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 from the May 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#](tel:+18727010185,,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.

**Separation Health Assessment (SHA), Part A Self - Assessment Update**

Transitioning Service members (SM), filing claims through either the Benefits Delivery at Discharge (BDD) or Integrated Disability Evaluation System (IDES) programs, must complete the SHA - Part A Self-Assessment form prior to requesting VA examinations.

During a recent review of claims, 98% IDES referrals contained the completed Part A. If Part A is not included in the IDES referral, do NOT return the referral, but develop for it. If a Service member (SM) refuses to sign the Part A, accept the form as they are not required to sign it. If the SM refuses to complete the Part A, please notify us with claim details in the [Pre-Discharge](mailto:Predischarge.VBACO@va.gov) and [IDES](mailto:IDES.VBACO@VA.GOV) mailboxes. The [SHA Part A Interim Guidance](https://vbaw.vba.va.gov/VBADOD/separation-health-assessment-guidance.asp) has been updated.

**Updating the Pre-Discharge MSC SP Site**

The following message was distributed by OFO on June 9, to all Districts. IDES and BDD Supervisors should make updates as needed.

Districts,

**Please forward information to the Regional Offices (ROs) in your jurisdiction.**

The Office of Field Operations (OFO) Project and Program Management (PPM) division, in collaboration with Compensation Service (CS 219) Pre-Discharge Program Staff, are requesting all Regional Offices (RO) review the Integrated Disability Evaluation System (IDES) Military Services Coordinator (MSC) and Benefits Delivery at Discharge (BDD) MSC lists on the [Compensation Service Pre-Discharge Programs MSC Information](https://gcc02.safelinks.protection.outlook.com/?url=https%3A%2F%2Fvaww.infoshare.va.gov%2Fsites%2F212Procedures%2F212D_MSC_Info%2FSitePages%2FHome.aspx&data=05%7C01%7C%7C4135874e8dfe47bbfb5208db692265a1%7Ce95f1b23abaf45ee821db7ab251ab3bf%7C0%7C0%7C638219368693433048%7CUnknown%7CTWFpbGZsb3d8eyJWIjoiMC4wLjAwMDAiLCJQIjoiV2luMzIiLCJBTiI6Ik1haWwiLCJXVCI6Mn0%3D%7C3000%7C%7C%7C&sdata=KVzJDGEXIJcQY2cZL4%2B1wEfbATPiwXhf8X9ZyD2iqJ0%3D&reserved=0) SharePoint site. As a reminder, throughout the fiscal year, ROs are responsible for monitoring and updating these lists as needed. This includes adding new staff and removing departures.

**Specific to BDD:**

Each RO must assign a BDD coordinator to monitor the BDD claims it receives, including BDD claims routed to the RO from the NWQ ([M21-1 X.i.6.B.3.b](https://gcc02.safelinks.protection.outlook.com/?url=https%3A%2F%2Fvaww.vrm.km.va.gov%2Fsystem%2Ftemplates%2Fselfservice%2Fva_kanew%2Fhelp%2Fagent%2Flocale%2Fen-US%2Fportal%2F554400000001034%2Fcontent%2F554400000177950%2FM21-1-Part-X-Subpart-i-Chapter-6-Section-B-Benefits-Delivery-at-Discharge-BDD-and-Initial-Processing%233&data=05%7C01%7C%7C4135874e8dfe47bbfb5208db692265a1%7Ce95f1b23abaf45ee821db7ab251ab3bf%7C0%7C0%7C638219368693433048%7CUnknown%7CTWFpbGZsb3d8eyJWIjoiMC4wLjAwMDAiLCJQIjoiV2luMzIiLCJBTiI6Ik1haWwiLCJXVCI6Mn0%3D%7C3000%7C%7C%7C&sdata=WnoMHLv7AXSkmMw8pQohsFO9NYKIA3JXu1Jp%2FfyuUds%3D&reserved=0)).

* A military installation (intake site: [M21-1 X.i.6.B.3.a](mailto:https://vaww.vrm.km.va.gov/system/templates/selfservice/va_kanew/help/agent/locale/en-US/portal/554400000001034/content/554400000177950/M21-1-Part-X-Subpart-i-Chapter-6-Section-B-Benefits-Delivery-at-Discharge-BDD-and-Initial-Processing%233b)) is defined as a location where the MSC works and receives BDD claims or itinerantly visits and accepts BDD claims. This does not include outreach events. For example, Gold Town Coast Guard Station: If you have an MSC that goes to this location on a regular basis to accept BDD claims, this MSC should be entered on the SharePoint site. If BDD claims from this location are mailed to an MSC or the RO, brought in person to the RO, or submitted through VA.gov, there is no need for an entry in the SharePoint site.
* The BDD Coordinator and Coach are typically the same but can be different if the RO stipulates or based on job title.

If your RO has military installation entries, ensure to populate all data entries (address, phone number, etc.).

**Action Item:**

ROs please review information supplied in the [Compensation Service Pre-Discharge Programs MSC Information](https://gcc02.safelinks.protection.outlook.com/?url=https%3A%2F%2Fvaww.infoshare.va.gov%2Fsites%2F212Procedures%2F212D_MSC_Info%2FSitePages%2FHome.aspx&data=05%7C01%7C%7Cda5f9f1bb95d43e644ae08db67915357%7Ce95f1b23abaf45ee821db7ab251ab3bf%7C0%7C0%7C638217646104124053%7CUnknown%7CTWFpbGZsb3d8eyJWIjoiMC4wLjAwMDAiLCJQIjoiV2luMzIiLCJBTiI6Ik1haWwiLCJXVCI6Mn0%3D%7C3000%7C%7C%7C&sdata=3yjt2bRpiL7szqp4kkwWw9hG7VI%2BBoGqGvQZiUJKZTI%3D&reserved=0) SharePoint site and update per the attached *Date Updates for the Pre-Discharge Programs MSC SP* PowerPoint. Certify completion to CS 219 POC [Andrew Reese](mailto:Andrew.Reese@va.gov) with a Cc to the [OFO mailbox](mailto:VAVBAWAS/CO/OFO%20%3cOFO.VBACO@va.gov%3e) by **COB Wednesday, June 23, 2023**.



BDD Reminders

**BDD Claims Development for STRs and/or SHA, Part A**

Please review the below updated [BDD Claims Development for STRs and/or SHA, Part A](http://vbaw.vba.va.gov/bl/21/rating/docs/Part%20A%20Guidance.docx) posted on the [CS Interim Guidance page](https://vbaw.vba.va.gov/bl/21/rating/guidance.htm).

Effective June 2, 2023, upon receipt of a BDD claim ***without*** substantially complete STRs (to include a completed SHA, Part A) for thecurrentperiod of service the claims processor must:

* establish an EP 336 with the *BDD* claim label
* enter a note in VBMS indicating that the claim was received without STRs and/or a completed SHA, Part A,
* scan any other evidence locally if a scanner with a designated resolution is available or forward for Veterans Claims Intake Program (VCIP) scanning,
* contact the SM by telephone and/or e-mail to request the STRs and/or a completed SHA, Part A, inform the SM that VA examinations cannot be requested until STRs and/or a completed SHA, Part A is received,
* if telephone development is unsuccessful, leave a message to submit their STRs and/or completed Part A and inform the SM that VA examinations cannot be requested until STRs and/or a completed SHA, Part A is received,
* document all telephone contact including leaving the message on the [VA Form 27-0820](https://vbaw.vba.va.gov/bl/20/cio/20s5/forms/VBA-27-0820-ARE.pdf),
* if telephone and e-mail development are unsuccessful, send the SM a letter requesting the STRs and/or a completed SHA, Part A, but remove the below BDD-exclusion language from the letter (Fig A). Add the below language to the letter (Fig. A),
* enter a “Request Service Treatment Records from Veteran” tracked item and set a 15-day suspense for the tracked item,
* if after the 15-day suspense expires and the STRs and/or a completed SHA, Part A are not of record, contact the SM by telephone and/or e-mail to request the STRs and/or a completed SHA, Part A, inform the SM that VA examinations cannot be requested until STRs and/or a completed SHA, Part A is received,
* if telephone development is unsuccessful, leave a message to submit their STRs and/or completed Part A and inform the SM that VA examinations cannot be requested until STRs and/or a completed SHA, Part A is received,
* document all telephone contact including leaving the message on the [VA Form 27-0820](https://vbaw.vba.va.gov/bl/20/cio/20s5/forms/VBA-27-0820-ARE.pdf),
* if telephone and e-mail development are unsuccessful, send the SM a letter requesting the STRs and/or a completed SHA, Part A, but remove the below BDD-exclusion language from the letter (Fig A). Add the below language to the letter (Fig. A), and
* enter a “Request Service Treatment Records from Veteran” tracked item and set a 15-day suspense for the tracked item.

***Exception:*** If there are fewer than 15 days remaining before reaching 89 days until the anticipated discharge date, request the STRs and/or a completed Part A, but set the suspense date for the “Request Service Treatment Records from Veteran” tracked item to day 89 prior to discharge. No additional STR and/or Part A requests are required, even if only one request has been made.

**Fig. A**

Remove:

~~Your entire disability claim was removed from the BDD program, because it did not meet one or more of these program requirements:~~

Add:

* + A completed Separation Health Assessment (SHA) - Part A Self- Assessment form is required for all BDD claims. **Please note, VA cannot request any examinations for your claim until a completed Part A is received.**
  + Please complete the SHA, Part A and upload it to your claim on VA.gov at [www.va.gov/disability/upload-supporting-evidence/](http://www.va.gov/disability/upload-supporting-evidence/) or please see the VA contact information below. The SHA, Part A can be accessed at [www.benefits.va.gov/compensation/docs/SHA\_DBQ\_Part\_A\_Self-Assessment.pdf](http://www.benefits.va.gov/compensation/docs/SHA_DBQ_Part_A_Self-Assessment.pdf).

Remove:

~~As a result, VA will begin processing your disability claim after separation from military service.~~

IDES Reminders

**Duplicates DBQs in VBMS**

Recent changes removed the fix for auto archiving duplicate DBQs coming over from HAIMS. The Pre-Discharge Staff is aware the removal of the fix is causing duplicate DBQs in VBMS again, which causes additional work for MSCs and DRAS’ to move the duplicates to the Archive Bin. A fix is scoped for VBMS 30.4 release on June 18, 2023. Please direct any IDES questions to the [IDES Mailbox](mailto:VAVBAWAS/CO/IDES%20%3cIDES.VBACO@VA.GOV%3e).

Sensitive Cases

If an MSC receives a case that is sensitive or suspects it will be sensitive (SM works/has family that works at the RO, etc.) and cannot work/feels they will not be able to work the case, the Coach will contact the [IDES Mailbox](mailto:VAVBAWAS/CO/IDES%20%3cIDES.VBACO@VA.GOV%3e) immediately. Do not let the case linger as any delay in notifying causes timeliness issues.

Handling Cases Involving a Participant Who Is Too Disabled to Travel to an Examination

[M-21, X.i.6.F.2.n](https://vaww.vrm.km.va.gov/system/templates/selfservice/va_kanew/help/agent/locale/en-US/portal/554400000001034/content/554400000177955/M21-1-Part-X-Subpart-i-Chapter-6-Section-F-Integrated-Disability-Evaluation-System-IDES-Development-and-Examinations#2n). discusses this topic and says MSCs, PEBLOs, and physicians at MTFs are responsible for determining whether a participant is too disabled to travel to an examination. MSCs should not request a DRAS review without a statement from the referring physician (not the PEBLO) with a synopsis of the SMs issue(s) and if too disabled to travel to exams.

Veterans Tracking Application (VTA) Reminders

Exit Interview Data Fields when the Final Disposition Date (FDD) is Changed

The Exit Interview Start Date is populated with the date the FDD is entered by the PEBLO or PEB. This date populates the case on the Pending Exit Interview Report, and MSCs have a goal of 14 days to complete the Exit Interview by populating the Exit Interview Outcome and Exit Interview Outcome Date. If the PEB/PEBLO changes the FDD (which would change the Exit Interview Start Date) after the Exit Interview has been completed do not update/change the Exit Interview data. Changing this after the exit is completed is falsifying data.

VTA move to Salesforce

VTA is moving to Salesforce (SF) with a projected Go-Live date of September 25, 2023. Over the last year or so the Pre-Discharge Staff, DoD and SF programmers we have been conducting weekly meetings, writing requirements, re-programming and testing to ensure a smooth transition. All data to include user profiles will be transferred to SF. Re-registration will not be required and users will continue to sign-in with PIV/CAC. As September 25th gets closer, we will be providing more info and training/demonstrations.

Upcoming Conference Calls

The next BDD/IDES Call is scheduled for Tuesday, July 11, 2023, 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), Monday, June 19, 2023.

Open Floor

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

**Question:** If someone filed a Pre-Discharge claim and they have no prior period of service, is it safe to say that we should not even entertain special issues?

**Answer:** Per the SOP Guidance, it specifically says that you know active duty pre discharge claims a should not be considered under packed act unless a claim condition is from a prior period of service (pages 4 and 15).

**Question:** Is LHI still conducting BDD-excluded claims?

**Answer:** Yes, LHI will continue to conduct examinations for BDD Excluded claims.

**Question:** What tracked item are we using for the two 15 days suspense for each request?

**Answer:** Use the “Request Service Treatment Records from Veteran” tracked item found in [Appendix D. Index of Claim Stage Indicators, D.1.b](https://gcc02.safelinks.protection.outlook.com/?url=https%3A%2F%2Fvaww.vrm.km.va.gov%2Fsystem%2Ftemplates%2Fselfservice%2Fva_kanew%2Fhelp%2Fagent%2Flocale%2Fen-US%2Fportal%2F554400000001034%2Fcontent%2F554400000036576%2FAppendix-D-Index-of-Claim-Stage-Indicators%253FarticleViewContext%3Darticle_view_related_article%3Fquery%3DSTR%2520tracked%2520item%23lb&data=05%7C01%7C%7C9cea90abd09a43488f8e08db5156cce1%7Ce95f1b23abaf45ee821db7ab251ab3bf%7C0%7C0%7C638193205465746999%7CUnknown%7CTWFpbGZsb3d8eyJWIjoiMC4wLjAwMDAiLCJQIjoiV2luMzIiLCJBTiI6Ik1haWwiLCJXVCI6Mn0%3D%7C3000%7C%7C%7C&sdata=nHyaQdOlwB2sB%2BbXZoQEFormHi8WhgN82xxbbUoPmNc%3D&reserved=0).

**Question:** What should the suspense date be for a BDD Excluded claim when the SM explicitly states the day, they will be available for exams? I received an error stating that the suspense should be RAD +1

**Answer:** The suspense date should be the date they indicate their availability.

**Question:** The manual indicates that we should request STRs directly from the SM. However, my site has an agreement where we can get the STRs directly from the MTF. Is there going to be an update to the manual indicating that we should be able to request them directly from the MTF?

**Answer:** Yes, we will submit a manual change request for this type of scenario.

**Question:** For the SHA, Part A in IDES, is there any updated guidance for the PEBLOs to provide the documents when the case is referred.

**Answer:** In most cases, PEBLOs have been providing the SHA, Part A in the HAIMS transfer. Be advised that some to the transferred documents have been found in the Archive Bin. In the cases, where the PEBLO does not provide the SHA, Part A, MSC must continue

**Question**: Is anyone addressing the duplicate files in VBMS that is not going to the archives?

**Answer:** Yes, the VBMS OI&T staff is looking into this issue.