Monthly Benefits Delivery at Discharge (BDD) and

Integrated Disability Evaluation System (IDES) Conference Call Notes

Compensation Service

BDD/IDES/Mil Pay Staff (212A)

July 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.

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 # VA 4521256 has been created to provide training credit for the July 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

**Questions and Answers from the June 2019 Exam Liaison Call**

**Looking for guidance regarding exam request issues? Questions and Answers from the June 2019 Exam Liaison Call have been added to the** [Exam Liaison Call Notes](https://vbaw.vba.va.gov/bl/21/contractexams/docs/EXAM%20LIAISON%20CALL%20QA%20June%2013%2C%202019.pdf) **on the** [MDEPO Quick Links page](https://vbaw.vba.va.gov/bl/21/contractexams/links.htm)**.**

IDES Specific Topics

**Date of Claim (DOC) for all IDES Issues Generally Determined by Date of Receipt of 21-0819**

A 2018 update to [M21-1.III.ii.2.B.1.b.](https://vaww.vrm.km.va.gov/system/templates/selfservice/va_kanew/help/agent/locale/en-US/portal/554400000001034/content/554400000014119/M21-1-Part-III-Subpart-ii-Chapter-2-Section-B-Claims-for-Disability-Compensation-and-or-Pension-and-Claims-for-Survivors-Benefits) removed all references to the VA Form 21-0819 from the list of prescribed forms for VA claims purposes.  This update was made to reflect IDES procedural changes that provide IDES participants with the option to decline to file a VA claim, and require a VA Form 21-526EZ from those who elect to file a claim.

The change to M21-1.III.ii.2.B.1.b was intended only to indicate that when a participant declines to submit a 21-526EZ, the VA Form 21-0819 *alone* is not considered a prescribed form for VA claim purposes. This change was **not** meant to imply any other change to current IDES policy or practice.

The date VA receives the VA Form 21-0819 from the Service Department will continue to preserve the Veteran’s DOC for all IDES conditions (claimed/referred conditions) in any IDES case in which the Veteran goes on to submit a 21-526EZ at the initial IDES interview (as typical in most circumstances).

Per, [M21-1 III.i.2.D.5.a, Step 3](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%22%20%5Cl%20%226f), all claimed conditions indicated on a 21-526EZ that is submitted as part of the initial interview should be listed under the EP 689 and reflect the same date of contention as the issues indicated on the 21-0819. Any new issue submitted on 21-526 that is received *after* the initial IDES interview, must still be listed under the EP 689, but would **not** be considered part of the IDES claim, and must have a date of contention to reflect the date the new issue was raised.

The guidance above is applicable to all IDES cases; however, it has particular implications in cases involving IDES participants who are not on active duty (NAD). In NAD cases, the date of contention will generally be used to determine the effective date of award if benefits are granted for the condition.

**Question:** Will this be specified in the M21-1?

These requirements are currently indicated in the M21-1:

The requirements for determining the date of contention are currently specified in [M21-1 III.i.2.D.5.a (Step 3)](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#6f). The policy regarding the effective dates in NAD IDES claims is specified by M21-1 lll,i.2.F.2.d (Step 5).

**Requesting Medical Opinions and/or DRAS Review for Complex Medical Opinions**

IDES MSCs are reminded to consider the potential need for medical opinions when requesting examinations. Per [M21-1 III.i.2.D.6.e](https://vaww.vrm.km.va.gov/system/templates/selfservice/va_kanew/help/agent/locale/en-US/portal/554400000001034/content/554400000033257/M21-1%2C-Part-III%2C-Subpart-i%2C-Chapter-2%2C-Section-D---Overview-of-the-Integrated-Disability-Evaluation-System-%28IDES%29-and-Initial-Claims-Development), MSC are required to request basic or straightforward medical opinion requests (such as secondary service connection). MSCs must also consider whether any claimed or referred conditions are indicated on the participant’s entrance physical and request aggravation opinions accordingly.

MSCs may also identify the need for more complex medical opinions, and/or have some uncertainty about whether a medical opinion is required. In these instances, the MSCs should contact the DRAS for assistance via the mailbox indicated in the table below:

|  |  |
| --- | --- |
| **If the case involves a participant serving in the…** | **Then the MSC should request the opinion/review from…** |
| Army | dras.vbasea@va.gov  |
| Air Force | desaf.vbapro@va.gov |
| Navy or Marine Corps | des.vbapro@va.gov |

The email will have Subject Line: **MSC Complex Medical Opinion Request and VTA Case #**. MSCs must provide sufficient information for DRAS personnel to properly address the request. At minimum, [M21-1 III.i.2.D.6.f](https://vaww.vrm.km.va.gov/system/templates/selfservice/va_kanew/help/agent/locale/en-US/portal/554400000001034/content/554400000033257/M21-1%2C-Part-III%2C-Subpart-i%2C-Chapter-2%2C-Section-D---Overview-of-the-Integrated-Disability-Evaluation-System-%28IDES%29-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%2C-Part-III%2C-Subpart-i%2C-Chapter-2%2C-Section-D---Overview-of-the-Integrated-Disability-Evaluation-System-%28IDES%29-and-Initial-Claims-Development) requires that the MSC’s email indicate:

* that complex medical opinion is necessary
* the condition which requires a complex medical opinion, and,
* the reason a complex medical opinion is required.

[M21-1 III.i.2.D.6.f.](https://vaww.vrm.km.va.gov/system/templates/selfservice/va_kanew/help/agent/locale/en-US/portal/554400000001034/content/554400000033257/M21-1%2C-Part-III%2C-Subpart-i%2C-Chapter-2%2C-Section-D---Overview-of-the-Integrated-Disability-Evaluation-System-%28IDES%29-and-Initial-Claims-Development) stipulates that DRAS will respond to MSC requests within three business days. If the MSC does not receive a response from DRAS with three business days, it is recommended that the MSC: send a follow-up email to the appropriate DRAS mailbox, and if no response is received within three business days of that follow up email, notify Compensation Service at IDES.VBACO@va.gov. Under no circumstances, should the MSC just move forward with the exam request without resolution of the question of the medical opinion.

At this time, IDES rating delays are attributed to the need for medical opinions more frequently than any other reason. These delays are often unavoidable; the need for medical opinion may simply not be apparent until after the case has come under RVSR review. Still MSCs play a critical role in the medical opinion process and can help minimize delays by carefully considering the potential need for a medical opinion *before* requesting exams in IDES claims.

Compensation Service will soon begin coordinating refresher training on medical opinions for MSCs; more information will be provided as it becomes available. Further, VTA enhancements are currently under consideration that will serve to facilitate and manage requests submitted to the DRAS for medical opinion review (as an alternative to the current email process).

Returned to Duty Notification Letters (AMA Implications)

When IDES participants are returned to duty (or otherwise disenrolled from IDES for any reason besides a medical discharge), [M21-1,III.i.2.E.2](https://vaww.vrm.km.va.gov/system/templates/selfservice/va_kanew/help/agent/locale/en-US/portal/554400000001034/content/554400000046269/M21-1%2C-Part-III%2C-Subpart-i%2C-Chapter-2%2C-Section-E---Department-of-Veterans-Affairs-%28VA%29-Responsibilities-Based-on-Medical-Evaluation-Board-%28MEB%29-and-Physical-Evaluation-Board-%28PEB%29-Outcomes) requires that a notification letter be sent to the participant explaining that no further action is being taken on the IDES claim.

This notification letter is not considered a formal decision letter, and as such, is not subject to appeal or AMA notification requirements.

VA will consider applications from active duty IDES participants as formal VA claims (and will make a formal decision) only if the participant is medically discharged via the IDES process. Active Duty IDES participants who are found fit and returned to duty, or disenrolled from IDES without a medical discharge, do not get a decision or appeal rights.

IDES participants who are not on active duty, who are found fit and returned to duty are also sent notification letters explaining that they’ve been disenrolled from IDES, but VA will continue to process their claim outside of the IDES program. Here again, this notice is not a formal decision letter, and is not subject to appeal/AMA notification requirements.

AMA Reminders: Handling Previously Denied Issues raised in IDES

* Conditions that have been previously denied by VA are now considered supplemental claims. These conditions are no longer considered formally claimed when indicated on a VA Form 21-526EZ.
* Previously denied conditions will only be examined/considered in IDES if they have been referred by the Service Department as potentially unfitting conditions.
* If a previously denied condition is indicated on a VA Form 21-526EZ or VA Form 21-0819, the MSC must handle this as a request for application
* If the participant indicates their intention to claim a previously denied condition before completing the VA Form 21-0819, the MSC can provide the participant with a VA Form 21-0995 or 21-0996.
* The MSC does not need to send the request for application letter if/when the previously denied condition is not listed on the 21-526EZ, or the participant has already submitted the 21-0995/6 for the condition.
* An MSC can accept a VA Form 21-0995/6 from the participant, but should take no action on the claim, except to ensure the application is sent to the scanning vendor.
* MSCs do not place supplemental claims under EP control.
* Further information can be found in the document, [Implications of AMA in IDES](https://vbaw.vba.va.gov/VBADOD/docs/IDES/AMAImplicationsinIDESv3.pdf)

**Failure to Report for SHA Exam**

[M21-1, III, i.2.D.7.k](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) describes the actions an MSC must take when an IDES participant fails to report for VA examinations; specifically, the reference stipulates that when a participant fails to report for examinations related to referred conditions, the examinations must be rescheduled. However, if the participant misses exams for claimed conditions without good cause, the claim can move forward.

Although the SHA examination is not specifically discussed in [M21-1, III, i.2.D.7.k](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), the same principles apply—the question of whether referred conditions have been examined remains the key consideration.

If the SHA appointment is missed without good cause, and any referred condition was to be evaluated as part of the SHA exam, the SHA must be rescheduled. However, if all referred conditions had been evaluated as part of specialist examinations, the SHA does not need to be rescheduled.

Current IDES 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 (ADC) as of June 4, 2019.

|  |  |
| --- | --- |
|  **June 2019** | **ADC** |
| **Claim Dev (AD/NAD)**  | **5/19** |
| **Exams to PEBLO** | **4** |
| **Medical Stage** | **44** |
| **Proposed Ratings (AD/NAD)** | **39/44** |
| **Recon Ratings** | **17** |
| **Exit Interviews** | **9** |
| **Final Ratings (AD)** | **33** |

 **Source:** VTA Completed Reports July ##, 2019 (9am ET)

**Servicemembers not Filing a VA Claim and use of VA Form 21-526EZ**

MSCs are reminded of [M21-1, III, i.2.D.4.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) (step 5), which describes how MSCs should handle situations in which IDES participants decline to file a claim VA. In these situations, MSCs must ensure that the participant’s decision is appropriately documented. MSCs must encourage the participant to complete a 21-4138 indicating their decision not to file; if the participant declines/refuses to complete a 21-4138, the MSC should document the discussion/decision on a VA Form 27-0820. No VA Form 21-526EZ should be provided/completed if the participant declines to file a VA claim.

**STR Certification from PEBLO**

MSCs and DRAS’ are reminded that the certification of the STRs is now under Section III (Statement of Complete and Current STR, blocks 20-22) of the 21-0819. The previous stand-alone Certification Memo is no longer used/required.

VTA Reminders

### Number of Claimed Conditions Data Field in VTA

VTA v.2.4.3, which was released on June 9, 2019, removed the Total Claimed Conditions and Total Referred/Claimed Conditions data fields from the MSC Tab, and added the Number of Claimed Conditions. The definition is: If the participant submitted a VA claim, enter the total number of conditions claimed for VA purposes (to include those referred by the Service); if the participant declined to file a VA claim, enter 0. Ensure you are filling this field in correctly.

### VTA Access

### The move from the Veterans Information Portal (VIP) to AccessVA in order to access VTA is scheduled for July 22, 2019. An email will be sent from OFO when the date is official. Other than going through AccessVA, the procedure is the same (PIV and PIN). New instructions were provided via an email from OFO and are also posted on VTA (Knowledge Center Folder 5). The AccessVA address is https://vta.va.gov.

### SHA and Other Exam Fields

#### We continue to see cases where the following fields are being populated incorrectly. The fields and their definitions are below. If you need to ensure the data you are inputting is correct, hover over the question mark next to the data field name.

**SHA Provider:** Select the provider that is conducting the SHA and all other exams if being conducted by SHA provider.

**SHA Exam Requested Start Date:** Date MSC enters request for SHA and request for all other exams if being conducted by SHA provider. This date will auto-populate the Med Eval Start Date in new cases.

**SHA Returned Date:** Enter date last exam is received from SHA provider.

Other Provider: Only use this field if the SHA provider is not performing all exams. Select provider conducting other exams.

**Other Provider Exam Site:** Only use this field if the SHA provider is not performing all exams. Select location of the provider conducting other exams.

**Other Exam Requested Date:** Only use this field if the SHA provider is not performing all exams. Enter other exams requested date.

**Other Exam Returned Date:** Only use this field if the SHA provider is not performing all exams. Enter date last exam is received from other provider.

Note: The same provider should not be in SHA Provider and Other Provider data fields.

**Exam End Date:** Date the provider(s) released ALL exams (SHA/GM/Specialty) and the complete medical evaluation report(s).

**Medical Evaluation End Date:** Date complete medical evaluation report is delivered or made available to PEBLO.

Note: The Medical Evaluation End Date should not be after the NARSUM Date.

It is the MSCs responsibility to ensure the exams are complete before providing to the PEBLO. Once exams are provided to the PEBLO, the Other Exam Fields should not be used to order additional exams, even if the DRAS determines exams are insufficient (the DRAS will order the exams, and the MSC will not update exam fields with the DRAS exams), a NARSUM Date has been entered and/or the MTF requests additional exams. Contact the IDES Mailbox with questions or if you need clarification on the use of these data fields.

**IDES Summit at Providence DRAS**

Compensation Service IDES Program Office and Providence DRAS will be hosting an IDES Summit the week of August 12th. The Seattle DRAS, Medical Disability Exam Program Office (contract exams), VHA, DoD and Coast Guard will be in attendance. The intent for this IDES Summit is to discuss and improve the program’s processes and policy. If you have a question for any of the attending stakeholders, please submit them to the IDES Mailbox by COB Wednesday, July 31, 2019.

Please follow the format below when submitting your question to ensure they are captured. The email “Subject” line must state “IDES Summit- MSC Question” and provide the specific question on the body of the email.



BDD Specific Topics

**BDD Claims received via Centralized Mail**

Regional Offices and intake sites are reminded to establish all BDD claims received at their locations prior to sending them to the scanning vendor. BDD claims should only be shipped using the Veterans Claims Intake Program (VCIP) process and should not be included in Centralized Mail shipping. (See [VCIP Shipping Standard Operating Procedure SOP](http://vbacodmoint1.vba.va.gov/bl/21/Transformation/docs/VCIP%20Shipping%20SOP.docx) for further guidance).

If a BDD claim from another RO is received via the CM portal, the claim should be established using the appropriate intake site/RO and brokered back to the Station of Origination (SOO) for development. It is important to select the appropriate intake site/location, so the SOO remains accurate. If your intake site is not present in VBMS, please send an email to the Pre-Discharge mailbox.

Current BDD 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 July 4, 2019.

|  |  |
| --- | --- |
| **July 5, 2019** | **BDD** |
| **Completed FYTD** | **24,034** |
| **Receipts FYTD** | **28,152** |
| **Pending** | **5,525** |
| **# Completed w/in 30 Days of Discharge** | **11,694** |
| **% Completed w/in 30 Days of Discharge** | **41.5%** |
| **Average Days Pending** | **67.5** |
| **Avg. Days to Complete FYTD** | **56.5** |

**Source:** Tableau BDD History Report and PA&I Daily Snapshot, July 4, 2019

### From the Pre-Discharge BDD Mailbox

**Question:** A recent BDD participant received their decision after being discharged and noticed one of the conditions mentioned on the examination was not claimed on the application. The rating decision did not address the condition nor solicit a claim for the condition; however, the now Veteran would like the condition to be addressed. Does the Veteran need to officially file a claim for the condition or can the claim simply be returned to the rating board for possible service connection?

**Answer:** The Veteran should file a claim for the specific condition on VA Form 21-526ez. If filed within one year of discharge and service connection is established, the effective date will be the day after discharge.

Open Floor

Next Teleconferences

**There will be no call in August.**

The next BDD/IDES Call is scheduled for Tuesday, September 10, 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, August 29, 2019.

The next BDD/IDES Coaches Call is scheduled for Thursday, September 12, 2019 at 2PM ET.