**RATING DECISIONS FOR THE INTEGRATED DISABILITY EVALUATION SYSTEM (IDES)**

**INSTRUCTOR LESSON PLAN**

**TIME REQUIRED: 1.25 HOURS**

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| **LESSON DESCRIPTION**  |
| The information below provides the instructor with an overview of the lesson and the materials that are required to effectively present this instruction.  |
| **TMS #**  | 4500902  |
| **PREREQUISITES**  | Prior to this lesson, the Military Service Coordinator (MSC) must have completed the VSR VIP Pre-D Course. |
| **TARGET AUDIENCE**  | The target audience forRating Decisions for the Integrated Disability Evaluation System (IDES) isthe Military Service Coordinator (MSC). Although this lesson is targeted to teach theMilitary Service Coordinator (MSC), it may be taught to other VA personnel assigned to IDES Rating Activity Sites as mandatory or refresher type training.  |
| **TIME** **REQUIRED**  | 1.25 hours  |
| **MATERIALS/** **TRAINING AIDS**  | Lesson materials: * Rating Decisions for the Integrated Disability Evaluation System (IDES) PowerPoint Presentation
* Rating Decision for the Integrated Disability Evaluation System (IDES) Lesson Plan
* Rating Decision for the Integrated Disability Evaluation System (IDES) Hand Out
* Rating Decisions for the Integrated Disability Evaluation System (IDES) Practical exercise
* Rating Decisions for the Integrated Disability Evaluation System

(IDES) Practical exercise Answer Key * Rating Example Long Form Rating – Job Aid
* Benefits Eligibility Letter (BEL) Example – Job Aid
 |
| **TRAINING** **AREA/TOOLS**  | The following are required to ensure the trainees are able to meet the lesson objectives: * Classroom or private area suitable for participatory discussions
* Seating, writing materials, and writing surfaces for trainee note taking and participation
* Handouts, which include a practical exercise Large writing surface (easel pad, chalkboard, dry erase board, overhead projector, etc.) with appropriate writing materials
* Computer with PowerPoint software to present the lesson material Trainees require access to the following tools:
* VA TMS to complete the assessment
* Rating long form sample - Job Aid
* Benefits Eligibility Letter (BEL)sample – Job Aid
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| **PRE-PLANNING**  | □  | Become familiar with all training materials by reading the Instructor Lesson Plan while simultaneously reviewing the corresponding PowerPoint slides. This will provide you the opportunity to see the connection between the Lesson Plan and the slides, which will allow for a more structured presentation during the training session.  |
|  | □  | Become familiar with the content of the trainee handouts and their association to the Lesson Plan.  |
|  | □  | Practice is the best guarantee of providing a quality presentation. At a minimum, do a complete walkthrough of the presentation to practice coordination between this Lesson Plan, the trainee handouts, and the PowerPoint slides and ensure your timing is on track with the length of the lesson.  |
|  | □  | Ensure that there are copies of all handouts before the training session.  |
|  | □  | When required, reserve the training room.  |
|  | □  | Arrange for equipment such as flip charts, an overhead projector, and any other equipment (as needed).  |
|  | □  | Talk to people in your office who are most familiar with this topic to collect experiences that you can include as examples in the lesson.  |
|  | □  | This lesson plan belongs to you. Feel free to highlight headings, key phrases, or other information to help the instruction flow smoothly. Feel free to add any notes or information that you need in the margins.  |
| **TRAINING DAY**  | □  | Arrive as early as possible to ensure access to the facility and computers.  |
|  | □  | Become familiar with the location of restrooms and other facilities that the trainees will require.  |
|  | □  | Test the computer and projector to ensure they are working properly.  |
|  | □ □ □  | Before class begins, open the PowerPoint presentation to the first slide. This will help to ensure the presentation is functioning properly. Make sure that a whiteboard or flip chart and the associated markers are available.The instructor completes a roll call attendance sheet or provides a sign-in sheet to the students. The attendance records are forwarded to the Regional Office Training Managers.   |

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| **INTRODUCTION TO RATING DECISIONS FOR THE INTEGRATED DISABILITY EVALUATION SYSTEM (IDES)** |
| **INSTRUCTOR INTRODUCTION**  | Complete the following: * Introduce yourself
* Orient learners to the facilities
* Ensure that all learners have the required handouts
 |
| **TIME** **REQUIRED**  | 0.10 hours  |
| **PURPOSE OF LESSON** *Explain the following:* | This lesson is intended to provide the Military Service Coordinator (MSC) with information of the components of a rating decision and the associated issues involved with rating decisions. The MSC will be able to recall the information provided in this lesson to explain a rating decision to the Veteran or Service member when it is presented to them by the PEBLO. And/or create a Benefits Estimate Letter (BEL) when appropriate. This lesson will contain discussions and exercises that will allow the trainee to describe and identify the:* Components of a Rating Decision
* Rating Issues
* Benefits Estimate Letter (BEL)
 |
| **MOTIVATION** *Slide 2* *Handout 2*  | One of the MSC’s responsibilities is to explain the proposed raring decision to the Veteran or Service member enrolled in the IDES system. The MSC’s comprehensive understanding of the elements of a rating decision allows the MSC to effectively explain the proposed and final rating decision(s) to the Veteran or Service member enrolled in the IDES system.  *Instructor note:* The MSC is not responsible for verifying the accuracy of a proposed rating decision.   |

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| **LESSON** **OBJECTIVES** *Discuss the following:* *Slide 3* *Handout 3*  | In order to accomplish the purpose of this lesson, the MSC will be required to complete an assessment that covers the following lesson objectives. TheMSCwill: * Recognize evidence a Rating Veteran Service Representative (RVSR) needs to consider in the rating decision.
* Explain which Veterans Administration System is used to create a rating.
* Identify the components of a proposed and final rating decision
* Explain the difference between an IDES proposed rating versus the final rating and
* Describe the components of a BEL and when it is required.
 |
| *Explain the following:*  | Each learning objective is covered in the associated topic. Knowledge checks are included in the power point after each topic. At the conclusion of the lesson, the learning objectives will be reviewed. The audience will complete the practical exercise per instructors direction. When time has elapsed and/or when all trainees have completed the practical exercise the instructor will review answers and open a discussion if indicated. As you review this lesson, place the power point in presentation mode, this mode will display the interactive items created within the Knowledge checks in the presentation.  |
| **STAR ERROR CODE(S)**  | The Systematic Technical Accuracy Review (STAR) Program reviews cases and considers them either “accurate” or “in error” for the purpose of measuring technical accuracy.  |
| **REFERENCES** *Slide 4*  *Handout 4*  | Explain where these references are located in the workplace. * [38 C.F.R 3.306 Aggravation of preservice disability](https://www.ecfr.gov/cgi-bin/retrieveECFR?gp=&SID=64bfb7cbf268cc998993324171693b6c&mc=true&n=pt38.1.3&r=PART&ty=HTML) • [38 C.F.R 3.350 - Special monthly compensation ratings.](https://www.ecfr.gov/cgi-bin/retrieveECFR?gp=&SID=64bfb7cbf268cc998993324171693b6c&mc=true&n=pt38.1.3&r=PART&ty=HTML)
* [38 C.F.R Part 4 - Schedule for rating disabilities](https://www.ecfr.gov/cgi-bin/retrieveECFR?gp=&SID=64bfb7cbf268cc998993324171693b6c&mc=true&r=PART&n=pt38.1.4)
* [M21-1, Part III,i,2,D - Overview of the Integrated Disability Evaluation System (IDES) and Initial Claims Development](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)
* [M21-1, Part III,i,2,F - Special Situations Related to the Integrated Disability Evaluation System (IDES)](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?query=IDES)
* [M21-1, Part III.i,2,C - Ancillary Benefits and Other Issues Involving Pre-Discharge Claims](https://vaww.vrm.km.va.gov/system/templates/selfservice/va_kanew/help/agent/locale/en-US/portal/554400000001034/content/554400000014102/M21-1-Part-III-Subpart-i-Chapter-2-Section-C-Ancillary-Benefits-and-Other-Issues-Involving-Pre-Discharge-Claims)
* [M21-1, Part III,i,2,E - Department of Veterans Affairs (VA) Responsibilities Based on Medical Evaluation Board (MEB) and](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)

[Physical Evaluation Board (PEB) Outcomes](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) * [M21-1, Part III, i,2,E.3 Proposed Ratings](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)
* [M21-1 Part III. iv - General Rating Process](https://vaww.vrm.km.va.gov/system/templates/selfservice/va_kanew/help/agent/locale/en-US/portal/554400000001034/topic/554400000003092/Subpart-iv-General-Rating-Process)
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| **TOPIC 1: RATING DECISION PREPARATION**  |
| **INTRODUCTION**  | This topic provides general information on what the Rating Veteran Service Representative (RVSR) is required to consider in preparing the rating.  |
| **TIME REQUIRED**  | 0.25 hours  |
| **OBJECTIVES/** **TEACHING POINTS**   | Topic objectives: * Recognize information the RVSR considers in preparing the rating.
* Identify what Veteran Benefits Administration’s (VBA’s) system the RVSR uses to create a rating.

The following topic teaching points support the topic objectives: * What information is considered in creating the rating.
* What system is used to generate the rating.
 |
| **Rating Decision** **Preparation** *Slide 6-7* *Handout 5*  | A Rating Veterans Service Representative (RVSR) assigned to the Disability Rating Activity Site (DRAS) prepares the rating decision. The RVSR must consider the following when preparing the rating decision: * Provisions of all pertinent laws and regulations
* 1945 Schedule for Rating Disabilities
* Policy statements
* Procedures
* Administrators’ and Secretaries’ decisions
* Court of Appeals for Veterans Claims (CAVC) precedent opinions
* Other legal precedents governing the Department of Veterans Affairs (VA)

After considering the above items, the RVSR uses VBMS-R to produce an IDES rating decision.  |
| **Knowledge Check** *Slide 8-9*  | 1. Who at the DRAS prepares the rating decision? 1. The IDES VSR
2. **The RVSR**

C. Not prepared at the DRAS 1. RVSR’s need to consider laws, rules and VA guidance in their rating decisions. Name 3 items RVSR’s need to consider in their rating decision.

 * + **Provisions of all pertinent laws and regulations**
	+ **1945 Schedule for Rating Disabilities**
	+ **Policy statements**
	+ **Procedures**
	+ **Administrators and Secretaries decisions**
	+ **Court of Appeals for Veterans Claims (CAVC) precedent opinions**
	+ **Other legal precedents governing the**

**Department of Veterans Affairs (VA)** 1. The RVSR uses what VBA system to create the IDES rating.

 **VBMS-R**  |
| **TOPIC 2: COMPONENTS OF A RATING DECISION**  |
| **INTRODUCTION**  | In this topic the MSC will identify the components of a rating decision, explain the difference between a proposed rating and the final rating. Recognize and explain the difference between the differences of a short form or long form format in the rating narrative.  |
| **TIME REQUIRED**  | 0.25 hours  |
| **OBJECTIVES/** **TEACHING POINTS**   | Topic objectives: * Identify the components of a rating decision
* Explain the difference between a proposed rating and the final rating
* Recognize and explain the difference between a short form and long form narrative

The following topic teaching points support the topic objectives: * Components of a rating decision which includes; rating narrative, code sheet,
* IDES proposed rating and final decision
* Short and long form narrative.
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| **Components of a** **Rating Decision** *Slide 11* *Handout 6*  | A rating decision consists of two sections, the: * Rating Narrative
* Code Sheet

There are two types of IDES rating decisions: * Proposed ratings
* Final ratings
 |
| **Rating Narrative** *Slide 12* *Handout 6*  | The first major part of a rating decision is the Rating Narrative, which includes the following subparts: * Introduction
* Decision
* Evidence
* Reasons for Decision
* References
 |
| **Proposed Rating** **Decision Introduction** *Slide 13-14* *Handout 6-7*  | On a **proposed** rating decision, the Introduction section: * Includes the Service member’s name and branch of service
* Informs the Service member that the rating decision is produced in order to help DoD determine a final disposition for unfit conditions
* Instructs the Service member that the proposed rating decision determines potential entitlement to VA disability compensation
* Explains to the Service member that the rating decision would be null and void for VA benefits purposes if they are later shown to lack the necessary character of discharge
* Notes that if the Service member is found fit for duty, the rating decision would be null and void for VA benefits purposes.

**Note:** If the Service member is found fit for duty, a final rating decision will not be made. The Service member would have to submit another claim. \*For more information about how to handle cases involving an IDES participant who is found to meet retention standards, is fit for duty, or has been disenrolled from IDES, please refer to M21-1 III.i.2.E.2.a    |

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|  |  Review Proposed rating introduction sample.  |
| **Final Rating Decision** **Introduction** *Slide 15* *Handout 7-8*  | On a **final** rating decision, the Introduction section will include the: * Veteran’s periods of service
* Veteran’s dates of service
* Date the claim was received
* Type of claim that was received
 |
| **Decision and Decision** **Example** *Slide 16-17* *Handout 8-9*  | In the Decision section, all issues are considered, and the outcomes are discussed in a logical manner that addresses awards before denials, and any ancillary benefits considered and addressed.   Discuss Decision example  |
| **Overview of the** **Evidence Section** *Slide 18* *Handout 9-11*  | The Evidence section is a listing of all evidence considered in arriving at the decision, which may include but is not limited to * Service treatment records (STRs)
* Service personnel records
* Private and VA treatment records
* VA or contract examination reports, to include Disability Benefits Questionnaires (DBQs)
* Lay statements, and/or
* Written or oral testimony, to include court related transcripts.

Slides 19 through 21 describe the type of evidence and how the evidence should be listed in the rating.  |
| **Evidence Section** *Slide 19-21* *Handout 11*  | The Evidence section contains a list of all the evidence considered in arriving at the decision. Review list on PPT Slides 19 through 21 explain what type of evidence the RVSR used for his/her decision and how that information is addressed in the rating to include date of receipt, service periods and periods of medical care. Please note that the format of the dates change according to the evidence. Slide 21 provides an example of the Evidence section in a rating. Review Table if the evidence section identifies and how each should be listed in this section. |

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| **Narrative** *Slide 22* *Handout 11*  | Explain that there are two types of narrative that are possible “Short” and “Long”. This is dictated by the type of contention being addressed. We will see examples later in presentation.  |
| **Reasons for Decision** **Grant** *Slide 23-24* *Handout 12*  | The Reasons for Decision section contains a summary of pertinent facts and an explanation of their relevance to the rating decision. Grant explanations include the legal basis (e.g. direct, secondary), the effective date, an explanation for the effective date\*, the evaluation, and the next higher evaluation. Unless the effective date is the date of claim or the day after discharge **Note:** DRAS is required to propose an evaluation for all unfitting (PEB referred) conditions even if VA will not be granting service connection of the condition for disability compensation purposes  Slide 24 shows sample Short Form Award. Take this opportunity to show the job aid of a long form example. |
| **Reason for Decision on a Confirm and Continue (C&C)** **rating** *Slide 25* *Handout 13*  | The RVSR may confirm and continue an existing rating decision, in this case the reason for the C&C would include the basis for the current evaluation, requirements for the next higher evaluation if applicable any evidence of an absence of sustained improvement and any future exam potential.  If the IDES participant is in the Reserves or National Guard, the reason and decision section may include confirmed and continued(C&C) rating decisions   |
| **Reasons for Decision** **Rating Denial** *Slide 26-28* *Handout 13-14*  | Denials include the theory of service connection being addressed, the condition, and the reason(s) for denial, providing a succinct explanation of the elements lacking for a grant. Review the table on how RVSRS address denials The reasons for decision section should also include the following for each issue decided:  |

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|  | * citation of any favorable findings related to the issue being considered if denied,
* citation of all applicable regulations for the decision rendered,
* in the presence of positive and negative evidence, an assignment and explanation of the probative value of the evidence, and
* Favorable findings if any

**Note:** all IDES decisions MUST be in “Long Form”. Slide 21 shows example of traditional short form denial. Slide 22 shows Example IDES Long Form Denial **Talking Point:** Note that prior to the February 14, 2019, change in rating following the Appeals Modernization Act, favorable findings and regulatory citations were not required to be included in the rating decision narrative. Ratings from before this date will likely not include favorable findings or citations.  |
| **References** *Slide 29* *Handout 15*  | The References section is automatically generated by VBMS-R to note which laws and regulations govern entitlement to veteran benefits.  The default text included in the References section is: *Title 38 of the Code of Federal Regulations, Pensions, Bonuses and* *Veterans' Relief contains the regulations of the Department of Veterans Affairs which govern entitlement to all veteran benefits. For additional information regarding applicable laws and regulations, please consult your local library, or visit us at our web site, www.va.gov.*  |
| **Knowledge Check** *Slide 30-31*  | 1. What are the two (2) sections of a rating decision?

**Rating Narrative and Code Sheet** 1. Detail the parts of a Rating Narrative.

**Introduction, Decision, Evidence, Reasons for Decision & Evidence**. 1. What are the two distinct forms of Narratives?

**Short form and Long form.** 1. What type of IDES rating decisions would a DRAS RVSR prepare?

**Proposed and Final Ratings**  |

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| **TOPIC 3: THE CODE SHEET**  |
| **INTRODUCTION**  | This section of the presentation discusses the second part of the rating decision, the code sheet. The code sheet contains the Veteran’s identifying information, details the Veteran’s related percentage of service connection (SC) and or percentage of Non-service-connected conditions for pension. The code sheet also includes the combined total of all the SC conditions. An explanation of analogous codes, coded conclusions, SCM Codes, Combat Status Codes, special notations and any additional service codes are also reflected in the code sheet. The code sheet also notes the signature(s) of the rating specialist. This section also reviews the specifics of the IDES proposed and final rating code sheet. Examples are included throughout. |
| **TIME REQUIRED**  | 0.25 hours  |
| **OBJECTIVES/** **TEACHING POINTS**   | Topic objectives: * Define the sections of the rating code sheet • Describe the lay out of the Data Table.
* Identify the difference(s) between an IDES proposed code sheet and the final rating code sheet

 The following topic teaching points support the topic objectives: * Define the sections of the code sheet
* Explain the lay out of the Data Table
* Identify the difference(s) between an IDES proposed code sheet and the final rating code sheet

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| **Rating Code Sheet** *Slide 32-33* *Handout 15*  | The second major part of the rating decision is the Code Sheet, which contains the following subparts: 1. Data Table
2. Jurisdiction
3. Coded Conclusion
4. Special Notations and Template Fields
5. Signature(s)

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| **Data Table** *Slide 34* *Handout 15-16*  | The Data Table includes: * Personal identifying information such as name, social security number, pos, poa, file number, and date of rating
* Any future exam date(s)
* SMC code(s)
* Combat status code
* Additional service code

**Note:** on IDES proposed ratings for service members who are still serving on active duty, there should be an entered on active duty (EOD) date listed without a release from active duty (RAD) date in the data table. Future exam date coding shows up as “none” on all proposed rating code sheets, even in cases where a future exam would be necessary. The actual future exam indicators only show up on final rating decisions.  |
| **Jurisdiction** *Slide 35* *Handout 16-17*  | The Jurisdiction section describes the type of claim that was decided and the date the claim was received. It will also indicate the associated pending issue file (PIF)   |
| **Associated Claims** *Slide 36* *Handout 17*  | The Associated Claim(s) section * appears below the Jurisdiction
* includes 689 end product(s) (EP) associated with the contentions/claims be processed along with the DOC(s) of the claim(s)
* cites the type of claim(s)

**Associated Claim(s):** 689; Disability Evaluation System; 06/05/2018For proposed ratings, you will see an End Product (EP) 689 for the associated claim. For final ratings, you will see either an EP 010, 110, or 020 depending on the type of associated claim.   |

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| **The Proposed Rating** **Code Sheet** *Slide 37* *Handout 17*  | A proposed rating code sheet provides the following information in the following order: Proposed Disability Evaluation Rating System (DES) Service connected for proposed grants of SC or Proposed DES Not Service Connection (NSC), for proposed denials of SC. Proposed Special Monthly Compensation (SMC) entitlement and Ancillary benefits entitlement if applicable.  **Note:** Proposed rating decision code sheets for active-duty members only list the issues being addressed in connection with the pending IDES claim. Any prior SC or NSC decisions will be carried forward on the final DES rating.  |
| **IDES Proposed Coded** **Conclusion** *Slide 38* *Handout 18*  | The Coded Conclusions section provides the list of conditions that are proposed DES service connected or proposed not DES service connected. This section may also include all **previous rating for Reserve or National Guard members.** 38 CFR Part 4, Rating Schedule for Disabilities, is used to determine disability codes and percentages of evaluation.   |
| **Analogous Codes** *Slide 39* *Handout 18-19*  | Raters use analogous codes to evaluate disabilities not listed in [38 CFR Part 4, VA Schedule for Rating Disabilities.](http://www.ecfr.gov/cgi-bin/text-idx?SID=eb7493eb29df5c572d488350d31b4925&node=pt38.1.4&rgn=div5) When a condition unlisted in the rating schedule is encountered, it is permissible to rate it under a closely related disease or injury, in which not only the functions affected, but the anatomical localization and symptoms are closely analogous. The analogous code consists of two diagnostic codes (DC’s) separated by a hyphen. The first DC of an analogous code is a four-digit code which the first two digits refer to the body system involved in the rating, and the second two digits are always 99. The second DC of an analogous code is taken from the rating schedule and identifies the criteria used to evaluate the claimed disability. Ex: 6599-6516 is for post-operative tonsillectomy if the condition is evaluated under the criteria for chronic laryngitis. Note: NOT all hyphenated codes denote an analogous rating. See [III.iv.6.E.2.c. Using Hyphenated codes to Rate Residual Conditions](https://vaww.vrm.km.va.gov/system/templates/selfservice/va_kanew/help/agent/locale/en-US/portal/554400000001034/content/554400000014208/M21-1-Part-III-Subpart-iv-Chapter-6-Section-E-Coded-Conclusion?query=analogous%20code) and [III.iv.6.E.2.d. Rating Multiple Disabling Manifestations From the Same Disease](https://vaww.vrm.km.va.gov/system/templates/selfservice/va_kanew/help/agent/locale/en-US/portal/554400000001034/content/554400000014208/M21-1-Part-III-Subpart-iv-Chapter-6-Section-E-Coded-Conclusion?query=analogous%20code)   |

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| **Combined** **Evaluations** *Slide 40* *Handout 19*  | The coded conclusion contains the: * Current combined evaluation
* Historical combined evaluation(s), and
* The effective date(s) for each combined evaluation

The percentage of disabilities is not added together but is determined based on the combined rating table and bilateral factor located in [38 C.F.R. §4.25.](https://www.ecfr.gov/cgi-bin/text-idx?SID=ad275643432556b9dda942343fb89296&mc=true&node=pt38.1.4&rgn=div5#se38.1.4_125) **Exception:** Proposed evaluations, such as under the IDES program or proposed reductions, are not reflected in the combined evaluation **Note:** VBMS-R automatically calculated each combined evaluation effective date based on the issues established and effective dates entered.  |
| **Special Monthly** **Compensation (SMC)** *Slide 41* *Handout 20*  | Special Monthly Compensation (SMC) recognizes the severity of certain disabilities or combinations of disabilities by adding an additional compensation to the basic rate. The most common Special Monthly Compensation (SMC) grants are: * Loss/Loss of use of (SMC K)
* Aid and attendance (SMC L)
* Statutory Housebound (SMC S)

 Note: for more information on SMC ratingssee [§3.350 Special Monthly Compensation Ratings.](https://vaww.vrm.km.va.gov/system/templates/selfservice/va_kanew/help/agent/locale/en-US/portal/554400000001034/content/554400000018860/01-3350-Special-monthly-compensation-ratings?query=special%20monthly%20compensation) |

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| **Special Notations** *Slide 42* *Handout 20-21*  | Occasionally, the RVSR will input comments in the Special Notations box. The comments can include, but are not limited to, interpretation of the rating schedule on the claim, special instructions to authorization\*, reminders for the final rating (example: if a future exam will be necessary) and SMC codes on proposed rating decisions. \* The special notation box is also used by RVSRs to advise the VSR to invite a claim for any unclaimed/non-referred issues that were diagnosed on exam. The RVSR will input comments in the Special Notations box, which can include: * Interpretation of the rating schedule on the claim (Reviewer notes)
* Special instructions to authorization (such as soliciting a claim for an issue found on exam)
* Reminders for the final rating
* Entitlement to ancillary benefits

 Instructor(s): You may want to take this opportunity to show the audience an actual (live) Proposed Rating Decision.  |
| **The Final Rating** **Code Sheet** *Slide 43* *Handout 21*  | On final IDES rating decisions (post separation and Reserve/NG members) the coded conclusion will; * Identify the PEB-referred disabilities with special issue coding following the disability name
* Any condition for which disability severance pay was received
* Combat or non-combat

*If the Veteran received disability severance pay for an unfitting condition, it will be identified on the final DES rating decision, accordingly, following the disability name. There are two types of*  |
|  | *severance pay: Combat-Related [Enhanced Disability Severance Pay] and Not Combat-Related (Disability Severance Condition).* **Important***: A final rating decision and notification letter are provided to the PEB in lieu of a proposed rating and BEL for non-active duty Reserve or National Guard cases. The document provided to the PEB must meet all specifications prescribed to the “proposed rating” under, M21-1, Part III, Subpart i, 2.E.3, unless otherwise noted.***Instructors:** an example provided on the power point slide, use this as a talking point call out the indicators that this condition is related to the IDES program, and it is PEB referred. Before proceeding with the PowerPoint you may want to take this time to show an actual IDES Final Rating Code Sheet. You may want to point out to the audience the difference between the Proposed Rating and a Final Rating.  |
| **Knowledge check** *Slide 44-45*  | 1. What are the parts of the Rating Code Sheet?

**Data table, Jurisdiction, Associated claims(s), Coded conclusions, Special notations and Template fields and** **Signature(s)** 1. Which of the decisions below would you see on a Proposed Rating Code Sheet? Choose all that apply.
	1. Identify the PEB-referred disabilities with special issue coding following the disability name.
	2. **Proposed DES Service Connection for proposed grants of service connection (SC)**
	3. **Proposed Special Monthly Compensation (SMC) entitlement**
	4. Combat or Non-combat
2. What is the SMC code for statutory housebound status?

**SMC S – Statutory Housebound**  |

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| **TOPIC 4: ANCILLARY BENEFITS AND THE BENEFITS ESTIMATE LETTER (BEL)**  |
| **INTRODUCTION**  | This topic reviews ancillary benefits that the Veteran may be eligible for based on the SC rating. Additionally, MSC’s receive a general overview of the Benefits Estimate Letter (BEL). Although it is not the MSC’s responsibility to generate this letter it is important to know when and why the letter is generated and to recognize if the letter is not included in the Veteran’s file. The MSC will recognize the information provided on a BEL and when a BEL is indicated as part of the Veteran’s file.  |

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| **TIME REQUIRED**  | 0.15 hours   |
| **OBJECTIVES/** **TEACHING POINTS**   | Topic objectives: * Identify ancillary benefits which may be applicable to the rating.
* Identify the information in a Benefits Estimate Letter (BEL) and,
* Recognize if a BEL should be provided to or included in the Veteran’s file.

The following topic teaching points support the topic objectives: * Ancillary benefits related to SC conditions. Most common ancillary benefits.
* What is a Benefits Estimate Letter (BEL)?
* When a BEL will be generated and part of the Veteran’s file.
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| **Ancillary Benefits** *Slide 46-48* *Handout 21-22*  | The following are more commonly seen ancillary benefits that may be addressed on the rating, if applicable: * Eligible for Civil Service Preference
* Entitled to Adaptive Equipment Only
* Entitled to Automobile and Adaptive Equipment
* Entitled to Loan Guaranty Benefits
* DEA under [38 U.S.C. Chapter 35](https://www.law.cornell.edu/uscode/text/38/part-III/chapter-35)
* SAH under [38 CFR 3.809](https://www.ecfr.gov/cgi-bin/text-idx?SID=eb7493eb29df5c572d488350d31b4925&node=se38.1.3_1809&rgn=div8)
* Special housing adaptation (SHA) awards under [38 CFR](https://www.ecfr.gov/cgi-bin/text-idx?SID=eb7493eb29df5c572d488350d31b4925&node=se38.1.3_1809a&rgn=div8)

[3.809a](https://www.ecfr.gov/cgi-bin/text-idx?SID=eb7493eb29df5c572d488350d31b4925&node=se38.1.3_1809a&rgn=div8) * Automobile and adaptive equipment under [38 CFR 3.808](https://www.ecfr.gov/cgi-bin/text-idx?SID=eb7493eb29df5c572d488350d31b4925&node=se38.1.3_1808&rgn=div8)
* Vocational rehabilitation and employment, and
* Loan guaranty for surviving spouses under [38 CFR 3.805](https://www.ecfr.gov/cgi-bin/text-idx?SID=eb7493eb29df5c572d488350d31b4925&node=se38.1.3_1805&rgn=div8)

Active-duty IDES participants are eligible for and automatically entitled to Vocational Rehabilitation and Employment (VR&E) services. MSC’s must direct the participant to an IDES Vocational Rehabilitation Counselor (VRC) when the service member expresses interest in VR&E services. Veterans who have a compensable SC disability maybe eligible for a waiver of the VA home loan funding fee, if VA Form 26-1880, Request for a Certificate of Eligibility is received, MSC’s must act by forwarding the form to the appropriate regional loan center (RLC) as well as ascertain if the service member plans to use VA’s home loan program and advise the service member to let his/her lender know a predischarge claim is pending.  |

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| **Benefits Estimate** **Letter (BEL)** *Slide 49* *Handout 22-23*  | The purpose of the BEL is to provide the participant with a proposed estimate of VA benefits to assist him/her with financial planning following discharge from active duty. The BEL contains; * Salutation and gratitude for the SMs service
* Overview of the MEB finding and notification that eligibility to VA benefits is contingent on the requisite character of service on discharge
* Purpose of the BEL
* What the VA is proposing, and
* What the SM may be entitled to if separated

**Note:** The DRAS must include dependents on the BEL when VA Form 21-686c, Declaration of Status of Dependents, is of record and complete. See [M21-1, Part III, Subpart I, 2.E.6.Exhibit: Benefits Estimate Letter (BEL) for IDES Participants](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?query=Benefit%20estimate%20letter) **Instructor:** Explain to the audience that the DRAS must prepare a notification letter in conjunction with proposed rating decisions. There is guidance for participants who are on active duty and not on active duty. **III.i.2.E.3.k. Notification Letter to Accompany Proposed Rating Decisions.**   |

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| **Knowledge check** *Slide 50-51*  | 1. What are the parts of the Rating Code Sheet?

**Data table, Jurisdiction, Associated claims(s), Coded conclusions, Special notations and Template fields and** **Signature(s)** 1. Which of the decisions below would you see on a Proposed Rating Code Sheet? Choose all that apply.
	1. Identify the PEB-referred disabilities with special issue coding following the disability name.
	2. P**roposed DES Service Connection for proposed grants of service connection (SC)**
	3. **Proposed Special Monthly Compensation (SMC) entitlement**
	4. Combat or Non-combat
2. What is the SMC code for statutory housebound status?

**SMC S – Statutory Housebound**   |

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|  | **PRACTICAL EXERCISE**  |
| **TIME REQUIRED**  | 0.25 hours  |
| **EXERCISE** *Handout 24-25*  | Review the practical exercise and have trainees engage in discussion. Ask if there are any questions about the information presented in the exercise, and then proceed to the Review. |

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|  | **LESSON REVIEW AND WRAP-UP**  |
| **INTRODUCTION** *Discuss the following:*  | The Rating Decisions for the Integrated Disability Evaluation System (IDES) lesson is complete. Review each lesson objective and ask the trainees for any questions or comments.  |
| **TIME REQUIRED**  | 0.25 hours  |
| **LESSON** **OBJECTIVES**  | You have completed the Rating Decisions for the Integrated Disability Evaluation System (IDES) lesson. The trainee should be able to: * the components of a proposed and final rating decision
* explain the difference between an IDES proposed rating versus the final rating and
* the components of a BEL and when it is required.
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