Monthly Compensation Service Pre-Discharge Programs (219)
Benefits Delivery at Discharge (BDD) and Integrated Disability Evaluation System (IDES)
Conference Call Read Ahead
October 10, 2023, 2PM ET

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 September 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
+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 Calendar Subscriptions (va.gov) 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.

ChooseVA

VA | U.S. Department of Veterans Affairs

4. Pre-approval by our staff is required before any person provides guidance/updates/other info that is related to BDD or IDES.
5. Do not forward the invite to or invite non-VA employees.

MSC SP Site Updates

Coaches/Supervisors are reminded to update their ROs BDD and IDES info as needed (new/departed personnel, other) at Pre-Discharge Programs MSC Info - Home (sharepoint.com). There are several ROs that need to update their info. Updating this info is important and allows us to know the current Coaches and MSCs for questions/contact.

Errors Identified As Correctable Comments

There have been an increasing number of comments in the chat regarding rebuttals associated with errors identified under Task #12 on the MSC Quality Checklist. Many of these errors are attributed to failing to enter a note in VBMS if no records are found after an Enterprise Search. If a note is not entered, the error falls under **Task 12 – Correctable Comments** (this task houses and routes correctable comments found during the IQR process).

Correctable comments are those items which are not considered to be a "critical" error on the transaction under review, but which require additional processing to ensure the correctness and/or completeness of the claim in general. Errors under this task:

- May require correction
- Does not count towards performance
- Can be easily identified in QMS

  - **Employee Msg**: Error does not count for performance
  - **Question Name**: CorComMSC1
  - **Related Question**: Is the c-file free from other defects requiring correction which are **_not_** considered "critical" to the item(s)/transaction currently under review?

Information related to all quality tasks can be found in M21-4, Chapter 6.

BDD Reminders

BDD Claims Processors eSTRs Responsibilities (During the 120-Day Ramp-Up Period)

The below guidance is available on the Compensation Service Interim Guidance intranet site and will be available on the Pre-Discharge Programs intranet site.

On September 5, 2023, the Department of Defense (DoD) Electronic STR (eSTR) Process began electronically transferring Service member (SM) service treatment records (STRs) within 15 days of the establishment of BDD end product (EP) 336. The eSTR process transfers the digital portion of SM STRs from the Armed Forces Health Longitudinal Technology Application (AHLTA) Web Print (AWP) and Military Health System (MHS) GENESIS STRs. September 5,

2

2023, also marks the start of VA's 120-day eSTR process ramp-up. During the ramp-up, VA will work closely with DoD to ensure the eSTR process is successful and timely, then determine when to remove the requirement for BDD claimants to provide copies of their current period STRs.

Claims processors should follow these interim procedures for processing BDD claims established on or after September 5, 2023:

If	Then
Current period STRs were provided by the SM	• Request VA examinations as directed in M21-1 X.i.6.C.1.b
Current period STRs were received via eSTR transfer	• Request VA examinations as directed in M21-1 X.i.6.C.1.b
Current period STRs are not of **record less than 15 days** from the date the EP 336 was established	• Enter "Awaiting STR Auto Receipt" tracked item • Enter 15 days for "Tracked Item Suspense"
Current period STRs are NOT of record within **15 or more days** from the date the EP 336 was established	• Develop for current period STRs per M21-1 X.i.6.B.3.k • Provide the SMs name, SS#, branch of service, and the date the EP was established to the Pre-Discharge Programs Mailbox (predischarge.vbaco@va.gov) with the subject line "eSTRs 15-day Transfer" • Upload a .pdf file of this email to the SMs VBMS eFolder

Notes:
- If the SM provides a copy of their current period STR, request VA examinations per M21-1 X.i.6.C.1.b
- The Separation Health Assessment Part A – Self-Assessment and current period STRs must be of record when an examination is ordered

IDES Reminders

X.i.6.F.3.j. Failure of an IDES Participant to Report for Examination
This was discussed last month and want to clarify the guidance. At this time, the only required evidence to reschedule an exam is a VTA Note as stated in the reference. Feel free to add a note or document in VBMS as you see fit.
Note: An SHA is required and must be of record, even if SM misses and PEBLO says do not re-schedule.

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

As we approach the holiday seasons, MSCs are reminded to inquire about approved leave (non-emergency) during the initial interview that could interfere with the IDES process, specifically exams (this inquiry should be made during every interview, just not during the holidays). If the SM indicates he or she has approved leave in the first 30 days after the Prepare Claim Start Date (PCSD) that would prevent exam attendance, the MSC should return the referral to the PEBLO as an improper referral and remove the PCSD. Cases where SMs have approved leave after day 30 will not be returned and regular case processing will begin. FY23 ADC for exams was 64 days. SMs will not be penalized for missing exams during their leave period. If exams are scheduled during the leave period and the SM cannot attend, the exams need to be re-scheduled when the SM is available. MSCs should confirm with the PEBLO that they are aware of the upcoming leave and see if something can be worked out (e.g., SM will attend exams while on leave, etc.). Contact the IDES Mailbox with any concerns/issues/questions.

Note: Per DoD policy deferment should not be used by PEBLOs as a reason for cases where the SM is going on leave for less than 30 days, however, if the case is not with the VA the deferment action is the MTFs call. Contact the IDES Mailbox if your MTF is putting cases in deferment that are with the VA.

Handling Cases Involving Pregnant IDES Participants

MSCs are reminded to follow M21-1.X.i.6.K (Topic 3) when an IDES SM is pregnant.

VA Form 0819 Must be Signed

When receiving a referral packet from a PEBLO, the 0819 must be signed. Some locations have reported that the Navy is not signing the 0819 and providing a separate document that states the referral is official and complete. This is not acceptable, and the referral should be called incomplete. You could receive an error if the 0819 is not signed. Until an agreement is reached with DoD, you could receive one of two 0819 versions. If you receive the March 2023 version, the referring doctor is **required** to fill out block 17 and sign and date blocks 18 and 19. If you receive an earlier version, the PEBLO can sign and date blocks 18 and 19.

IDES Servicemember Satisfaction Survey Report (FY23 Q3)

Each quarter, the Defense Health Agency (DHA) provides reports on SM satisfaction with IDES. This report was created to support and enhance improvements to the IDES process. The report summarizes SM feedback on their satisfaction, with the Medical Evaluation Board (MEB) phase. Overall satisfaction reflects the percentage of SMs satisfied with their MEB experience and customer service of their Physical Evaluation Board Liaison Officer (PEBLO) and MSC.

For this report, data was collected on SMs who completed the MEB Phase between January 13 and March 15, 2023. The survey responses were collected between April 4 and May 9, 2023. SMs completed 818 surveys with a 15.5% response rate. DoD set an 80% target for satisfaction with IDES.

During FY23, Q3, 91% of survey respondents expressed overall satisfaction with the MEB phase. Active and Reserve component SMs overall MEB satisfaction rates were 92% and 87%, respectively. This rate continues to exceed the DoD and VA goal of 80%.

- **Satisfaction with VA MSCs**

The report summarized that 84% of SMs were satisfaction with MSC customer service. MSCs are commended for their dedicated and exceptional service to our wounded, ill and injured SMs!

A few recommendations included:

- Review VA MSC availability and ensure all SMs are given the opportunity to meet with their MSC during the MEB phase.
- Provide SMs with methods to report when they cannot reach their MSC and provide alternative resources to answer their questions and address concerns when the MSC is unavailable.

The complete IDES Servicemember Satisfaction Survey Report is posted in Folder 7, VTA Program Knowledge Center

Veterans Tracking Application (VTA) Reminders

VTA move to Salesforce
VTA is moving to Salesforce (SF) with a projected Go-Live date of November 6, pending testing. Over the last year or so the Pre-Discharge Staff, DoD and SF programmers have been conducting weekly meetings, writing requirements, re-programming and testing to ensure a smooth transition. All data to include user profiles (enabled and disabled) will be transferred to SF. Re-registration will not be required and users will continue to sign-in with PIV/CAC. Training dates are planned for mid-late October and information on that training will be sent ASAP.

Upcoming Conference Calls

The next BDD/IDES Call is scheduled for **Tuesday, November 14, 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 October 25, 2023.

Open Floor

Choose VA

VA | U.S. Department of Veterans Affairs

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

Question: Regarding the Re-Scheduling Exam topic. Please clarify the documented requirement from PEBLO for re-scheduling exams. M21 only says note in VTA by the MSC. The call said evidence needed in VBMS. Is that true or is VTA note sufficient?

Answer: Currently a VTA note is all that is required. If more evidence is needed, we will update the M-21 reference.

Question: Had a SM tell me she received the rating Code sheet from the PEBLO. I thought SMs were not supposed to get the Code sheet?

Answer: Per the M-21 they are not supposed to get the Code sheet. We have reminded the Service PEBs to not provide the Code sheet to the PEBLO.

Question: We received a case, and the SM informed the MSC that they were going on leave in about 35 days. We returned the case, but the MTF objected because the SM was available for the first 30 days (per the M-21). After some back and forth the MTF agreed to remove the Prepare Claim Start Date (PCSD), put in deferment, and take the case back, but was not happy about it. What do we do in situations like this?

Answer: See Holiday Leave and SM Availability during the Claims Development and Examination Phases topic above.

Question: Will there be VTA Sales Force training?

Answer: Yes. The Pre-Discharge staff is working details and plan is to have training mid-late October. Once finalized, schedule will be released.

Question: Can MSCs request exam for a BDD claim without an entrance exam?

Answer: Please see link below for guidance on BDD entrance exams.
https://vbaw.vba.va.gov/VBADOD/docs/IDES/bdd-entrance-exams-interim-guidance.pdf

Question: What is the TMS number for the September call?

Answer: The TMS Number is #4648972

Question- Please provide the guidance for eSTR for BDD claims?

Answer: See Interim guidance provided above in the BDD Claims Processors eSTRs Responsibilities (During the 120-Day Ramp-Up Period) Topic. The guidance is also available on the Compensation Service Interim Guidance intranet site and will be available on the Pre-Discharge Programs intranet site.

Question- What is the proper guidance for Capri Enterprise Search?

Answer: The manual reference regarding CAPRI enterprise search requires a permanent VBMS note if no records are found. Screenshots are not required, however, if you want to include them, it is acceptable.

M21-1 III.ii.1.A.2.g. Conducting an Enterprise Search in CAPRI
When a Veteran does not identify treatment at a specific VA facility, ROs must perform an enterprise search in CAPRI, and associate any relevant records with the claims folder. If the search results do not show any VAMC treatment add a permanent note to the appropriate claims processing system documenting the results.
Important: When the enterprise search indicates the claimant has treatment at the CERNER (200CRNR) – Medical Record Exist "facility," follow the special procedures, as indicated in M21-1, Part III, Subpart ii, 1.A.2.c and d.
Quality Assurance has provided this guidance to AQRSs regarding screenshots in lieu of VBMS notes- Quality reviewers must utilize VA laws, regulations, and procedures when evaluating if the employee under review completed all required actions.
Currently, M21-1 III.ii.1.A.2.g., Conducting an Enterprise Search in CAPRI, stipulates the proper way to document a negative enterprise search is by adding a permanent note in VBMS documenting the results of the search.

Question: Permanent vs Temporary Notes in VBMS

Answer: <u>Temporary</u> notes can only be associated to a claim and will be automatically deleted when the claim is closed or completed. You can view temporary notes if you are the user who added the note, the user assigned to the work item, or a supervisor. Only supervisors or the user who created a note can edit or delete it.
<u>Permanent</u> notes can be associated to a Veteran or to a claim. If you create a permanent note, you can edit it until midnight (EST) of the day you created it. After that time, permanent notes become part of the Veteran file and are subject to the Freedom of Information Act.

See page 283 of VBMS User Guide for more info.
Question: When should I reach out to Vendors when exams are delayed?

Answer: Please reach out to your Exam Liaison to assist with delayed exams. If you still need help you may also reach out to the <u>MDEO Mailbox</u> and Cc the <u>IDES Mailbox</u> or <u>BDD Mailbox</u>.

Question- Do I need to date stamp electronic documents?

Answer: MSCs are reminded, no wet-ink date stamp or CEST annotation is required on IDES applications that are submitted electronically. The date of receipt of these documents will be captured electronically when documents are uploaded to the VBMS eFolder. It is helpful to all, if MSCs also add a VBMS note regarding how documents were received.

ChooseVA

VA | U.S. Department of Veterans Affairs

III.i.2.D.3.m.
Capturing the Date
of Receipt of
Electronic
Documents

When documents are provided electronically, the MSC must ensure that the date of receipt is accurately recorded in VBMS. When uploading documents in VBMS, the MSC must make certain that the DATE OF RECEIPT field on the UPLOAD DOCUMENT screen, accurately reflects the date the document first came into VA possession.

Reference: For instructions on uploading documents into the eFolder, see the *VBMS Job Aid - Adding Documents in VBMS eFolders*.