Monthly Benefits Delivery at Discharge (BDD) and

Integrated Disability Evaluation System (IDES)

Conference Call Read Ahead

Compensation Service

BDD/IDES (212A)

October 13, 2020 — 2 PM ET

The Compensation Service BDD/IDES 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.

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). There are no Call Notes for the October Call as the September call was cancelled. 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 Microsoft Teams Meeting](https://teams.microsoft.com/l/meetup-join/19%3Ameeting_MzlhN2FlN2YtYTFhNS00NjExLWEwMzMtYWEwYjE0YzU1Y2Qx%40thread.v2/0?context=%7b%22Tid%22%3a%22e95f1b23-abaf-45ee-821d-b7ab251ab3bf%22%2c%22Oid%22%3a%22a0338b5c-0526-4e13-9809-5d0ecc8cdeb8%22%7d)

+1 872-701-0185   United States, Chicago (Toll)

Conference ID: 448 196 643#

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. Contact the BDD Mailbox or IDES Mailbox as needed.

Phase 3 Exam Resumption by QTC/VES and Other Exam Info

On the July Call we provided information on the three phases of exams.

* Phase 1 – Out-patient C&P examinations can be completed that do not require the removal of PPE
* Phase 2 – Out-patient and in-patient C&P examinations can be completed that do not require the removal of PPE
* Phase 3 – All C&P examinations can be completed, and PPE removed

Most of the country is in Phase 3, however, COVID is fluid and changes may happen quickly based on state and/or local rules.

The most recent list of the Phase 3 locations is on the [IDES Homepage](https://vbaw.vba.va.gov/vbadod/IDES.asp).

<https://benefits.va.gov/compensation/claimexam.asp> can be used to see if exams have resumed in an area. Enter the zip code and it provides a status of that location. Overseas locations are also shown.

Notes:

1. VHA Executive in Charge and USB guidance remains that all BDD/IDES exams are to be ordered through QTC/VES. VHA will not be used, even if you have a pre-COVID local agreement with VHA. Any recent agreements between a RO and a VAMC are not allowed. Any concerns on pending exams or requests for exceptions should be submitted to the IDES Mailbox or BDD Mailbox prior to submitting any exams through VHA.
2. Any pending exam requests that are in CAPRI should be cancelled, to include those from the early days of COVID. If those exams have not been re-ordered through QTC/VES, they should be.
3. Keep your DoD counterparts informed on the latest exam guidance.

General Topics for Discussion

The Monthly BDD/IDES Conference Call

It is important that MSCs attend this monthly call. As mentioned in the introduction, we host this call to announce updates and address issues and questions related to the BDD/IDES Programs. All MSCs and Coaches should be attending. The day and time of the call are the same every month (2nd Tuesday at 2pm ET), so this timeframe should be free from interviews/other work in order for Coaches and MSCs to attend.

BDD and IDES Corporate Email Addresses

MSCs and other VA personnel should not provide the BDD (Predischarge.VBACO@va.gov) and IDES (IDES.VBACO@VA.GOV) email addresses to DoD counter parts. These email addresses are for VA personnel. DoD should be contacting you with any questions/issues, and then you can contact the appropriate box if needed.

Self-assigning a Claim During Claim Establishment (CEST)

Veterans Benefits Management System (VBMS) update 19.1 now allows users to self-assign a claim *during* the CEST process.

This allows users the ability to process claims without having to request that a coach or supervisor assign the claim back to them for development, especially for those claims processors who do not have the role of Intake Analyst in the VBMS. Additionally, this new feature should minimize EP336/689s being left in a station’s main Work Queue due to daily common interruptions that may occur after immediately CESTing a claim.

A new check box has been added at the bottom of the Claim Establishment screen for this purpose:



**FY20 MSC Virtual Training IM Q&A**

The Instant Messaging (IM) questions received during the MSC Virtual Training on August 19th and 20th have been reviewed and answered by the subject matter experts. The Q&A document is posted on our [BDD Homepage](https://vbaw.vba.va.gov/vbadod/predischarge.asp) and [IDES Homepage](https://vbaw.vba.va.gov/vbadod/IDES.asp). If you have any follow-on questions regarding the answers provided, please reach out to either our BDD Mailbox or IDES Mailboxas appropriate.

IDES Specific Topics

**IDES Interviews Implications**
A calendar blast was released to all IDES MSCs and claims processors on September 16, 2020 regarding telephone interviews. When conducting an IDES interview (both initial and exit interview) via telephone or video conference, MSCs must document the telephone interview on a **VA Form 27-0820** and upload into the SMs eFolder. For further information on telephonic initial interviews, please refer to [M21-1 III.i.2.D.4.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?query=ides#4). For further information on telephonic exit interviews refer to [M21-1 III.i.2.E.6.f.](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) If you have any questions, please reach out to theIDES Mailbox.

**Handling Supplemental Claims from Active Duty IDES SMs**

Please see Appendix 3 for updated guidance on handling supplemental claims from active duty IDES SMs. Please note this guidance updates and supersedes all previous guidance on this issue.

**DoD Requesting Exam Clarification**

When MEB providers have questions or find issues with IDES exams conducted by QTC or VES Providers, they should first contact the MSC with their concern. The MSC should forward the MEB concern to the Medical Disability Exam Program Office (MDEPO) through their corporate mailbox at ContractExam.VBAVACO@va.gov. MDEPO Staff will review these requests, determine if corrective action is warranted and respond to the MSC assigned. MDEPO Staff will provide guidance if corrective action is warranted and/or if the MSC or DRAS must enter the rework request in EMS.

Please keep in mind that the exam issues/concerns should be related to an insufficient exam for rating purpose (i.e. incorrect or missing information on the DBQ) not just a preference or change from the MEB providers. Also, exam concerns should be addressed once all the exam results are received not one by one.

If a SM has an issue/complaint about an exam, the SM should bring it up to their PEBLO/MEB, who will follow the above guidance. The SM should not be contacting the contract providers directly with their exam concerns.

**Holiday Leave and SM 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 SM 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 SM will not be available to report for exams.

Notes:

1. DoD policy allows commanders to grant leave to IDES SMs for the welfare or morale of the SM, provided that the leave does not prevent timely completion of IDES appointments.
2. 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.
3. With the delay in exams due to COVID, MSCs should determine if returning the referral is feasible during these times. Example: PCS Date is December 1. SM going on leave December 2-16. With COVID, will exams be scheduled that soon? Per Exam Staff, average time is 30 days for appointments.

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 August 2020.

|  |  |  |
| --- | --- | --- |
| **Stage/Phase** | **IDES Goal (AD/NAD)** | **September 2020 (AD/NAD)** |
| **Claim Dev**  | **5/11** | **12/33** |
| **Medical Stage** | **32** | **124/122** |
| **Proposed Ratings** | **20** | **4/8** |
| **Recon Ratings**  | **4** | **7/6** |
| **Exit Interviews** | **14** | **8/7** |
| **Final Ratings** | **20/na** | **15/na** |

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

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

**VTA Specific Topics**

**Updating VTA Notes**

[M21-1 III.i.2.D.1.h.](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#1)describes VTA as a tool to track IDES participants as they proceed through the process. VTA contains a notes section where users can add comments/updates. It’s critical to keep VTA updated with notes on where cases are in process. Compensation Service often gets inquiries from DOD and other stakeholders on the status of IDES cases. Example: A recent inquiry asked Compensation Service to provide the status of an IDES SM. A review of the case in VTA showed exams were requested in April 2020, there had been no follow up notes since that time. After reviewing VBMS, the MSC noted most exams had been completed, but one exam remained pending. The MSC added this note in VBMS in July and September, however never updated VTA. If MSC would have updated VTA with a note that an exam was still pending, it may have provided DOD an update and prevented the inquiry. Please ensure VTA notes are updated with actions taken to process the claim, especially when delays occur.

Double Entry of Same Exam Provider

#### We continue to see cases where the SHA and other exam fields are being incorrectly populated. The fields and their definitions are below (definition is also at the question mark “?” next to the data field in VTA).

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

**SHA Exam Site:** Location of the Exam 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.

The same provider should not be in SHA Provider and Other Provider sections. Also, once exams are returned and provided to 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.

Note: There may be exceptions to this rule. Contact the IDES Mailbox with questions or if you need clarification on a specific case.

Example 1.

 

Example 2.

MSC missed a contention on the original 9/4 exam request and ordered the exam on 9/11.

This is incorrect. If exams have not been returned, the 9/4 SHA Exam Requested Date covers the exam requested on 9/11.

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**Entry of Exam Results**

MSCs must wait until all exams are completed and returned from the provider(s) before updating the SHA and/or Other Exam Returned Dates. Example: Six exams were ordered through QTC (SHA and five specialties). When an exam (SHA/one specialty) is completed/returned, MSCs will not update the SHA Exam Returned Date. The SHA Exam Returned Date will only be updated when all six exams are returned.

**VTA v.2.3.9**

VTA v.2.4.9 will be released Oct 14 (day after the call). There are several changes/updates on the MSC Tab, updates to some MSC/DRAS Reports and a new DRAS Report (VTA 806 and VTA 813). The complete list of changes/updates is in Appendix 2. Contact Andy or Michelle with any questions on v.2.4.9.

BDD Specific Topics

**Adding the Anticipated Release from Active Duty Date (RAD) for BDD Claims**

Due to the risk of premature authorization, guidance was previously passed to leave the anticipated RAD for BDD claims blank in VBMS. As a result of NWQs distribution rules changing earlier this year, this risk has been significantly reduced. BDD claims in Ready for Decision status are now distributed five days prior to the anticipated RAD versus the previous rule of 45 days. In response to this change, we are rescinding the previous guidance and asking BDD processors to now include the anticipated RAD in VBMS upon claim establishment; however, this date should continue to be verified prior to authorization as stated in [M21-1, III.i.2.B.4.h](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#4h).

**VA.gov, eBenefits, and Stakeholder Enterprise Portal (SEP) File Size Upload Increase**

Based off a suggestion during the MSC Virtual Training in August 2020, the file size upload limit of 25 MB on [VA.gov](https://www.va.gov/disability/how-to-file-claim/), [eBenefits](https://www.ebenefits.va.gov/ebenefits/homepage), and [SEP](https://www.sep.va.gov/sep/web/guest/sep) has been increased to 50 MB effective September 30, 2020. SMs and Veterans may now upload files on [VA.gov](https://www.va.gov/disability/how-to-file-claim/) and [eBenefits](https://www.ebenefits.va.gov/ebenefits/homepage) up to 50 MB for each file. Veterans Service Organizations (VSOs) may also upload files up to 50 MB for each file on [SEP](https://www.sep.va.gov/sep/web/guest/sep). The text on SEP still shows the file size limit is up to 25 MB. However, SEP will allow the VSOs to upload a file up to 50 MB. The text on SEP will be updated to show the file size limit is now 50 MB during the next update to SEP, which is planned for October 14, 2020.

**BDD End Product (EP) Date of Claim (DOC) Issues**

VBMS will not allow the user to update the date of claim (DOC) on a BDD diary EP when the anticipated date of release from active duty (RAD) date is extended into the future. The DOC for all BDD and BDD-Excluded EPs is the first day following the anticipated RAD per [M21-1 III.i.2.A.2.b](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#2b). The only way to update the DOC is to cancel the EP and re-establish (re-CEST) the EP again with the correct DOC. However, once the user cancels the EP with the incorrect DOC, then all development done under that EP is lost including all exam requests and tracked items. A YourIT help ticket has been submitted for this issue. Users should place a note in VBMS to document the DOC discrepancy. All VBMS issues are addressed by submitting a YourIT help ticket.

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 October 6, 2020.

|  |  |  |
| --- | --- | --- |
| **Data Points** | **Goal** | **October 6, 2020** |
| **Completed FYTD** |  | **376** |
| **Receipts FYTD** |  | **415** |
| **Pending** |  | **10,443** |
| **# Completed w/in 30 Days of Discharge** |  | **198** |
| **% Completed w/in 30 Days of Discharge** | **100%** | **52.7%** |
| **Avg. Days to Complete FYTD** | **30** | **53.96** |

**Source:** Tableau BDD History Report, October 7, 2020

Upcoming Teleconferences

The next BDD/IDES Call is scheduled for Tuesday, November 10, 2020, 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 BDD Mailbox no later than close of business (COB), Friday, October 30, 2020.

The next BDD/IDES Coaches Call is scheduled for December 3, 2020. Please submit IDES questions and proposed topics for discussion to the IDES Mailbox, and BDD questions and proposed topics for discussion to the BDD Mailbox no later than COB, Monday November 16, 2020.

Open Floor

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

There was no September Call.

**Appendix 2:** **VTA v.2.4.9 Changes/Updates**

VTA-3: Remove VTA User’s SSNs from the VTA Database

VTA User’s social security numbers are no longer stored in VTA.

VTA-9: 508 Automatic errors

When errors are automatically detected, an error message will now be shown to the user and announced by screen readers. For example, entering a letter into a numeric field will now present the user with an error message stating “An invalid character was entered. Please enter a number and try again.”.

VTA-10: 508 Menu navigation with keyboard

VTA Users will now be able to navigate the main menu and all sub menu options of the application with the keyboard. Pressing ‘enter’ will open and close menus and submenu options. Using the up and down arrow keys will allow the user to move through the menu that is currently open.

VTA-11: 508 Alerting and Date Input formatting

VTA Users who use a screen reader will now be alerted if they receive an error or other type of message on ‘save’ and other application actions. Screen readers will also read the required date format when a user focuses on a date input. Default Alert windows have all been converted to custom dialogs (for accessibility purposes).

VTA-13: Modify recipients of the system generated ‘Case has been Disenrolled’ email

When a Case is disenrolled, the DRAS will no longer receive the resulting system generated email unless ‘Request DoD Research for Possible Disenrollment’ has been checked on the RO/Rating Activity tab. For Cases where research was requested, both the DRAS and the User that checked the box will receive a copy of the email.

VTA-14: VR&E Case Tab/Report Changes

New functionality has been added to VTA for Vocational Rehabilitation and Education Users.

The VR&E tab contains 3 new fields:

• Date Case Assigned to VR&E VRC: “The date the case was assigned to the VR&E VRC”

• VR&E VRC/SM Interview Outcome: “The outcome of the VR&E VRC/SM Interview”

• Result of VR&E/VRC Interview: “Result of the VR&E/VRC Interview”

2 fields have had their display name altered:

• 'VR&E Plan Completed Date' has been renamed to 'VR&E Plan Development Date'

• 'VR&E VRC/SM Interview Date' has been renamed to 'VR&E VRC/SM Interview Outcome Date'

New and altered fields should be reflected on the ‘VR&E VRC SM Interview Pending’ and ‘VR&E VRC SM Interview Completed’ reports as well as UDR and Weekly Extracts.

‘VR&E VRC SM Interview Pending’ report will now show cases with a ‘Date Case Assigned to VR&E VRC’ populated but without a ‘VR&E VRC/SM Interview Outcome Date’ populated. Days pending will now be measured from the ‘Date Case Assigned to VR&E VRC’ field to the current day. ‘VR&E VRC SM Interview Completed’ will now show cases with a ‘Date Case Assigned to VR&E VRC’ populated and a ‘VR&E VRC/SM Interview Outcome Date’ populated. The total days will stop once the VR&E VRC/SM Interview Outcome Date is populated.

VTA-15: Remove references to email address ‘YourIT@va.gov’

Email address ‘yourit@va.gov’ is no longer monitored. Users will now be instructed to either email VTA Support (vrst@vba.va.gov) or call the NSD. These instructions have been modified on the VTA Help Page, system generated emails regarding disabled accounts, and the login page displayed when IAM/AccessVA authentication services are unavailable.

VTA-803: Change all references of ‘Servicemember’ to ‘Service member’

When VTA was originally launched, ‘Service member’ was one word; it has evolved and is now officially two words. All references in VTA have been changed, including reports, emails, and web pages.

VTA-804: RO/Rating Activity Tab-VA Proposed Rating End Date popup

If the ‘VA Proposed Rating End Date’ is populate and a change is made, a pop up will display before the user can Save that states “You are changing the VA Proposed Rating End Date. If a Proposed Rating has already been uploaded into VBMS and the Case File Assembly Start Date on the PEB Tab is populated, this date should not be changed”.

VTA-806: MSC Case Tab/Report Changes

The MSC tab contains 4 new fields:

• MSC/Service member Interview Type: “Type of Interview Conducted with SM”

• VA Form 21-526EZ Outcome: “Status of the VA Form 21-526EZ”

• VA Form 21-526EZ Received: “Was 21-526EZ Received?”

• VA Form 21-526EZ Received Date: “Date 21-526EZ received”

There is new business logic that affects the MSC tab as well:

• ‘MSC/Service member Interview Type’ is now required when the ‘MSC/Service member Interview Date’ is populated.

• ‘SHA Exam Requested Date’ will be locked until ‘VA Form 21-526EZ Outcome’ is populated.

• ‘VA Form 21-526EZ Received Date’ is now required when the ‘VA Form 21-526EZ Received’ is Yes.

The MSC Interview Completes Report, UDR, and the Weekly Extracts have been updated with the 4 new fields.

VTA-809: Initial check of a checkbox will no longer launch the audit entry popup

When a user modifies or deletes data from a Case, an audit popup is displayed, forcing the user to enter a reason for the change. This popup is not shown for the initial entry of data. In the past, the initial check of a checkbox has been triggering the audit popup. With this release, the audit popup will no longer be shown the first time a user checks a checkbox. This change has been made for the following checkboxes: ‘Dual Action Case’, ‘Directed FPEB’, ‘Request DoD Research’, and ‘DD214 in VBMS’.

VTA-812: Update ‘US Army Wounded Warrior Program’ link

The ‘US Army Wounded Warrior Program’ link, found in the ‘Related Links’ section on the VTA Home Page, has been updated.

VTA-813: Create new Rating Preparation Completed Report and update MSC/DRAS reports

‘Case File/Exam Review Start Date’, ‘MSC Admin Time’, and ‘ME Update Time’ have been added to the MSC ‘Medical Evaluation Stage Completes’ operational report. The ‘MSC Admin Time’ will reflect the number of days between the ‘Medical Evaluation End Date’ and the ‘Exam End Date’. The ‘ME Update Time’ will reflect the number of days between the 'Case File/Exam Review Start Date' and the 'ME End Date'.

‘Medical Evaluation End Date and ‘Rating Preparation Time Allowance’ have been added to the DRAS ‘Proposed Completes’ operational report. The ‘Rating Preparation Time Allowance’ will reflect the number of days between the ‘Medical Evaluation End Date’ and the ‘Proposed Rating Request Date’, or the ‘VA Proposed Rating Start Date’ if the ‘Proposed Rating Request Date’ is blank.

A new DRAS operational report ‘Rating Preparation Completed’ has been created. This report will include all cases with a ‘BEL Completed Date’. Several calculated columns will be on this report, including:

• Rating Preparation Time: number of days between the ‘Medical Evaluation End Date’ and ‘BEL Completed Date’

• DRAS Time: number of days between the ‘Case File/Exam Review Start Date’ and ‘BEL Completed Date’

• Decision Time: number of days between the ‘Case File/Exam Review Start Date’ and ‘Proposed Rating Completed On Date’

• BEL Time: number of days between the ‘Proposed Rating Completed On Date’ and ‘BEL Completed Date’

• ME Update Time: number of days between the ‘Medical Evaluation End Date’ and ‘Case File/Exam Review Start Date’

VTA-815: Claim Development Stage warning email

The system generated ‘Claim Development Stage’ email that is sent two days before the maximum number of days in the stage has been modified to reflect the new ‘230 day’ goals. This email will now go out on the third day within the stage. If the Case is not active duty, it will go out on the ninth day of the stage.

**Appendix 3:**

**Updated Guidance for Handling Supplemental Claims from Active Duty IDES SMs**

Previous Compensation Service guidance has indicated that supplemental claims from active duty SMs must be processed outside of the IDES program and according to standard supplemental claim procedure. However, this has shown to be problematic as the standard supplemental claim process does not allow a means for these claims to be decided while the SM is currently serving on active duty, resulting in unactionable EP 040s.

The guidance below updates and supersedes all previous guidance and allows supplemental claim issues to be considered as part of the IDES claim, and within IDES decisions. The requirement for VA Form 20-0995 remains in place, as does the requirement for EP 040. However, supplemental claim issues will now be controlled under the pending EP 689 while the SM is serving on active duty; establishment of the EP 040 will be deferred until the SM is discharged.

***Important:*** the guidance below is **not** applicable to higher level review (HLR) claims (filed on VA Form 20-0996), or to supplemental claims filed by IDES claimants who are not currently serving on active duty. In these scenarios, the standard HLR/supplemental claim processes are not impeded by the claimant’s duty status and as such, these applications must continue to be processed according to standard HLR/supplemental claim policy and procedure.

Continued Requirement for Prescribed Form

As indicated in previous guidance, supplemental claims must be submitted on VA Form 20-0995 to be considered a claim for benefits; this requirement remains unchanged. When previously denied conditions are indicated on a VA Form 21-526EZ, it cannot be considered a claim for benefits; rather, this must be handled as a “request for application” in accordance with [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).

When IDES SMs indicate their intent to claim a previously denied issue during an in-person interview, the MSC must explain the decision review options available (HLR vs. supplemental claim) and associated application requirements. If an IDES SM wishes to pursue a supplemental claim, the MSC must provide a VA 20-0995 for this purpose.

Handling Supplemental Claim Applications from IDES SMs

When a VA Form 20-0995 is received from an active-duty SM with a pending IDES claim, the claims processor who identifies the application must ensure that the issue is listed as a contention under the pending EP 689. The issue will remain controlled under the 689 while the SM remains on active duty (an EP 040 will **not** be established until the SM is discharge as indicated below).

When active duty IDES SMs submit VA Form 20-0995s, the supplemental claim issue(s) must be developed in accordance with standard IDES procedure. The requirement for “potentially new evidence” is satisfied on the basis of the SM’s current period of service and new STRs. When the evidence of record is sufficient to do so, the supplemental claim issue should be addressed in IDES proposed ratings.

Establishing EP 040

After the SM’s discharge from service (when the rating EP is established for the final IDES rating), the DRAS must also establish an EP 040 for the supplemental claim issue(s). The date of claim of the EP 040 must reflect the day following the SMs discharge.

Deciding Supplemental Claim Issues and Resolving EP 040

To the extent possible, supplemental claim issues should be addressed in the final IDES rating. If the supplemental claim issue(s) have been fully decided in the IDES rating, the EP 040 must be cleared when the final IDES rating is promulgated. If the supplemental claim issue(s) were not resolved in the IDES/BDD rating, the EP 040 must remain pending and will be processed (outside of IDES) in accordance with standard supplemental claim procedure.

Note- we are considering the solution for BDD applicability and will advise next month.