Monthly Benefits Delivery at Discharge (BDD) and

Integrated Disability Evaluation System (IDES) Conference Call Read Ahead

Compensation Service

BDD/IDES/Mil Pay Staff (212A)

June 9, 2020 — 2 PM ET

The Compensation Service BDD/IDES/Mil Pay Staff hosts this call to announce updates and address issues and questions related to the BDD/IDES Programs. All Military Services Coordinators (MSCs), Disability Rating Activity Sites (DRAS), Regional Offices and other VA personnel supporting BDD/IDES are invited to participate.

This read-ahead is provided to facilitate discussion during the conference call.

**Change to Call Notes:** The Call Notes from the previous month’s call will be an appendix to the current month’s Read Ahead (there is no longer a separate Call Notes document). The Call Notes for the May Call are in Appendix 1 of this Read Ahead. The TMS # for this month’s call will be provided during the call and should be active with-in a week of the call’s completion. A Calendar Blast will notify the field when the TMS # is active.

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 Information and New Guidance**

**Call in info:**

[Join Skype Meeting](https://meet.RTC.VA.GOV/andrew.reese/JDC6LJZ6)

844-358-7954, 844-210-0201 or 844-894-0415. Code is 496808907#.

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 the presenter unmutes the audience for questions, follow the guidance below to unmute yourself:

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.

COVID-19 Topics for Discussion

**COVID-19**

This is a very difficult time, things are very fluid, and some changes/decisions are happening as we speak. We appreciate your patience, flexibility and support during these trying times. Contact the [BDD Mailbox](mailto:VAVBAWAS/CO/PREDISCHARGE%20%3cPredischarge.VBACO@va.gov%3e) or [IDES Mailbox](mailto:VAVBAWAS/CO/IDES%20%3cIDES.VBACO@VA.GOV%3e) as needed.

**Correct Form Usage and Ordering Exams**

It has come to our attention from Quality Review that some MSCs are using VA Form 27-0820 as a claim form in lieu of a VA Form 21-526EZ, and ordering the exams off this form. The 27-0820 is not a prescribed VA application for benefits and does not represent a VA claim, and as such MSCs must not proceed to request examinations on the basis of a 27-0820. There is no COVID-19 exception to this policy.

Per [M21-1 III.i.2.D.4.g](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) MSCs must wait until the completed VA Form 21-526EZ is received or until the five-day deadline passes (whichever is earlier) before requesting examinations. If extenuating circumstances exist that impact the participant’s ability to return the form, the MSC may defer requesting exams beyond the five-day deadline. COVID-19 is an extenuating circumstance.

We understand timeliness may be impacted, however, ordering exams will not take place until the VA Form 21-526EZ is received. Make notes as needed to explain delays.

**Force Majeure (FM) Clarification Requests (CRs) in IDES**

The [Guidance for Utilizing “Force Majeure” Process during outbreaks of Contagious Diseases](https://vbaw.vba.va.gov/bl/21/Field%20Guidance%20Related%20to%20COVID19.pdf) does NOT apply to IDES cases. However, per the Contract Exam management staff vendors will send FM CRs in IDES cases. The FM CR will serve as an indicator that no action can be taken by the vendor until face to face exams resume, but the MSC is **not** required to enter the FM special issue in IDES cases.

**VBA Contract Vendors Resume Face to Face Examinations at Select Locations**

There was a [press release](https://www.va.gov/opa/pressrel/pressrelease.cfm?id=5458) regarding VA resuming in-person examinations in select locations that was sent out Friday, May 29, 2020. This process will include IDES/BDD in-person exams with VBA contractors for the MTFs aligned with the select locations on the press release. The appointments resumed June 8, 2020 for the mentioned locations. MSCs should continue scheduling all IDES/BDD exams through EMS. Once additional locations are added, we will ensure the information is distributed to the field.

General Topics for Discussion

Updated Guidance for Requesting and Handling IDES/BDD Examinations

Additional guidance regarding IDES/BDD Exams (including information on handling SHA DBQs that were completed via telehealth technology) is currently under review by Compensation Service leadership and will be distributed upon leadership approval. In the interim, MSCs are reminded that all IDES/BDD exam requests must be submitted to contract vendors—IDES/BDD exams must not be requested from any VHA location at this time. Further, in IDES cases, the *Medical Evaluation End Date* in VTA must not be entered until examinations for all issues (claimed and referred) are completed and all required DBQs have returned.

IDES Specific Topics

**Date of Claim (DOC) for Rating EP in NAD IDES Cases**

When establishing rating end products in IDES claims for participants who are not on active duty (NAD) [M21-1 III.i.2.F.2.d](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)) currently indicates that the DRAS must use the date VA received the request for a rating decision from the PEB as the date of claim. However, due to processing changes associated with Parallel Processing (PP), DRAS may now take action to prepare these ratings in advance of the PEB’s request.

Effective immediately, in any NAD IDES case in which the DRAS initiates rating activity prior to the PEBs request, the DRAS must use the following as the DOC:

• The Case File/Exam Review Start Date in VTA (in any case with Case File/Exam Review Start Dates on or after 5/20/2020), or

• 5/19/2020 (in any case with Case File/Exam Review Start Dates on or before 5/19/2020) Rationale: 5/19/2020 was the date these cases first appeared on the Pending Rating Preparation Report in VTA.

Note: In any NAD cases in which rating activity is initiated after the PEB’s request, the DOC must continue to reflect the date of the PEB’s request as described in [M21-1 III.i.2.F.2.d.](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))

Reminder: When proposed ratings are prepared in advance of the PEB’s request in active duty IDES cases, DRAS must clear an EP 310 IDES Proposed Rating using the current date as the DOC in accordance with the Parallel Processing POC Playbook.

The M21-1 is now being updated to incorporate all procedural changes associated with PP to guidance above along with procedure shown in the POC playbook. Until those changes are published, DRAS must process all PP cases in accordance with the POC playbook, and NAD cases as indicated above.

**Reminder-Timely Update of Medical Evaluation End Date**

MSCs must make every effort to update the *Medical Evaluation End Date* (MEED) in VTA on the same day examination results are provided to the PEBLO. Timely entry of this data point is critically important due to recent DRAS process changes associated with Parallel Processing (PP). PP allows the DRAS to begin rating activity immediately following completion of VA Exams; and in these cases, it is the MSC entry of the MEED that signals to the DRAS that the case has become actionable. When the MEED is not entered on the date that the results are provided to the PEBLO, it reduces the additional time for rating that PP was designed to provide. Compensation Service will continue to monitor the MEED data and will take action to engage management at stations in which MSCs continue to repeatedly back-date the MEED.

All MSCs are asked to review their current work processes and ensure that VTA is being updated on the same day exam results are provided to the PEBLO.

**Virtual Military Services Coordinator (MSC) Training Conference August 2020**

The in-person MSC Training Conference that was scheduled for May 11-15, 2020 and postponed until August 2020, will now be conducted virtually. Compensation Service Staff has started the planning to conduct the training conference virtually and we will advise as soon as additional information becomes available.

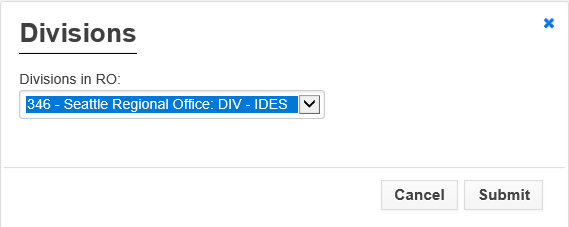
Brokering All IDES Cases Ready For Decision (RFD)

MSCs must broker cases to DRAS prior to updating *Medical Evaluation End Date* in VTA. As a result of recent IDES rating process changes, MSCs must ensure that all IDES cases are made “RFD” prior to brokering the case to DRAS.

***Important*: all** IDES cases must now be placed into RFD status, regardless of duty status.

The above will be incorporated into [M21-1 III.i.2.D](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) in the next update of that section. Please refer to the slides attached to the call for further information.

Note: When brokering cases to Seattle and Providence, ensure you are selecting the updated dropdown choice based on your DRAS. Seattle example is below.



Current IDES Program Timeliness

As outreach specialists and VA’s frontline contact with Service members 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 May 2020.

|  |  |  |
| --- | --- | --- |
| **Stage/Phase** | **IDES Goal (AD/NAD)** | **May 2020 (AD/NAD)** |
| **Claim Dev** | **5/11** | **12/9** |
| **Medical Stage** | **32** | **73/42** |
| **Proposed Ratings** | **20** | **18/26** |
| **Recon Ratings** | **4** | **8/9** |
| **Exit Interviews** | **14** | **7/5** |
| **Final Ratings** | **20/na** | **21/na** |

**Source:** VTA Completed Reports (Days to Complete Including Deferment) June 2, 2020 (8am ET).

**Note:** VA using the goals from the 230-day process.

BDD Specific Topics

**Initial Development by Station of Origination (SOO)**

The M21-1 requires that regional offices (ROs) and intake sites complete initial development on incoming BDD claims. The initial development should be completed under the end product (EP) 336 and changed to the appropriate rating EP after the examinations have been requested and all other development actions have been taken. The future jurisdiction of the EP will be determined by NWQ after the EP 336 is changed to the rating EP. Since BDD claims can be received multiple ways, the following should serve as a reminder of how to handle incoming BDD claims requiring initial development.

If a SM sends a BDD claim directly to Centralized Mail (CM) processing in Janesville, WI, ROs should not broker these claims back to the location in which they reside. ROs should take ownership of the claim as the claim never had a SOO.

If a SM files a claim and the RO sends the BDD claim to CM without claims establishment and development as stated in the M21-1, then the intake analyst should broker the claim immediately back to the SOO for development. There have been reports of ROs brokering the BDD claim back to the SOO after two or three weeks of holding the claim at their RO.

If a claim comes in from eBenefits, SEP, D2D, or another electronic claims submission method, the Regional Office of Jurisdiction (ROJ) is responsible for development of the claim.

**Segmented Lane Assignment in BDD Cases**

[M21-1 III.i.2.A.2.a](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#2c) directs intake sites to assign BDD claims to the *BDD (National)* segmented lane. During the May 2020 BDD and IDES Call, it was erroneously stated that the *BDD (National)* segmented lane is required to be entered for all BDD claims. However, it is no longer necessary to assign BDD claims to the *BDD (National)* lane, and the reference to the *BDD (National)* lane will be removed from [[M21-1 III.i.2.A.2.a](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#2c)](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#3d) in the next update to this section.

The segmented lane entry no longer serves to assist with NWQ routing; however, VBMS still requires an entry in the segmented lane field when established a claim. Until this field is removed from VBMS, MSCs/VSRs may select either *Core (National)* or *BDD (National)* as the segmented lane when establishing BDD claims.

**VCIP Scanning Issues**

During the May 2020 BDD and IDES Call, VCIP scanning issues were reported such as the VA Form 21-526EZ uploaded with the STRs, and the documents were only labeled as, “STRs”. Submit the details of the VCIP scanning issue to the [OBPI-VCIP Issue Tracker](https://vaww.infoshare.va.gov/sites/OBPI/VCIP/SD/OBPI%20Issue%20Tracker/default.aspx) by using the [Scanning Inquiry Request Form](https://vaww.infoshare.va.gov/sites/OBPI/VCIP/SD/OBPI%20Issue%20Tracker/_layouts/15/FormServer.aspx?XsnLocation=https://vaww.infoshare.va.gov/sites/OBPI/VCIP/SD/OBPI%20Issue%20Tracker/Scanning%20Inquiries/Forms/temp.xsn&SaveLocation=https%3A%2F%2Fvaww%2Einfoshare%2Eva%2Egov%2Fsites%2FOBPI%2FVCIP%2FSD%2FOBPI%20Issue%20Tracker%2FScanning%20Inquiries&ClientInstalled=true&DefaultItemOpen=1&Source=https%3A%2F%2Fvaww%2Einfoshare%2Eva%2Egov%2Fsites%2FOBPI%2FVCIP%2FSD%2FOBPI%2520Issue%2520Tracker%2FPages%2FOBPI%2DVCIP%2DIssue%2DTracker%2Easpx)​ in the [OBPI-VCIP Issue Tracker](https://vaww.infoshare.va.gov/sites/OBPI/VCIP/SD/OBPI%20Issue%20Tracker/default.aspx). For further VCIP Issue Tracker guidance, see the [VCI Issue Tracker Orientation v1 060214](https://vaww.infoshare.va.gov/sites/OBPI/VCIP/SD/OBPI%20Issue%20Tracker/Training%20Material/VCI%20Issue%20Tracker%20Orientation%20v1%20060214.pdf).

We have been informed that the scanning vendor does not separate documents that come into the scanning facility. If other forms (526EZ, DD-214, 686c, etc.) are inside of an STR folder, these forms will be uploaded as STRs and not separately labeled. The STRs sent to scanning should be reviewed to ensure no documents other than STRs are in the STR folder.

**Uploading Documents Received Electronically**

While the preferred method to receive BDD claims electronically from SMs is eBenefits or through SEP or D2D from the VSOs, if the MSC is not allowed in the intake site due to the COVID-19 pandemic, MSCs may accept BDD claims through e-mail or [SAFE](https://safe.apps.mil/). You may either upload a copy of the e-mail that included the claims documents or you can add an annotation in Adobe Pro that meets the requirements of [M21-1 III.i.2.B.1.c](https://vaww.vrm.km.va.gov/system/templates/selfservice/va_kanew/help/agent/locale/en-US/portal/554400000001034/content/554400000014101/M21-1-Part-III-Subpart-i-Chapter-2-Section-B-Division-of-Responsibilities-for-Processing-Benefits-Delivery-at-Discharge-BDD-and-BDD-Excluded-Claims#2) which must include:

* your initials
* your title
* the date of receipt, and
* the location where the claim was received.

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 June 2, 2020.

|  |  |  |
| --- | --- | --- |
| **Data Points** | **Goal** | **June 2, 2020** |
| **Completed FYTD** |  | **20,602** |
| **Receipts FYTD** |  | **20,824** |
| **Pending** |  | **4,466** |
| **# Completed w/in 30 Days of Discharge** |  | **13,027** |
| **% Completed w/in 30 Days of Discharge** | **100%** | **63.2** |
| **Avg. Days to Complete FYTD** | **30** | **42** |

**Source:** Tableau BDD History Report, June 3, 2020

Upcoming Teleconferences

The next BDD/IDES Call is scheduled for Tuesday, July 14, 2020, at 2PM ET. Please submit IDES questions and proposed topics for discussion to the [IDES Mailbox](mailto:VAVBAWAS/CO/IDES%20%3cIDES.VBACO@VA.GOV%3e), and BDD questions and proposed topics for discussion to the [BDD Mailbox](mailto:VAVBAWAS/CO/PREDISCHARGE%20%3cPredischarge.VBACO@va.gov%3e) no later than close of business (COB), Wednesday July 1, 2020.

The next BDD/IDES Coaches Call is scheduled for September 3, 2020. Please submit IDES questions and proposed topics for discussion to the [IDES Mailbox](mailto:VAVBAWAS/CO/IDES%20%3cIDES.VBACO@VA.GOV%3e), and BDD questions and proposed topics for discussion to the [BDD Mailbox](mailto:VAVBAWAS/CO/PREDISCHARGE%20%3cPredischarge.VBACO@va.gov%3e) no later than COB, Monday August 17, 2020.

Open Floor

**Appendix 1:** **Call Notes from the May 2020 Comp Service BDD/IDES Conference Call**

The following notes provide a summary of questions and discussion from the May BDD/IDES Conference Call. For a complete description of the topics discussed on the call please review the [May Read Ahead](https://vbaw.vba.va.gov/vbadod/IDES.asp).

**Issues with VA Forms**

The Forms Staff has reported that the issue with the VA Form 526EZ has been corrected. MSCs should be able to resume using the latest version.

**Segmented Lane Assignment in BDD Cases**

During the May 2020 BDD and IDES Call, it was erroneously stated that the *BDD (National)* segmented lane is required to be entered for all BDD claims. This was discovered after the call to be incorrect. Please see the correct guidance included above in the June 2020 BDD and IDES call under the topic, “Segmented Lane Assignment in BDD Cases” which states that it is no longer necessary to assign the *BDD (National)* lane to BDD claims. Until the segmented lane is removed as a required field from VBMS, MSCs may select either *Core (National)* or *BDD (National)* as the segmented lane.

**Uploading Documents Received Electronically**

There was a question during the May 2020 BDD and IDES call on what should be entered for the *Content Source*of documents received from a VSO. *Veteran* should be selected as the *Content Source*for documents received from a VSO.