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

This Read-Ahead (R/A) is provided to facilitate discussion during the Conference Call.

Call Notes for the March 2023 Call are in Appendix 1. The TMS # for this month’s call will be provided during the call and will be active about a week after the call. A Calendar Blast will notify the field when the TMS # is active.

**Call-in Information**

Microsoft Teams meeting

[Click here to join the meeting](https://teams.microsoft.com/l/meetup-join/19%3Ameeting_MGQ3YzU1N2EtMWJiOC00NzA4LWJmYmYtYTc3ZjhlYjFmNWY5%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: 63193284#

The Read Ahead is sent out via a Calendar Invite update.

Remember to mute your microphone and turn off your camera.

To ask a question after the call begins, please raise your hand (click the hand icon), or type it in the Teams Chat—**do not unmute to ask a question, comment, or respond to questions until called upon**. Once your question/comment is addressed, lower your hand (click the hand icon again). Scenario/Case Specific questions will not be answered on the call. Send an email with details to the appropriate staff email box. Ask questions about the topic(s) being discussed, all other questions should be asked during Open Floor.

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 R/A is available and for notification when the TMS number is active.

General Topic for Discussion

**Call Rules and Expectations**

1. This call is provided by Compensation Service Pre-Discharge Programs to provide updates, address issues and field questions relevant to BDD and IDES policy and procedures. The Pre-Discharge Staff is committed to ensure MSCs and other field personnel have accurate and up-to-date information regarding BDD and IDES policy and procedures.
2. The call is being recording and transcribed for training purposes and will be posted in TMS.
3. You are expected to conduct yourself in a professional courteous manner to include refraining from inappropriate language and comments.
4. Do not forward the invite to or invite non-VA employees.

**PACT Act Quality Errors Discussion**

James Sharpe (Quality Assurance Consultant, Comp Service) will provide information on PACT Act Quality Errors

**BDD and IDES Corporate Email Addresses**

The BDD and IDES Corporate mailboxes are for VA use and the addresses should not be provided to DoD. If DoD has a concern, they should email the MSC and/or DRAS, and that email can be forwarded if needed.

**BDD and IDES Exams Billing**

Service members (SM) should not get billed for BDD or IDES exams and should not pay any bills received. If a SM receives a bill, the SM should call the vendor immediately and inform their MSC. Please inform your SMs of this during the in-briefing. The MSC should send an email to the MDEO corporate box with billing info.

**Update on Vendors for BDD and IDES Exams**

As of May 2, 2023, OSHS (LHI) will not appear as a suggested vendor option for all Pre-Discharge Examination Scheduling Requests (ESR) in Exam Management System (EMS). Please continue using the suggested vendor that EMS generates. OSHS (LHI) will continue to be an option in EMS for BDD excluded and other claim types.

OSHS will continue to be available for Rework only for Pre-Discharge ESRs.

Note: Do not use “alternate vendor” to select (LHI) for routing Pre-Discharge work.

Contact VAVBAWAS/CO/Contract Examination Inquiries (and cc the IDES Mailbox or BDD Mailbox) for exam related questions.

**DRAS – Timely Notification of Release from Active-duty**

Timely notification of IDES participants’ release from active-duty service is vital to the DRAS’ ability to release benefits as quickly as possible after discharge but has been an on-going challenge affecting Navy Service members (SMs) in particular, in recent years. The Providence DRAS implemented a new procedure for tracking discharge notification timeliness at the beginning of fiscal year 2023 and is conducting a Customer Experience Action Plan focused on defining this problem and reducing its impact throughout the FY.

DoD is supposed to notify VA of SMs’ separation within one day of discharge, and the DRAS has 30 days to complete a final rating, measuring from the date of separation to the date VA notifies the participant of the final rating and award. The DRAS collected notification timeliness data on more than 2,000 completed final rating cases during the first quarter of FY23 and found that average notification time for Navy SMs was 21 days, as compared to between 2 and 6 days for SMs from other branches served by Providence. Notification delays had a major impact on final rating completion times.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | Final Ratings Completed | Average Days to Complete | Average Notification Time | Average Processing Time |
| Air Force | 298 | 29.4 | 2.3 | 27.1 |
| Marine Corps | 503 | 33.4 | 5.9 | 27.5 |
| Navy | 1,274 | 45.3 | 21.0 | 24.3 |
| Total | 2,075 | 40.1 | 14.7 | 25.5 |

How can you help?

* If you are notified of a discharge date for an IDES SM, please enter it into the Date of Separation field in VTA promptly.
* Encourage your SM to send in their DD214s as soon as they are available.

**PDP M21-1 Updates**

There have been several recent PDP M21-1 updates, which are detailed below.

1. [M21-1, VIII.iv.1.B.1.d](https://vaww.vrm.km.va.gov/system/templates/selfservice/va_kanew/help/agent/locale/en-US/portal/554400000001034/content/554400000177469/M21-1-Part-VIII-Subpart-iv-Chapter-1-Section-B-Development-for-Posttraumatic-Stress-Disorder-PTSD-Claims-Related-to-Personal-Trauma#March) – The [Personal Trauma Development Checklist](https://vbaw.vba.va.gov/bl/21/rating/rat06h.htm) and [Personal Trauma Incident/Marker Worksheet](https://vbaw.vba.va.gov/bl/21/rating/rat06h.htm) are no longer required to be completed for all BDD and BDD-excluded claims for personal trauma to include Military Sexual Trauma (MST).
2. [M21-1, X.i.6.D.5.a](https://www.knowva.ebenefits.va.gov/system/templates/selfservice/va_ssnew/help/customer/locale/en-US/portal/554400000001018/content/554400000177952/M21-1-Part-X-Subpart-i-Chapter-6-Section-D-Ancillary-Benefits-and-Other-Issues-Involving-Benefits-Delivery-at-Discharge-BDD-or-BDD-Excluded-Claims#5) – When having an initial meeting with a pregnant BDD claimant, MSCs must advise the claimant of the following:
* Medical professionals who examine BDD claimants may, at their discretion, defer some or all examinations because of pregnancy.
* Without the medical evidence from a deferred examination, VA may have to defer a decision on some or all claimed disabilities.
* Deferral of a decision will not adversely affect the ultimate outcome of the claim.
* The claimant must notify VA of any changes in mailing address or telephone number. This enables VA to follow up with the claimant on any deferred decisions.
* The claimant should contact VA if VA does not follow up on any deferred decision within 30 days after the expected delivery date.
1. [M21-1, X.i.6.D.5.b](https://www.knowva.ebenefits.va.gov/system/templates/selfservice/va_ssnew/help/customer/locale/en-US/portal/554400000001018/content/554400000177952/M21-1-Part-X-Subpart-i-Chapter-6-Section-D-Ancillary-Benefits-and-Other-Issues-Involving-Benefits-Delivery-at-Discharge-BDD-or-BDD-Excluded-Claims#5) – MSCs must include the following remarks in any examination request for a pregnant BDD claimant:

*Please be advised that this individual has indicated a current pregnancy. If the examining physician determines that this examination (or any part of this examination) is medically contraindicated, please clearly indicate which parts of the examination were not completed due to the pregnancy.*

*Further, the examiner should indicate the earliest date that the examination may be safely completed.*

1. [M21-1, X.i.6.D.5.c](https://www.knowva.ebenefits.va.gov/system/templates/selfservice/va_ssnew/help/customer/locale/en-US/portal/554400000001018/content/554400000177952/M21-1-Part-X-Subpart-i-Chapter-6-Section-D-Ancillary-Benefits-and-Other-Issues-Involving-Benefits-Delivery-at-Discharge-BDD-or-BDD-Excluded-Claims#5) – The RO will rate any claimed conditions that may be awarded based on the evidence of record and defer consideration of any additional disabilities that could not be examined until conclusion of the pregnancy.
2. [M21-1, X.i.6.B.1.a](https://www.knowva.ebenefits.va.gov/system/templates/selfservice/va_ssnew/help/customer/locale/en-US/portal/554400000001018/content/554400000177950/M21-1-Part-X-Subpart-i-Chapter-6-Section-B-Benefits-Delivery-at-Discharge-BDD-and-Initial-Processing#1) – Provide a completed *Separation Health Assessment - Part A, Self-Assessment* (SHA, Part A) with a response of either *Separation from Military Service* or *Retirement* selected as the *PURPOSE OF EXAM* was added as a requirement to qualify for the BDD program.
3. [M21-1, X.i.6.B.3.g](https://www.knowva.ebenefits.va.gov/system/templates/selfservice/va_ssnew/help/customer/locale/en-US/portal/554400000001018/content/554400000177950/M21-1-Part-X-Subpart-i-Chapter-6-Section-B-Benefits-Delivery-at-Discharge-BDD-and-Initial-Processing#1) – Claimants are required to provide either [*VA Form 21-0781, Statement in Support of Claim for Service Connection for Post-Traumatic Stress disorder (PTSD)*](http://www.vba.va.gov/pubs/forms/VBA-21-0781-ARE.PDF), or [*VA Form 21-0781a, Statement in Support of Claim for Service Connection for Post-Traumatic Stress Disorder (PTSD) Secondary to Personal Assault*](http://www.vba.va.gov/pubs/forms/VBA-21-0781a-ARE.pdf). However, as a general principle, completion of these forms is not necessary for BDD and BDD-excluded claims.
* If the examination on a claim for SC for PTSD is not completed until after service, the rating activity will review the evidence and, if necessary to establish SC, order a medical opinion on whether PTSD existed, or had its onset during, during service.
* The rating activity may require completion of the [*VA Form 21-0781*](http://www.vba.va.gov/pubs/forms/VBA-21-0781-ARE.PDF) or [*VA Form 21-0781a*](http://www.vba.va.gov/pubs/forms/VBA-21-0781a-ARE.pdf), in a BDD or BDD-excluded claim for PTSD if
	+ credible supporting evidence of a claimed in-service stressor is required
	+ the evidence of record is not sufficient to corroborate the claimed in-service stressor upon which a diagnosis of PTSD was based, and
	+ the evidence of record is not sufficiently detailed to permit additional stressor research.
1. [M21-1, X.i.6.B.3.k](https://www.knowva.ebenefits.va.gov/system/templates/selfservice/va_ssnew/help/customer/locale/en-US/portal/554400000001018/content/554400000177950/M21-1-Part-X-Subpart-i-Chapter-6-Section-B-Benefits-Delivery-at-Discharge-BDD-and-Initial-Processing#1) – Upon receipt of a BDD claim ***without*** substantially complete STRs (to include a SHA, Part A) for the current period of service the claims processor must
* establish an EP 336 with the *Pre-Discharge Excluded*claim label
* enter a note in VBMS indicating that the claim does not meet BDD requirements because it was received without STRs
* scan any other evidence locally if a scanner with a designated resolution is available or forward for Veterans Claims Intake Program (VCIP) scanning, and
* send two requests for the STRs to the service member with a 15-day suspense for each request.

***Exception***: If there are fewer than 15 days remaining before reaching 89 days until the anticipated discharge date, request the STRs, but set the suspense for day 89. No additional STR requests are required, even if only one request has been made.

***Notes***:

* Development for ***current*** period of service STRs for SMs who have not yet been discharged requires:
	+ contacting the service member by telephone, e-mail, or letter (if telephone and e-mail development is not successful), and
	+ assisting the service member in obtaining copies of STRs from the MTF whenever possible.
* If a completed SHA, Part A is missing, instruct the service member to download the form from the [*Public DBQs website*](https://www.benefits.va.gov/compensation/dbq_publicdbqs.asp)and to complete and submit the form. Encourage the SM to upload the evidence to VA.gov. Remind the SM that a completed SHA, Part A must be of record before BDD examinations can be requested.
1. [M21-1, X.i.6.C.1.b (Step 10)](https://www.knowva.ebenefits.va.gov/system/templates/selfservice/va_ssnew/help/customer/locale/en-US/portal/554400000001018/content/554400000177951/M21-1-Part-X-Subpart-i-Chapter-6-Section-C-Division-of-Responsibilities-Benefits-Delivery-at-Discharge-BDD-and-BDD-Excluded-Claims) – A SHA, Part A, must be part of the eFolder prior to requesting the examination.
2. [M21-1, X.i.6.C.1.b (Steps 11 and 12)](https://www.knowva.ebenefits.va.gov/system/templates/selfservice/va_ssnew/help/customer/locale/en-US/portal/554400000001018/content/554400000177951/M21-1-Part-X-Subpart-i-Chapter-6-Section-C-Division-of-Responsibilities-Benefits-Delivery-at-Discharge-BDD-and-BDD-Excluded-Claims) – If a basic or straightforward medical opinion is required, it will be ordered as part of the exam request in accordance with [M21-1, Part IV, Subpart i, 2.A.7](https://www.knowva.ebenefits.va.gov/system/templates/selfservice/va_ssnew/help/customer/locale/en-US/portal/554400000001018/content/554400000180498/M21-1%2C-Part-IV%2C-Subpart-i%2C-Chapter-2%2C-Section-A---Examination-Requests-Overview). MSCs are responsible for requesting opinions on
	* + service connection (SC)
		+ secondary SC, and
		+ in-service aggravation of a pre-service disability.

If a complex medical opinion is required

* the MSC will inform the station’s rating activity of the condition(s) requiring the complex medical opinion and the reasons why
* the rating activity will, within three days
	+ review the evidence of record
	+ draft the required medical opinion
	+ upload the draft opinion to the eFolder, and
	+ notify the MSC by e-mail that the medical opinion request is available, and
* the MSC will copy and paste the draft medical opinion into the examination request before submitting it.
1. [M21-1, X.i.6.C.1.d](https://www.knowva.ebenefits.va.gov/system/templates/selfservice/va_ssnew/help/customer/locale/en-US/portal/554400000001018/content/554400000177951/M21-1-Part-X-Subpart-i-Chapter-6-Section-C-Division-of-Responsibilities-Benefits-Delivery-at-Discharge-BDD-and-BDD-Excluded-Claims) – After all development actions are complete, the intake site must ensure that the contract examination in VBMS shows a status of *Acknowledgement: Received from Vendor* for all requested examinations ***before*** changing the diary EP 336 to the proper rating EP and *BDD* claim label.
2. [M21-1, X.i.6.C.2.b](https://www.knowva.ebenefits.va.gov/system/templates/selfservice/va_ssnew/help/customer/locale/en-US/portal/554400000001018/content/554400000177951/M21-1-Part-X-Subpart-i-Chapter-6-Section-C-Division-of-Responsibilities-Benefits-Delivery-at-Discharge-BDD-and-BDD-Excluded-Claims) – ***Important***: If the BDD-excluded claimant submits a copy of their STRs for their current period of service and is available to report to examinations, request the examinations within five calendar days of the date the documents are uploaded to VBMS.

If examinations are not requested, enter a *Secondary Action Required* tracked item as noted in [M21-1, Part IV, Subpart i, 1.A.1.e](https://www.knowva.ebenefits.va.gov/system/templates/selfservice/va_ssnew/help/customer/locale/en-US/portal/554400000001018/content/554400000180494/M21-1%2C-Part-IV%2C-Subpart-i%2C-Chapter-1%2C-Section-A---Duty-to-Assist-With-Providing-a-Medical-Examination-or-Opinion).

1. [M21-1, X.i.6.C.2.e](https://www.knowva.ebenefits.va.gov/system/templates/selfservice/va_ssnew/help/customer/locale/en-US/portal/554400000001018/content/554400000177951/M21-1-Part-X-Subpart-i-Chapter-6-Section-C-Division-of-Responsibilities-Benefits-Delivery-at-Discharge-BDD-and-BDD-Excluded-Claims) – When requesting examinations for BDD-excluded claimants the claims processor must
* verify that the SM will be available for examinations at the provided *current or forwarding address*
* utilize the ERRA tool to determine where the examination should be requested
* select the radial button NO next to the text *BDD/IDES Claim?* in the ERRA tool, and
* complete at least two attempts to contact the SM to verify their *current or forwarding address*.
* If the claims processor is unable to contact the SM after at least two attempts, request the examination based on the evidence of record.
1. [M21-1, X.i.6.C.3.a (Step 6)](https://www.knowva.ebenefits.va.gov/system/templates/selfservice/va_ssnew/help/customer/locale/en-US/portal/554400000001018/content/554400000177951/M21-1-Part-X-Subpart-i-Chapter-6-Section-C-Division-of-Responsibilities-Benefits-Delivery-at-Discharge-BDD-and-BDD-Excluded-Claims) – ***Note***: RFD BDD claims must be routed by NWQ within five days of discharge.
2. [M21-1, X.i.6.C.3.e](https://www.knowva.ebenefits.va.gov/system/templates/selfservice/va_ssnew/help/customer/locale/en-US/portal/554400000001018/content/554400000177951/M21-1-Part-X-Subpart-i-Chapter-6-Section-C-Division-of-Responsibilities-Benefits-Delivery-at-Discharge-BDD-and-BDD-Excluded-Claims) – A partial rating may be completed on issues ready for a decision if
* routed for a decision with 29 or fewer days remaining on active duty, and
* a compensable evaluation is assigned (10 percent or higher and/or special monthly compensation).
1. [M21-1, III.ii.2.A.1.f](https://www.knowva.ebenefits.va.gov/system/templates/selfservice/va_ssnew/help/customer/locale/en-US/portal/554400000001018/content/554400000014117/M21-1-Part-III-Subpart-ii-Chapter-2-Section-A-General-Information-on-Service-Records#1f) – For STRs to be substantially complete for Benefits Delivery at Discharge (BDD) or Integrated Disability Evaluation System (IDES) claims there must also be a *Separation Health Assessment – Part A Self-Assessment*for the current period of service.
2. [M21-1, II.iii.3.A.1.b](https://www.knowva.ebenefits.va.gov/system/templates/selfservice/va_ssnew/help/customer/locale/en-US/portal/554400000001018/content/554400000174881/M21-1-Part-II-Subpart-iii-Chapter-3-Section-A-Claims-Establishment#1b) – Military service information, such as branch of service and date of release from active duty for a service member’s current period of service must be updated in VBMS before establishment of any Pre-Discharge claim.

IDES Reminders

DoD Signature on March 2023 version of VA Form 21-0819

MSCs are reminded that per Section 4.2.b of DoD Manual 1332.18, Volume 1 (February 24, 2023), the referring provider must complete block 17, sign and date blocks 18 and 19 of the March 2023 VA Form 21-0819. If the form is not signed by a provider, the form is considered incomplete, and the referral is improper.

VTA Reminders

Changing the Medical Evaluation End Date

The Medical Evaluation End Date (MEED) will not be removed/changed after the exams have been provided to the PEBLO if the DRAS finds issues with an exam(s). The DRAS will order what is needed. The MEED will also not be removed/changed if there is a NARSUM Date entered by the PEBLO.

There will be scenarios not covered here when the MEED needs to be removed, in those instances contact the IDES Mailbox for guidance.

Note 1: Referred conditions will be different and might need a new case or conversation between the MSC and PEBLO, but again in most instances the MEED will not be removed if a NARSUM Date is in VTA.

Note 2: It is very important MSCs conduct a thorough review of the exams before entering the MEED.

Upcoming Conference Calls

The next BDD/IDES Call is scheduled for Tuesday, June 13, 2023, 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), Wednesday, May 24, 2023.

Open Floor

**Appendix 1: Call Notes from the March 2023 BDD/IDES Conference Call**

**Question: Have Separation Health Assessment (SHA)- Part A requirements been communicated with DOD?**

**Answer:** Yes, the Pre-Discharge staff has communicated this with the DoD, and with the VSO's. Compensation Service (CS) has also communicated this requirement on the VSM call. There is a communication plan which has been established as a blast that has gone out to the service members. Benefits Advisors have also been made aware of the requirements of the new form for BDD and IDES claims as well.

**Question: Who is responsible for providing these SHA forms to the SMs?**

**Answer:** The SHA- Part A is a required form. If the form is not received it will be the responsibility of the MSC or claims processor to communicate the need to the claimant on the completion of the form. The SHA Part A is required before an MSC or claims processor requests an examination. The MSC will direct the SM where to retrieve the form and explain to the claimant how to get the document to VA. The DoD will have training to help the claimants but until they receive the training it will be the MSCs or claim processor’s responsibility to direct and guide claimants on the completion of the SHA-Part A

**Question: If the SM completes SHA-Part A and lists twenty items, but on the 21-526 EZ, they only list ten items, they are claiming compensation for, then the MSC is only required to do those ten items that are claimed on the 21-526 EZ correct?**

**Answer:** Correct, the SHA- Part A is a self -assessment completed by the SM. The 21-526 EZ remains, the proper claim form for any conditions the SM is claiming with VA.

**Question: Who determines if SHA-Part A is completed correctly?**

**Answer:** If MSC notices that SHA Part A is incomplete, the MSC would inform the service member the information is incomplete and assist him with the completion of the document.

**Question: What if the Service member refuses to sign SHA Part A?**

**Answer:** The SM is not required to sign the Part A.

**Question: If PEBLO does not provide SHA Part A, should MSC return to PEBLO?**

**Answer:** MSCs will be good partners with DoD and advocates for our SM, so if by chance, the SHA Part A is not included in the IDES Referral come May 1, 2023, MSCs will NOT return the referral; MSCs will develop for it to the SM until DD Form 3146 is implemented; however, the Pre-Discharge staff asks MSCs to send an email informing our staff which locations the SHA Part A is not being submitted with referrals, so our staff can circle back to DoD. The Pre-Discharge staff is current editing the interim and M21 guidance prior to May 1.

**Question: If MSC has pending claims that are received prior to April 1, 2023, will they require an SHA Part A?**

**Answer:** If the SM has submitted their claim prior to April 1st then MSC would follow the previous guidelines, no SHA Part A is required.

**Question: What should MSC do if a contract provider cannot conduct exams?**

**Answer:** If MSCs have a situation like this, they should reach out to MDEO. These are unique situations that rarely happen in locations like Hawaii and Alaska and other obscure locations**.** Send inquiry including all details to the Medical Disability Examination Office (MDEO) **VAVBAWAS/CO/Contract Examination Inquiries**

**Question: If MSC receives a BDD claim, SMs must go into the portal to retrieve the SHA Part A form, download the form, complete the form, and then submit the form back to va.gov, correct?**

**Answer:** Correct.

**Question: Can SM submit SHA Part A without an established claim?**

**Answer:** No, SM should only submit with IDES or BDD claim. Completion of the SHA Part A form is a part of the overall claim process.

**Question: Can MSC change the exam vendor if the request comes from SM? EMS has a drop-down box with the reason SM would like an exam assigned to another vendor and one of those drop-down states’ verbiage along the line the veteran prefers vendor.**

**Answer:** Per MDEO- MSC should accept the vendor that is assigned in EMS, direct guidance states vendor selection is not permitted.

**Question: Why is there a delay of exam timeliness with LHI? “It’s still very timely for exam documents to be returned, with some exams taking months to get back”**

**Answer:** Per MDEO- Vendor timeliness is measured on a quarterly basis, not on a case-by-case basis. Send inquiries including all details to the Medical Disability Examination Office (MDEO) **VAVBAWAS/CO/Contract Examination Inquiries**