Monthly Benefits Delivery at Discharge (BDD) and

Integrated Disability Evaluation System (IDES) Conference Call

Compensation Service

BDD/IDES/Mil Pay Staff (212A)

April 9, 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.

This read-ahead is provided to facilitate discussion during the conference call. Meeting Call Notes including questions asked during the call will be posted on the [IDES](https://vbaw.vba.va.gov/vbadod/IDES.asp) and [Pre-Discharge](https://vbaw.vba.va.gov/vbadod/predischarge.asp) intranet sites under **2019 Monthly Conference Call Schedule & Notes.** The call notes, PowerPoint presentation and Lync recording will also be available in TMS. The TMS number will be provided during the call.

Please sign–up for the [C&P Calendar Subscription Service](http://vbacodmoint1.vba.va.gov/bl/21/calendar/cal_Subscribe.asp) to receive notification that the read-ahead is available and for notification when the TMS number is active.

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

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

Topics for Discussion

**HAIMS Issue Impacting Document Transfer to VBMS**

Improvement has been noted for the most recent document conversion issue, that impacted the transfer of STRs in IDES and BDD cases, and standard VA claims from post- discharge Veteran as well. There is additional development being conducted to increase capability and achieve real- time processing. There is also an additional fix related to auto-retry of failed transfers that should be implemented at the end of April.

IDES intake sites may continue to use ARMDEC SAFE (or other approved means) to transfer IDES referrals. However, once this HAIMS issue is completely 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.

**AMA Impact on Military Services Coordinator Responsibilities**

The Appeals Modernization Act was implemented on February 19, 2019. The impact of AMA on the IDES, to include changes to MSC/DRAS responsibilities, is addressed in the document *AMA Implications in IDES*, (available on the IDES Homepage) was discussed during the March IDES/BDD Teleconference. Changes to MSC Responsibilities related to the AMA are explained further below.

**Handling Previously Denied Issues that are Indicated on IDES Applications**

IDES MSCs must continue to consider whether claimed or referred issues raised in IDES have been previously denied by VA. However, previously denied issues indicated on VA Forms 21-0819 or 21-526EZ are no longer considered formally claimed for VA purposes. MSCs are no longer required to consider whether new and material evidence was submitted in these instances. These issues will not be considered during the IDES process, except when the condition was referred by the Service Department.

If the denied issue was listed on the 21-0819, the MSC must:

* list the condition as contention under the EP 689,
* order examinations for the condition, and
* explain to the participant that the condition not considered formally claimed for VA purposes and willbe considered in IDES for DoD purposes only.

If the denied issue was listed on the 21-526EZ only (not the 21-0819), the MSC must:

* **not** list the contention under the EP 689,
* **not** order exams for the condition, and
* explain to the participant that the condition not considered formally claimed for VA purposes and will **not** be considered in IDES.

Additionally, the 21-0819 and/or 21-526EZ must be considered a request for application (RFA). As such, the MSC must establish an EP 400 and process the RFA in accordance [M21-1 III, ii, 2.C.6.a.](https://vaww.vrm.km.va.gov/system/templates/selfservice/va_kanew/help/agent/locale/en-US/portal/554400000001034/content/554400000014115/M21-1%2C-Part-III%2C-Subpart-ii%2C-Chapter-2%2C-Section-C---Informal-Claims-Received-Prior-to-March-24%2C-2015%2C-Communication-of-an-Intent-to-File-%28ITF%29%2C-and-Requests-for-Application#6)

***Exception:*** The MSC should not consider the 21-0819 and/or 21-526EZ as request for application if:

* the condition was listed on the 21-0819, but the participant didn’t list the condition on the 21-526EZ ***and*** explicitly indicates that they do not want the issue considered for VA purposes (this indication must be captured on a VA Form 27-0820 or 21-4138), or
* there is already a supplemental claim or appeal for the same issue currently pending.

**Handling Previously Denied Issues that are Indicated on BDD Applications**

When previously denied issues are indicated on 21-526 series applications submitted as part of a BDD claim, the MSC must establish an EP 400 and process the RFA in accordance [M21-1 III.ii.2.C.6.a](https://vaww.vrm.km.va.gov/system/templates/selfservice/va_kanew/help/agent/locale/en-US/portal/554400000001034/content/554400000014115/M21-1-Part-III-Subpart-ii-Chapter-2-Section-C-Informal-Claims-Received-Prior-to-March-24-2015-Communication-of-an-Intent-to-File-ITF-and-Requests-for-Application#6). The previously denied condition should not be listed as a contention under the BDD EP and should not be noted on the BDD examination request.

**The AMA IDES guidance discusses how to handle denied condition that are indicated on a VA Form 21-526EZ. But what if the Servicemember indicates they want to claim a denied issue during the initial interview, *before* they complete the VA Form 21-526EZ. Can we give them the new claim form (VA Form 21-0995 or 21-0996) for previously denied claims? Will the MSC take the completed VA Form 21-0995 or 21-0996 for previously denied claims?**

Yes. In these instances, the MSC can provide the participant with a VA Form 21-0995 or 21-0996 and can take the completed form from the participant. The MSC should handle the 21-0995/6 in accordance with block 1.c in the posted [AMA guidance](https://vbaw.vba.va.gov/VBADOD/docs/IDES/AMAImplicationsinIDESV2.pdf) (i.e., take no action on the supplemental claim, except to ensure the application is sent to the scanning vendor).

The MSC does not need to send the intent to file if the condition is not listed on the 21-526EZ or the participant has submitted the 21-0995/6 for the condition.

**MSCs Not Involved in Supplemental Claim/Appeal Processes**

If the participant submits a prescribed form to initiate a supplemental claim or appeal (or a supplemental claim or appeal is pending), the MSC will continue to address BDD/IDES issues in accordance with standard procedure, however MSCs will **not** be involved in the processing of the supplemental claim/appeal. MSCs will continue to address the address. Supplemental claims/appeal issues will be controlled by a separate EP processed outside of BDD/IDES by DROC/VSC personnel.

VA Correspondence related to supplemental claims and appeals will direct participants to submit applications/evidence to the appropriate Intake Center. However, if any application or correspondence relating to an appeal or supplemental claim is received at an outbased intake site, the MSC/Intake site must:

* date stamp the documents, and
* ensure the documents are shipped to the appropriate scanning vendor **in accordance with** [M21-1 Part III, ii, 1.E.2.c](https://vaww.vrm.km.va.gov/system/templates/selfservice/va_kanew/help/agent/locale/en-US/portal/554400000001034/content/554400000032384/M21-1%2C-Part-III%2C-Subpart-ii%2C-Chapter-1%2C-Section-E---Centralized-Mail-%28CM%29-Intake).

Any necessary EPs will be established after the applications are sent to the scanning vendor. EPs for supplemental claims/appeals issues should not be established by MSCs/Intake Sites.

**MSC Curriculum (Station-Selected Training Items)**

The following MSC/IDES Curriculum station-selected training items have been updated and are available in the VBA Learning Catalog:

• IDES Referral and Re-Enrolled Cases (VA 4500833)

• Interview Skills and Strategies (MSC) (VA 4500831)

• Processing IDES Referrals (MSC) (VA 4500890)

• Rating Decisions for the Integrated Disability Evaluation System (IDES) (VA 4500902)

• Records Management for Military Services Coordinators (MSC) (VA 4500919)

• Review of Service Treatment Records (STRs) for IDES (VA 4500913)

• Workload and Time Management - Military Services Coordinator (MSC) (VA 1349075)

These items are station-selected training items and are not mandated training items. This announcement is for informational purposes. Questions regarding these trainings should be directed to the Compensation Service Training Staff at CPTraining.VBACO@va.gov.

**None of these courses were released, do I need to contact the Compensation Service training mailbox? Shouldn't these classes be assigned as these are relevant to us?**

The MSC training items are station-selected. If courses are not assigned in TMS, the MSC should reach out to their coach or training manager.

**Letter Creator and IDES Updates**

Version 6.4 of the Letter Creator is now available on the [Rating Jobs Aids Page](https://vbaw.vba.va.gov/bl/21/rating/rat00.htm). The following updates on IDES are included in this release:

* Added a “New” letter template titled “IDES Benefits Estimate Letter". This letter will display when VSC is selected as the area.
* Added IDES Fact Sheet to the form printing options.

**Required Use of ERB-S in EMS Examination Requests**

In some specific instances, claims processors (including MSCs) are required to use [the Simplified Exam Request Builder tool (ERB-S)](http://vbacodmoint1.vba.va.gov/bl/21/sitevisit/erb/ERB.asp) when submitting examination scheduling requests via EMS.

The ERB-S tool is described in [M21-1 III.iv.3.A.2.f,](https://vaww.vrm.km.va.gov/system/templates/selfservice/va_kanew/help/agent/locale/en-US/portal/554400000001034/content/554400000015809/M21-1-Part-III-Subpart-iv-Chapter-3-Section-A-Examination-Requests-Overview?query=exam%20request%20builder#10b) and the requirement for its use is defined in [M21-1 III.iv.3.A.10.b](https://vaww.vrm.km.va.gov/system/templates/selfservice/va_kanew/help/agent/locale/en-US/portal/554400000001034/content/554400000015809/M21-1-Part-III-Subpart-iv-Chapter-3-Section-A-Examination-Requests-Overview?query=exam%20request%20builder#2f).

The [ERB-S Usage Matrix](https://vaww.vrm.km.va.gov/system/templates/selfservice/va_kanew/help/agent/locale/en-US/portal/554400000001034/content/554400000105052/ERB-S-Usage-Matrix), provides instructions for using ERB-S, and lists the specific instances in which use of the ERB-S tool is mandatory. These instances are summarized below.

MSCs must use the ERB-S tool, in any instance in which a request being submit via VBMS/EMS, involving:

* a medical opinion based on personal trauma other than military sexual trauma (MST)
* prioritization based on the examinee's receipt of a Purple Heart decoration
* a peripheral nerves examination
* a musculoskeletal examination involving one or more joint(s)
* completion of any of the following for a female claimant:
* Diabetes Mellitus Disability Benefits Questionnaire
* Parkinson's Disease Disability Benefits Questionnaire
* Amyotrophic Lateral Sclerosis (ALS-Lou Gehrig's Disease) Disability Benefits Questionnaire
* Central Nervous System and Neuromuscular Diseases Disability Benefits Questionnaire, and/or
* Multiple Sclerosis (MS) Disability Benefits Questionnaire

Further, as a reminder, MSCs must always use the standard ERB tool when requesting examinations via CAPRI.

**Is the M21-1 updated with the ERB-S change?**

Yes. There are two M21-1 sections on *ERB-S Tool*, [M21-1, III.iv.3.A.2.f](https://vaww.vrm.km.va.gov/system/templates/selfservice/va_kanew/help/agent/locale/en-US/portal/554400000001034/content/554400000015809/M21-1-Part-III-Subpart-iv-Chapter-3-Section-A-Examination-Requests-Overview#2f), and, *Types of Requests Requiring Supplemental Language from the ERB-S Tool*, [M21-1, III.iv.3.A.10.b](https://vaww.vrm.km.va.gov/system/templates/selfservice/va_kanew/help/agent/locale/en-US/portal/554400000001034/content/554400000015809/M21-1-Part-III-Subpart-iv-Chapter-3-Section-A-Examination-Requests-Overview#10b).

**Is the ERB-S required for BDD claims for QTC requests as well?**

If you are using EMS (requesting the exam through VBMS), you must use ERB-S.

**Where is the ERB-S tool?**

The ERB-S tool is linked here: [the Simplified Exam Request Builder tool (ERB-S)](http://vbacodmoint1.vba.va.gov/bl/21/sitevisit/erb/ERB.asp).

**Do we need to paste the paragraph in the QTC exam request for peripheral nerves?**

Yes, peripheral nerves examination is listed as a specific instance in which use of the ERB-S tool is mandatory. There are specific instances in which use of Sharp language is required listed in the [ERB-S Usage Matrix](https://vaww.vrm.km.va.gov/system/templates/selfservice/va_kanew/help/agent/locale/en-US/portal/554400000001034/content/554400000105052/ERB-S-Usage-Matrix).

**Review of Musculoskeletal Examinations for Required Information relating to Sharp v. Shulkin**

As described in [M21-1 III.i.2.D.7.c](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#7c), MSCs must complete a review of examination results to ensure completeness. As part of this review, MSCs must ensure that, when applicable, the examiner includes some explanation as to why information could not be provided without speculation. This requirement for the examiner’s explanation is specified in [M21-1 III.iv.3.D.2.r,](https://vaww.vrm.km.va.gov/system/templates/selfservice/va_kanew/help/agent/locale/en-US/portal/554400000001034/content/554400000015812/M21-1-Part-III-Subpart-iv-Chapter-3-Section-D-Examination-Reports?query=Sharp#4) and is related to the CAVC decision in Sharp v. Shulkin.

Specifically, MSCs should consider any musculoskeletal DBQ, and closely review the sections titled, *Repeated Use Over Time* and *Flare Ups*. If, in response to a question in these sections, an examiner checks/indicates, “unable to say without mere speculation,” the MSC must ensure that the examiner provided some explanation/rationale for that response. If an examiner indicated that the question could not be answered without mere speculation, but failed to provide any explanation, then the MSC should consider the examination results incomplete, and must request clarification from the examiner before continuing with IDES processing. In the request for clarification, the MSC should cite the specific language from the ERB/ERB-S (related to an examiner’s inability to provide a response without speculation), and ask the examiner to provide an explanation in an addendum to the DBQ.

MSCs must review all musculoskeletal DBQs for the required Sharp language; however, MSCs should take particular note of any musculoskeletal examination that was:

* requested in CAPRI before the Sharp language was added to the ERB-S tool (February 15, 2019),
* requested in EMS before the Sharp language was added to the ERB-S tool (March 15, 2019), or
* submitted in CAPRI or EMS, at any time, without the use of the ERB or ERB-S tool.

***Note:*** MSCs should not make any determination regarding the value or sufficiency of an examiner’s explanation—that responsibility remains with rating activity at the DRAS. MSCs only need to identify DBQs in which the examiner failed to provide *any explanation whatsoever* when indicating that required information could not provide without speculating.

**Do we need to include the verbiage from the ERB-S tool for joints exams in EMS under *Special Instructions?***

The [ERB Usage Matrix](https://vaww.vrm.km.va.gov/system/templates/selfservice/va_kanew/help/agent/locale/en-US/portal/554400000001034/content/554400000105052/ERB-S-Usage-Matrix) indicates where in the EMS request the language must be pasted.

For musculoskeletal exams involving joints, (and all other situations requiring ERB-S *except* MST exams) the ERB language must be pasted into the *Special Instructions* section of the exam request. The MST language should be entered under *Supporting Specialty Language Information.*

**Is the ERB tool language for musculoskeletal conditions required to be pasted into the contentions for every joint claimed or is it sufficient to paste it into just one joint and it be applicable for all joints?**

The required ERB language must be manually added under **each** applicable contention on the exam request.

**General Reminders to IDES MSCs**

* Entrance physicals must be provided/obtained, except when specifically deemed unavailable by the PEBLO in the STR Statement indicated in Section III the 21-0819.
* EP 689s should be brokered to the DRAS after all development is complete
* All tracked items must be closed/resolved prior to brokering the EP 689s to the DRAS.
* MSCs must review all completed exams to ensure all claimed issues were addressed prior to releasing exams to the PEBLO and brokering to the DRAS.
* MSCs must verify the duty status of Guard/Reserve members (and if applicable, obtain activation orders, verify prior periods of active service)
* MSCs should not immediately email the DRAS to inquire about a claim until they have first reviewed VBMS and VTA to try to determine the status of the claim/
* If the Medical Evaluation Stage is closed out *without* exams for any claimed or referred condition, there must be detailed notes in VTA and/or VBMS explaining why the case was moved forward without exam(s).***Important:***Cases should only proceed without exams for referred conditions, when there is documented agreement from the MEB on this course of action.

VTA Reminders

**Servicemembers Who 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.

MSCs must select *Yes* for this field when the participant files a VA claim, and a number is entered in the *Total claimed conditions* field. In situations when the participant does *not* file a VA claim, the MSC must select *No* and ensure this is appropriately documented as required by [M21-1 III.i.2.D.4 (step 5).](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#2) MSCs must not indicate No in this field simply because the participant fails to sign or return a VA Form 21-526.

**Do we still check yes if the Servicemember does not return the form at all?**

Unless the participant specifically declines to file a VA claim, the field should reflect “yes.”

**Can I get a copy of the PowerPoint slides for the call?**

During the call, you can click on the monitor icon in the Skype meeting window, then click on "Manage Content", then, select and download the PowerPoint slide deck. The PowerPoint will also available in TMS after the call.

### VTA Training

VTA Training is April 16 (9ET) and 17 (1ET).

BDD Specific Topics

eBenefits Claims Establishment Errors

Compensation Service have found some BDD claims that were submitted in eBenefits were established by eBenefits as an EP 010/110 with the eBenefits claim label not as an EP 336 with the BDD claim label. If you know of any BDD claims submitted on eBenefits, review the EP and claim label to ensure the proper EP 336 with the BDD claim label is established. Compensation Service is working to address this issue and will release guidance when it is resolved.

**Are the issues relating to the BDD excluded claims established as Quick Start claim types completely resolved?**

Claims submitted electronically are still being established as an EP 337 with a Quick Start claim label. Per [M21-1 III.i.2.A.2.f](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#2f), "the EP 337 must be changed to the appropriate rating EP upon receipt for processing as BDD-excluded claims."

**Are there BDD excluded claims that had exams stuck in error, still being assigned in VBMS?**

Yes, these claims are still routed by NWQ. If you have an exam stuck in EMS, please submit a help ticket and you can contact the Mandatory Contract Exam Staff at VAVBAWAS/CO/Contract Examination Inquiries, ContractExam.VBAVACO@va.gov and provide the specific help ticket number and the claim numbers.

**When requesting exams for Quick Starts claims, are we required to provide the DBQ for each contentions? Because several of my exam requests have been returned for RAD and DBQ. I provided the RAD and each DBQ, however my requests are being returned.**

Yes, you must provide the appropriate DBQ for each contention. If you are selecting a General Medical/SHA DBQ, EMS will allow you to select the appropriate contentions to be examined under a General Medical/SHA DBQ. [M21-1 III.iv.3.A.6.a](https://vaww.vrm.km.va.gov/system/templates/selfservice/va_kanew/help/agent/locale/en-US/portal/554400000001034/content/554400000015809/M21-1-Part-III-Subpart-iv-Chapter-3-Section-A-Examination-Requests-Overview#6a) provides the specific DBQs that need to be added for examinations performed by specialists. If exam requests are being returned by contract examiners without proper reason, please reach out to the Mandatory Contract Exam Staff at VAVBAWAS/CO/Contract Examination Inquiries ContractExam.VBAVACO@va.gov and provide the specific claim numbers.

You can access the reason for clarification by clicking on the "Exams" tab in VBMS, then clicking on the "i" blue icon.

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 April 3, 2019.

|  |  |
| --- | --- |
| **April** **3, 2019** | **BDD** |
| **Completed FYTD** | **17,004** |
| **Receipts FYTD** | **16,730** |
| **Pending** | **4,685** |
| **# Completed w/in 30 Days of Discharge** | **9,562** |
| **% Completed w/in 30 Days of Discharge** | **56%** |
| **Average Days Pending** | **78.5** |
| **Avg. Days to Complete FYTD** | **54.36** |

**Source:** Tableau BDD History Report, April 4, 2019

### From the Pre-Discharge BDD Mailbox

**Question:** I have gotten several Quality Review errors for not adding tracked items and processing BDD excluded claims, which were overturned. Can we please address what tracked items the intake sites should be using for BDD excluded claims?

**Answer:** Per [M21-1 III.i.2.A.2.h](https://vaww.vrm.km.va.gov/system/templates/selfservice/va_kanew/help/agent/locale/en-US/portal/554400000001034/content/554400000014099/M21-1%2C-Part-III%2C-Subpart-i%2C-Chapter-2%2C-Section-A---General-Information-on-Pre-Discharge-Claims#2), intake sites are required to establish the BDD excluded claim including entering the contentions and enter the *BDD-Excluded* special issue indicator under one contention requiring an examination. Per [M21-1 III.i.2.B.3.b](https://vaww.vrm.km.va.gov/system/templates/selfservice/va_kanew/help/agent/locale/en-US/portal/554400000001034/content/554400000014101/M21-1%2C-Part-III%2C-Subpart-i%2C-Chapter-2%2C-Section-B---Division-of-Responsibilities-for-Processing-Benefits-Delivery-at-Discharge-%28BDD%29-and-BDD-Excluded-Claims#3), the ROJ is responsible for processing BDD-excluded claims.

Per [M21-1 III.iii.1.F.3.b](https://vaww.vrm.km.va.gov/system/templates/selfservice/va_kanew/help/agent/locale/en-US/portal/554400000001034/content/554400000071983/M21-1%2C-Part-III%2C-Subpart-iii%2C-Chapter-1%2C-Section-F---Record-Maintenance-During-the-Development-Process#3), tracked items are established automatically for corresponding development actions. Custom tracked items can be manually established by the claims processor. If no development action was taken, no tracked items should be entered.

**Question:** I have a BDD claim that was submitted electronically 91 days before the Servicemember’s date of discharge. The claim included all the required documents (VA Form 21-526 and STRs). The claim was reviewed several days after the claim was submitted. The examinations were not ordered in the 90-180 day time frame from date of discharge. Is the claim still eligible for the BDD program?

**Answer:** Yes, the claim is still eligible for the BDD program. The time frame for when examinations are requested are not part of the BDD program requirements.

Open Floor

Next Teleconference

The next call is scheduled for Tuesday, May 14, 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, May 2, 2019.