

Monthly Benefits Delivery at Discharge (BDD) and
Integrated Disability Evaluation System (IDES) Conference Call Notes
Compensation Service
BDD/IDES/Mil Pay Staff (212A)
November 12, 2019—2 PM ET

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](#).

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 4533673 has been created to provide training credit for the November 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.

Call-in Information and New Guidance

The IM/Chat session will be disabled during the call. Ask questions over the phone during the call or send an email to the appropriate staff corporate mailbox.

When presenter mutes the audience for questions follow the guidance below to unmute:

1. If you are dialed in through your computer (select Use Skype for Business when signing into Skype), you must find your name in the attendee list and unmute yourself by right clicking the microphone.
2. If you are dialed in through a phone (select “Call me at” or “Don’t Join Audio” when signing into Skype), unmute yourself using *6.
3. Do not unmute yourself if you do not need to speak.

Topics for Discussion

BDD and IDES Intranet Sites

There is a lot of good information on the two [Pre-Discharge](#) and [IDES Intranet sites](#), and we ask you to look at them, especially if you have a question about a BDD or IDES topic. The information on these sites might



answer your question(s) and an email to the [IDES mailbox](#) or the [Pre-Discharge mailbox](#) might not be needed. However, we are always here to assist with questions, issues, etc.

Exam and other VBMS Issues

The BDD and IDES Staffs are not the primary point of contact (POC) for exam/EMS and other VBMS issues. Exam/EMS issues/inquiries should follow the instructions in the next topic. For other VBMS issues, a help ticket should be submitted using the YourIT web site or calling the NSD. You can then provide the help ticket #(s) with details to the appropriate staff which will provide us visibility of the issue(s) and will allow us to follow up if needed.

Exam Management System (EMS) IDES/BDD Exam Requests Issues

Below are the steps from the Contract Examination staff to assist with “stuck” IDES/BDD exam scheduling requests (ESR) in VBMS EMS. You can also find this information on the [IDES Intranet site](#) under “What’s New” entitled “[Stuck ESRs in VBMS Exam Management System](#)”.

- Ensure that the ESR is stuck and follow the [VBMS EMS Defect Resolution Job Aid](#) to resolve the issue (this document is also located in the [Medical Disability Examination Home Page/VBMS EMS Information tab](#))
- Submit an IT help desk ticket for the exam request issue
- Email the Contract Examination mailbox at ContractExam.VBAVACO@va.gov with the following information:
 - Social Security number and name of Servicemember/Veteran
 - Details of the incident to include steps taken from the [VBMS EMS Defect Resolution Job Aid](#) to resolve the issue
 - Provide the IT help desk ticket number and amount of time it has been opened

The Contract Examination staff will review the inquiry and provide a response on how to proceed with the ESR. Please keep in mind that each stage of the ESR process has a certain timeliness component and that must be taken into consideration.

Question: The ERRA tool shows to send the exams to VHA. However, when I request the exams in CAPRI, it shows the VAMC is not able to conduct the exams that I need to request, what should I do?

Answer: Send a screenshot of the ERRA results and a screenshot of CAPRI showing the unavailable exams that you need to request to the [IDES mailbox](#) and the [Pre-Discharge mailbox](#).

Question: We received an e-mail to stop using CAPRI, is this correct?

Answer: There has been no communication to stop using CAPRI. Forward this e-mail and your question to the [IDES mailbox](#) and the [Pre-Discharge mailbox](#).



Updating/Verifying Service Information in VBMS

MSCs are reminded of the need to ensure that VA systems are updated to reflect accurate and complete service information. This includes:

- The current EOD and branch of all AD participants
- All previous periods of AD service

Further, MSCs are responsible for verifying all previous periods of service. This action is particularly important in IDES cases involving members of the National Guard or Reserve. Procedures for verifying service information are outlined in M21-1 III.ii.6.B.2.a. Veterans Information Solutions (VIS) typically appears to be the most effective means to obtain verification of previous periods of service. MSCs who do not currently have access to VIS should coordinate with their supervisor to request access.

Note: VBMS CORE has been recently updated to allow Service information to be entered/updated in VBMS (on the Military Service tab under Veteran). This functionality eliminates the need to update service periods in multiple systems (i.e. BIRLS and Participant Profile); MSCs should now enter/update service information directly into VBMS. M21-1 III.i.2.D.3.d. and the MSC Quality Checklist are now being updated to remove references to adding service information in Participant Profile.

Question: VBMS Core includes the “Theater of Service” under the Veteran tab. Do we also need to update this field?

Answer: If the theater of service information is available, then it should be entered into VBMS. It is not necessary to develop for this information if it is not available.

Question: I have a claim/referral with a period of service that I can’t verify through VIS or DPRIS, what should I do?

Answer: Contact the Servicemember/Veteran for a copy of their DD Form 214 for that period of service that shows the dates and character of service. Be sure to also follow the guidance in [M21-1 III.ii.6.B.3.a](#) and [M21-1 III.ii.6.B.3.c](#), and if you still cannot verify service with any of the above means, then see the guidance in [M21-1 III.ii.6.B.3.e](#).

IDES Specific Topics

Examination Results Transfer—Disruption and Workarounds

All completed DBQs are expected to be automatically transferred to the VBMS eFolder; however, recent defects have been identified which have intermittently disrupted this transfer. These defects are now being analyzed and addressed; until the defects are fully resolved, MSCs must make efforts to minimize delays to the IDES process by utilizing the workarounds described below.

When contract exam results fail to transfer to the VBMS eFolder, the results should be available via the vendor portal. When the exam results are retrieved from the vendor portal, the MSC must upload the exams to the VBMS eFolder before closing out the exam tracked items and brokering the case to DRAS.



When VHA exam results fail to transfer to the VBMS eFolder, the results should be available on the Legacy Content Manager (LCM) tab in VBMS. The LCM tab is considered a system of record, and therefore, it is not necessary for MSCs to move examination results from the LCM tab to the VBMS eFolder. However, in these instances, MSCs should add a note in VBMS explaining that the exam results are located on the LCM tab. This note should be added before closing out the tracked items and brokering the claim to DRAS.

Finally, in cases in which exam transfer to the VBMS eFolder fails, it should be assumed that the transfer to HAIMS was also unsuccessful. In these instances, the MSC must take action to ensure that the results are made available to the PEBLO, before entering the *Medical Evaluation End Date* in VTA.

Parallel Processing Proof of Concept

Beginning November 1, 2019, Seattle and Providence DRAS' will execute a Proof of Concept (PoC) exercise designed to evaluate the effectiveness of the following IDES rating process changes:

- Initiating rating activity immediately upon exam completion
- Returning partial ratings to the PEB (when claimed issues must be deferred for further development)

Process changes associated with the PoC are limited to the IDES *rating* activity and are expected to have no impact on the MSC process or requirements except the change to brokering process discussed immediately below.

Brokering Cases to DRAS

M21-1 III.i.2.D.7.d. currently requires MSCs to broker cases to DRAS once all development actions are complete. However, to accommodate the rating process changes described above, it is now critical that MSCs broker cases to DRAS *immediately* upon determining that all the examinations are complete—even if other development remains unresolved and tracked items remain open.

Important: MSCs must have the *Intake Analyst Role* associated with their VBMS User Profile to complete the brokering action.

MSCs must continue to make every effort to resolve open development items throughout the claims development and medical evaluation stages, taking any necessary follow-up actions as needed. However, if a request for evidence is pending after all exams are complete, the case must be brokered to DRAS and the tracked item left open.

Further, MSCs should now broker the case to the DRAS *before* entering the Medical Evaluation (ME) End Date in VTA. This will ensure the DRAS is immediately able to begin work on the proposed rating once the MSC enters the ME End Date.

In summary, MSCs must ensure post-exam action is completed in the following sequence:

1. Verify that all examinations have been complete.
2. Ensure that all examination results are in the VBMS eFolder.
3. Close out examination tracked items (and any others in which the development has been resolved).
4. Broker the case to the DRAS.



5. Enter the *Medical Evaluation End Date* in VTA.

Note: If the PEBLO is unable to obtain examination results via HAIMS, the MSC must update the ME End Date to reflect the date the complete exam results were provided to the PEBLO.

If the MSC receives the requested evidence after the case has been brokered, they must ensure that it is sent to scanning or otherwise uploaded into the eFolder with notes in VBMS documenting receipt of the evidence and the MSC action. If the evidence has not yet been received at the expiration of the tracked items suspense, DRAS will be responsible for further follow ups (if required).

M21-1 III.i.2.D.7.k will be updated to indicate the process above.

Requirement for LOD Determination with NAD IDES Referrals

During the October Teleconference it was indicated that LODs (LOD=yes) were required in all NAD IDES referrals as a condition of a complete referral. This requirement is intended to ensure that all referred conditions have some basis for service connection.

As an alternative to a formal LOD determination, a PEBLO may provide a *Memorandum in Lieu of LOD*. MSCs will accept NAD referrals that include this memorandum provided that the memo establishes the referred conditions were incurred during a period of active duty service and facts stated in the memo are congruent with the evidence in the STRs.

The requirement for LODs is applicable only to participants who are not currently serving on active duty (AD). No LoD is required in Reserve Component (RC) cases if the participant is currently serving on AD (including AD for Initial Entry Training and Advanced Individual Training).

VSO Review of IDES Ratings

M21-1 I.3.B.3.a and b. describe a process to allow VSOs to VA rating decisions before they are promulgated. In IDES claims, VSOs are afforded this review at the time of the final VA rating. The process described in M21-1 I.3.B.3.a and b are not applicable to IDES proposed ratings.

M21-1 II.E.3.m stipulates that VA will not provide an IDES proposed rating to a participant's power of attorney. Although VSOs now have access to their clients VBMS eFolder and may come to see completed proposed ratings in this manner, this should not be conflated with the formal process described in M21-1 I.3.B.3.a and b.

Proposed IDES ratings should not be delayed for VSO review, and DRAS review/reconsideration of completed proposed ratings need to be completed only in the instances prescribed by IDES program procedures. Final IDES ratings are subject to all standard VA rules and requirements including the formal VSO review.

Disenrollment of Decline to File Cases

When IDES participants decline to file VA claims, DRAS must update the Decline to File Letter Date in VTA to reflect the date the Decline to File Letter is prepared. DRAS should complete this update at the time of the proposed rating and the letter should be provided to the PEB along with the proposed rating. Under these circumstances, the DRAS must not request research for disenrollment of the claim in VTA. These cases must remain enrolled in VTA so that the duration of the IDES process can be tracked. If the Decline to File Letter



Date is present at the time of the participant's discharge, the case will be disenrolled from VTA as part of standard VTA disenrollment procedures—no request from the DRAS is necessary.

However, if the DRAS failed to properly enter the *Decline to File Letter Date* at the time of the proposed rating, the case will not be automatically disenrolled at the time of the participant's discharge and will erroneously appear on the pending final benefits reports in VTA. In these cases, the DRAS will need to enter the Decline to File Letter Date in VTA, and then submit a request for research for disenrollment so that the VTA support Group knows that the case should be disenrolled from VTA without a VA Benefits Dates.

Important: DRAS must not submit the request for research/disenrollment after entering the Decline to File Letter Date unless the participant has already been discharged and the case appears on the Pending Final Rating Report.

Question: If we provide the Servicemember a VA Form 21-526EZ, should we consider this declining to file a VA claims if they do not return the completed form?

Answer: Generally, only participants who specifically state that they do not wish to file a VA claim should be considered as declined to file (this statement should be documented for the record). Participants who fail to return a VA Form 21-526EZ to the MSC at the initial interview (or within five days) should not necessarily be considered as declining to file. However, if no VA claim has been received by the time of the proposed rating, the DRAS should handle the claim as if the participant declined to file a VA claim.

Question: An examination provider wants to complete a DBQ for each condition found on the SHA instead of just the referred and claimed conditions, is this correct?

Answer: The SHA exam requires examiners to complete any additional DBQs necessary to evaluate all conditions found during the SHA exam.

Question: If the Servicemember declines to file a VA claim, does the Servicemember still receive a SHA exam?

Answer: Yes, a SHA is required for all IDES participants.

Holiday Leave and Servicemember Availability during the Claims Development and Examination Phases

As we approach the holidays, MSCs are reminded to inquire about approved leave (non-emergency) during the initial interview that could interfere with the IDES process. If the participant indicates he or she has approved leave that would prevent the timely completion of exams, the MSC should return the referral to the PEBLO as an improper referral and remove the PCS Date. MSCs should confirm with the PEBLO that they are aware of the upcoming leave and see if something can be worked out (ex: SM will attend exams while on leave, etc.). Do not accept a case or submit exam requests if you know the participant will not be available to report for exams.



Please note: DoD policy allows commanders to grant leave to IDES participants for the welfare or morale of the Servicemember (SM), provided that the leave does not prevent timely completion of IDES appointments. Approved holiday leave does not necessarily constitute an improper referral; however, leave occurring within the first days of the referral, and/or periods of leave lasting over two weeks, are likely to prevent the timely completion of IDES appointments, and should be returned to the PEBLO.

Note: Deferment should not be used by PEBLOs as a reason for cases where the SM is going on leave. If you hear of this being done, contact the [IDES Mailbox](#).

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) for October 2019.

| October 2019 | IDES (AD/NAD) |
|-------------------------|----------------------|
| Claim Dev | 6/10 |
| Medical Stage | 40/41 |
| Proposed Ratings | 21/34 |
| Recon Ratings | 12/16 |
| Exit Interviews | 7/5 |
| Final Ratings | 24/na |

Source: VTA Completed Reports November 1, 2019 (8am ET)

VTA Reminders

VTA Training

VTA is the system of record for IDES cases, and MSCs should be very efficient and knowledgeable in using VTA. If there are MSCs, MSCs/Coaches and/or other users that are uncomfortable or have questions with VTA inputs/reports, please contact the [IDES Mailbox](#) and we can schedule a training session. We continue to see too many VTA errors.

VTA Pending Reports

Coaches and/or MSCs should be running MSC Pending Reports at least twice a week, if not daily. If you do not run them all, the Pending Claim Development, the Pending Medical Evaluation Stage and Pending Exit Interview reports should be the three you do run. The Pending Claim Development Report should be run with no filters, exported to Excel and filtered by the MTFs your RO supports.

Number of Claimed Conditions on MSC Tab

MSCs are reminded about the policy/guidance in reference to this data field (see the data field definition if needed). We continue to see improper entries which cause case delays at the DRAS'. If the SM is not filing a VA Claim (filing for DoD purposes only), the number in this field should be a zero (0), not blank (no 526 = 0). If



the SM is filing a VA claim and there is a VAF 21-526 submitted, this data field will equal the number of referred and claimed conditions on the VAF 21-526. We are seeing cases where the MSC adds a note saying, “SM declines to file for VA comp”, but the Number of Claimed Conditions has a # greater than 0 (this is not correct).

DRAS Confirmation of Number of Claimed Conditions

In June 2019, VTA release V 2.4.3 changed the “Number of Claimed Conditions” field in VTA on the MSC TAB. On the RO/Rating Activity tab, a new popup appears when the “Number of Claimed Conditions” is set to “0”, and the DRAS enters a Proposed Rating Start Date or a Proposed Rating End Date. The popup asks the DRAS to confirm the Servicemember’s decision to not file a VA claim.

DRAS personnel are reminded of the importance of making sure the data entered in these fields is correct. Compensation Service receives inquiries from the DoD staff regarding the accuracy of this data.

VTA Notes

MSC and DRAS users are reminded of the importance of VTA notes. Notes should be used to ensure the integrity of the claims process and document both development efforts, delays preventing development, and the receipt or non-receipt of evidence from claimants and third-party providers. Notes in VTA are critical, especially in cases that have issues or delays preventing completion. In addition, known delays in the medical examination process should be documented whenever possible.

Timely Entry of Medical Evaluation End Date

MSCs are reminded of the importance of timely entry of the Medical Evaluation End Date (ME). If the PEBLO is obtaining the results themselves via HAIMS or JLV, the ME End serves as the PEBLOs notice the exams are available. If PEBLO is not able to obtain exam results via HAIMS, then the MSC must provide the PEBLO with the complete results, then the act of providing them serves as notice, and the MSC should always update the ME End Date to reflect the date the results were provided. Compensation Service receives inquiries from the DoD staff regarding the accuracy of this data.

BDD Specific Topics

ERRA and Exam Routing

BDD claims processors are reminded to follow the guidance in [M21-1 III.iv.3.A.2.c, Interpreting the ERRA Tool's Results](#), regarding where to request exams, which is also included below. BDD claims exam requests will not be split between VHA (CAPRI) and exam contractor providers (EMS).

III.iv.3.A.2.c. Interpreting the ERRA Tool's Results Use the table below to interpret the [ERRA tool](#)'s results and determine the appropriate examination facility to which an examination request should be routed.



| If ... | Then route the examination request to the identified ... |
|---|--|
| <ul style="list-style-type: none"> the ERRA tool's results direct, <i>Please route examination requests to the appropriate VA facility</i> the ERRA tool recommends sending all DBQs required to adjudicate the claim to VA the claim involves one or more of the contract examination exclusions referenced in M21-1, Part III, Subpart iv, 3.A.1.j, or the Veteran has expressed a preference that his/her examination be conducted at a VHA facility | VHA facility. |
| <ul style="list-style-type: none"> the claim does not involve one or more of the contract examination exclusions referenced in M21-1, Part III, Subpart iv, 3.A.1.j, and the ERRA tool recommends sending at least one required DBQ to <i>Vendor</i> | contract examination vendor. |

BDD YouTube Video

The BDD team has developed a [BDD promotional YouTube video](#) that details the BDD program requirements and benefits of participating in the BDD program. This video has been published on the VBA YouTube channel. Please share this video to promote the BDD program.

BDD Excluded Workload

BDD Claim processors are reminded to follow the requirements in [M21-1, III.i.2.B.3.a](#) when processing BDD Excluded claims. RO's are encouraged to request examinations for BDD Excluded claims; however, qualifying BDD claims should always be the priority when requesting examinations. Coaches and processors should thoroughly review their inventory to be sure all BDD claims are given priority processing.

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 November 5, 2019.

| November 5, 2019 | BDD |
|------------------|-------|
| Completed FYTD | 4,327 |
| Receipts FYTD | 3,013 |



| | |
|--|--------------|
| Pending | 4,988 |
| # Completed w/in 30 Days of Discharge | 2,672 |
| % Completed w/in 30 Days of Discharge | 62% |
| Avg. Days to Complete FYTD | 37.5 |

Source: Tableau BDD History Report and PA&I Daily Snapshot, November 6, 2019

Open Floor

Question: I have sent the VA Form 21-0955 to scanning, do I need to do anything else?

Answer: No. The EP should be established in Caseflow after the form is sent to scanning.

Question: I have a quality review error question, where should I send these questions?

Answer: All quality review questions should be addressed with your local RO Quality Review team and can also be sent to the Compensation Service Quality Review staff mailbox at VAVBAWAS/CO/QRT, QRT.VBACO@va.gov.

Question: The VCIP scanning vendor scanned the VA Form 21-0819 and VA Form 21-526EZ into one document, what should I do to address this scanning error?

Answer: Follow the below VCIP guidance:

- Send the RMN and DCS ID using the [VCIP Issue Tracker](#) in order for VCIP staff to investigate the image error.
- After entering the error in the VCIP Issue Tracker, e-mail the [VCIP mailbox](#) and copy the Operations Center mailbox (OC.vbaco@va.gov). Do not contact the document conversion contractor directly.



Next Teleconferences

The next BDD/IDES Call is scheduled for Tuesday, January 14, 2020 at 2:00 PM EST. 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 close of business (COB), Friday December 27, 2019. A new invite will be sent.

The last BDD/IDES Coaches Call was completed on November 14, 2019.

There was no BDD/IDES Coaches call in December.

The next BDD/IDES Coaches Call is scheduled for March 2020. Invite and exact date will be sent as soon as possible.

