed before the call indicated that that previously “*and finally”* denied issues indicated on a 21-0819 or 21-526EZ must be handled as a request for application. However, this guidance is applicable for any and all previous denials (regardless of the date of the previous decision; this fact is now reflected in the information above and in the AMA Implications in IDES Document on the IDES Homepage.

#### If the previous denial is a referred issue, should the MSC order an examination?

When the service department refers a condition that was previously denied, MSCs will need to order exams for the condition.

## What Letter should be sent in response to a request for Application?

## Version 6.2 of the Letter Creator Added a letter template titled “Request for Application AMA Review”. This letter will display when IPC is selected as the area.

## IDES Examination Results Transfer to PEBLO

All IDES examinations are now transferred directly to JLV (if completed by VHA) or HAIMS (if completed by a contract provider). PEBLOs must access examinations reports from those systems. The document [IDES Information Exchange between MSC and PEBLO](https://vbaw.vba.va.gov/VBADOD/docs/IDES/InformationExchangebetweenMSCandPEBLOV3March2019.pdf), which is posted to the [IDES Homepage](https://vbaw.vba.va.gov/vbadod/IDES.asp) has been updated to reflect this change, and [M21-1 III.i.2.D.7.e](https://vaww.vrm.km.va.gov/system/templates/selfservice/va_kanew/help/agent/locale/en-US/portal/554400000001034/topic/554400000003071/Chapter-02-Pre-Discharge-Claims) will soon be updated to reflect this change as well.

MSCs must immediately discontinue the practice of providing examination results to PEBLOs (except when examination results did not successfully transfer to HAIMS/JLV). If at any location, PEBLOs report not having the appropriate access needed to obtain examinations results from HAIMS and JLV, MSCs should contact the [IDES Mailbox](mailto:VAVBAWAS/CO/IDES%20%3cIDES.VBACO@VA.GOV%3e).

**Transferring IDES Referrals via HAIMS to VBMS Functionality**

Transferring IDES referrals using HAIMS to VBMS functionality is the preferred method of transfer, and must be utilized at any location in which the PEBLO has the capability to upload records into HAIMS. Military Treatment Facilities that have not started uploading IDES referrals to HAIMS have been directed to continue efforts towards this end.

MSC Instructions for this HAIMS to VBMS transfer process are detailed in the document,  [IDES Information Exchange between MSC and PEBLO](https://vbaw.vba.va.gov/VBADOD/docs/IDES/InformationExchangebetweenMSCandPEBLOV3March2019.pdf), which is posted to the [IDES Homepage](https://vbaw.vba.va.gov/vbadod/IDES.asp).

For this transfer to be successful, the proper procedures must be followed accurately. It is critical that the following steps occur:

1. The PEBLO must upload the STRs into HAIMS, in the exact manner, and using the appropriate document types, as specified by current DoD guidance. This action must occur *before* entering the Prepare Claim Start Date in VTA
2. After the Prepare Claim Start Date is entered in VTA, the MSC must establish the EP 689 in VBMS.

When these steps are taken properly, the referral documents should be in the eFolder. If the HAIMS transfer fails, or has not completed by the time the MSC is requesting examinations, the IDES referral documents should be downloaded from JLV.

**Have the MTFs been notified to stop sending referrals via HAIMS?. Apparently, Ft Hood is continuing to submit via HAIMS?**

WCP informed us HAIMS is not working. The Army and AF (AF requires Encryption Wizard also) informed us they are using SAFE to transfer case info.

**How long is it supposed to take before the STR's from HAIMS are in VBMS?**

The projected time is with-in 24 hours.

**Use of ARMDEC SAFE in IDES**

SAFE has been found to be an acceptable means to transfer PII, including PHI.

Military Treatment Facilities (MTFs) that have converted to using HAIMS for transferring the IDES referrals to VA should continue to do so. MTFs that are still working towards the implementation of HAIMS referral transfer, may use SAFE (or other approved alternative means) to transfer IDES referrals in the interim.

MSCs may use SAFE to transfer examinations results to PEBLOs--but only in the limited instances in which the examinations results did not successfully transfer to HAIMS or JLV.

DRAS may resume using SAFE to transfer documents to and from the PEBs.

**Servicemembers Who Decline to File VA Claims During IDES Initial Interview**

MSCs are required to update the *Servicemember Filing VA Claim* in VTA to indicate the participant’s intention to submit a VA claim as part of the IDES process. This field (which previously defaulted to Yes), was recently updated in VTA to show a blank response as the default. A selection of *Yes* or *No* in this field is now required to save any information entered on the MSC screen.

***Important:*** It is critical that MSCs enter this information accurately--the data entered in this field will determine whether the case is shown on DRAS pending final rating reports.

MSC must only select *No* for this field when the participant specifically declines to file a VA claim and this is appropriately documented as required by M21-1 III.i.2.D.4.a.(step 5)  In all other circumstances, MSCs must update this field to indicate *Yes*. MSCs must not indicate No in this field simply because the participant fails to sign or return a VA Form 21-526.

When a participant explicitly declines to file a VA claim in IDES, DRAS must complete the actions required by M21-1 III.i.2.F.10.a. and b. at the time of the proposed rating. In these cases, DRAS must address the referred conditions for PEB purposes, clear the EP 689 and take no further action on the IDES claim. DRAS will **not** prepare a final VA rating and will not enter a VA Benefits Date in VTA.

**Handling VA Claims Submitted by an IDES Participant Who Initially Declined to File**

If the application is received before DRAS completes the proposed rating:

* The conditions must be handled in accordance with M21-1 III.i.2.F.1.b. and M21-1 III.i.2.D.4.h.
* The contentions listed on the application must be entered in VBMS under the pending EP 689, but will generally be developed and resolved outside of the IDES process.
* **Important:** the MSC must change the *Servicemember Filing VA Claim* field on the MSC tab to reflect *Yes.*
* DRAS will address these conditions in IDES ratings in accordance with M21-1 III.i.2.F.d.
* If any of the new conditions cannot be resolved in IDES final rating, they must be deferred and the rating EP continued in accordance with III.i.2.E.4.d (to be resolved outside of IDES).

If the application is received after DRAS completes the IDES proposed rating:

* The new application must be processed outside of IDES, according to standard VBA procedures (or BDD/BDD excluded procedures, if the claim is received before the Servicemember is discharged).
* The claim must be placed under EP control, using the appropriate non-IDES EP and claim label. This claim will not be addressed by IDES personnel and will not be tracked in VTA.
* ***Important***: The *Servicemember Filing VA Claim* field on the MSC tab in VTA will continue to reflect No, and must **not** be updated.

**Ensuring Accuracy of** **Servicemember Filing VA Claim Data in VTA**

When completing proposed rating activity, DRAS must consider the indication in the Servicemember Filing VA Claim, along with all evidence in the record. When there is a question or concern about the accuracy of the data in this field, the DRAS should contact the MSC assigned for clarification /confirmation or when applicable, correction. Any questions or concerns that cannot be resolved by the MSC should be directed to the [IDES Mailbox](mailto:VAVBAWAS/CO/IDES%20%3cIDES.VBACO@VA.GOV%3e).

**Updated IDES Development Checklist (Feb 2019)**

The [IDES Development Checklist](https://vbaw.vba.va.gov/VBADOD/docs/IDES/IDESDevelopmentChecklist.pdf), which is now available on the [IDES Homepage](https://vbaw.vba.va.gov/vbadod/IDES.asp) has been updated to reflect recent program changes.

MSCs are reminded that use of the checklist is required per [M21-1 III.i.2.D.3.a.](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) Effective immediately, MSCs should use the current version (dated February 2019).

VTA Reminders

**New Claims Establishment Date Field and Pending CEST Report in VTA**

A new field, *Claims Establishment (CEST) Date has* been added to VTA. MSCs must update this field to reflect the date the EP 689 was established in VBMS.

This field serves to populate the new VTA *Pending CEST Report,* (which is now available from the VTA Homepage under IDES>MSC Pending Reports). The Pending CEST report shows all cases that have a *Prepare Claim Start Date* but no *Claims Establishment Date* in VTA. The *Pending CEST* report was designed to support the use of HAIMS to VBMS referral transfer discussed above. As indicated in the document [IDES Information Exchange between MSC and PEBLO](https://vbaw.vba.va.gov/VBADOD/docs/IDES/InformationExchangebetweenMSCandPEBLOV3March2019.pdf), MSCs will use this report to identify referrals that were made by the PEBLO, and now need EP 689s established in VBMS to initiate transfer of the referral documents from HAIMS.

**Note:** MSCs are not required to enter CEST dates in VTA for cases that were established prior to the date of this announcement. However, any cases with a Prepare Claim Start Date after March 1, 2019 will appear on the Pending CEST report unless/until the *CEST Date* is entered in VTA.

*CEST Date* data is also now included on the Weekly Data Extract and is available in User-Defined Reports.

### VTA Training

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

BDD Specific Topics

BDD Applications Indicating Previously and Finally Denied Issues

Previously and finally denied issues indicated on a VA Form 21-526 series application must be handled as a request for application, as indicated in Section I.a of the AMA Implications in IDES document.

Identifying Intake Site during Claim Establishment

Claim processors are reminded to select the intake site/RO when establishing BDD/BDD Excluded claims in VBMS. This action not only assist with monitoring the volume of claim receipts by location, it also assists the contract exam staff with tracking exam requests by location. If left blank, an “unknown” location will appear on these reports which can lead to inaccurate reporting. If your intake site is not listed in VBMS, please send an email to the Pre-Discharge mailbox.

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 March 7, 2019.

|  |  |
| --- | --- |
| **March 7, 2019** | **BDD** |
| **Completed FYTD** | **15,565** |
| **Receipts FYTD** | **13,531** |
| **Pending** | **4,652** |
| **# Completed w/in 30 Days of Discharge** | **7,942** |
| **% Completed w/in 30 Days of Discharge** | **51%** |
| **Average Days Pending** | **95.6** |
| **Avg. Days to Complete FYTD** | **57.8** |

**Source:** Tableau BDD History Report, March 8, 2019

### From the Pre-Discharge BDD Mailbox

**Question:** Do exams need to be ordered in the 180-90 day window for the claim to be considered a BDD claim?  Or is it still be considered BDD as long as the Servicemember is available to attend exams 10-45 days after the date of submission per the manual?

**Answer:** Qualifying for claim processing under the BDD program is not contingent upon when the examination is requested by the claim processor. If the servicemember meets the eligibility requirements in [M21-1 III.i.2.A.1.d](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#1d)**.** and is available to attend exams 10-45 days after the date of submission, the claim should be processed as a BDD claim.

Open Floor

How is quality to know if MSCs conduct "formal" Exit Interviews?

All IDES AQRS’ should have access to VTA in order to check the Exit Interview Date and Exit Interview Outcome on the MSC Tab.

When using the newest version of VA FORM 21-526EZ, are MSC's still required to write CEST information along the margin of the form?

Yes, the annotation should still be made in cases when the 21-526 provided in paper.

Exception: If the application was completed/submitted electronically, it is not necessary to make the annotations listed above. However, the MSC must ensure that when the application is uploaded it is associated with the EP 689 in VBMS per M21-1, Part III, Subpart i, 2.D.3.m.

The M21 says we are supposed to thoroughly go through the STR's to advise SM's what is claimable if the STR's are not available that delays the case.

M21-1 III.i.2.D.3.d, Step 14 instructs MSCs to prepare for the initial meeting with the IDES participant by reviewing the contents of his/her referral package and claims folder. However, this same reference also stipulates that an MSC may *not* delay meeting with an IDES participant solely because the MSC is waiting on to receive STRs that were requested from a VA facility.

Next Teleconference

The next call is scheduled for Tuesday, April 9, 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, March 28, 2019.