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 November 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 [Calendar Subscriptions (va.gov)](https://gcc02.safelinks.protection.outlook.com/?url=http%3A%2F%2Fvbacoweba5.vba.va.gov%2Fbl%2F21%2FCalendar%2Fcal_Subscribe.asp&data=05%7C01%7C%7C21879ad3ed524078df7108dbb3930978%7Ce95f1b23abaf45ee821db7ab251ab3bf%7C0%7C0%7C638301216315397959%7CUnknown%7CTWFpbGZsb3d8eyJWIjoiMC4wLjAwMDAiLCJQIjoiV2luMzIiLCJBTiI6Ik1haWwiLCJXVCI6Mn0%3D%7C3000%7C%7C%7C&sdata=IblMTyApGDJdc7op5Ca6KMk320%2FdtSPPk7tkR9h7IvM%3D&reserved=0) to receive notification that the R/A is available and for notification when the TMS number is active.

General Topics 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. 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.

BDD Reminders

**Benefits Delivery at Discharge (BDD) Exam Automation Functionality**

**Target Audience**: Claims processors involved in the initial development of BDD claims, including, but not limited to VSRs, RVSRs, and MSCs.

**Background:**Effective December 18, 2023, Automated Benefits Delivery (ABD) will begin a limited initial release of automation functionality that will prepare draft examination requests for BDD claims received via VA.gov. Automation will prepare a draft examination.

**What is changing?** When requesting BDD examinations (as indicated in [M21-1, X.i.6.C.1.b., Step 11](https://vaww.vrm.km.va.gov/system/templates/selfservice/va_kanew/help/agent/locale/en-US/portal/554400000001034/content/554400000177951/M21-1-Part-X-Subpart-i-Chapter-6-Section-C-Division-of-Responsibilities-Benefits-Delivery-at-Discharge-BDD-and-BDD-Excluded-Claims%3FarticleViewContext%3Darticle_view_related_article?query=IDES))claims processors may see an *Exam Scheduling Request (ESR)* in VBMS that was prepared by Automation. The ESR will be in a DRAFT status as shown in Figure 1 below.

The draft exam will include the SHA DBQ and any required specialist DBQs. Claim processors must review the draft exam request for accuracy and completeness and make any required changes or updates prior to finalizing request. For example, the draft ESRs prepared by Automation will **not** include medical opinions nor any language required by the [Supplemental Language Matrix](https://vaww.vrm.km.va.gov/system/templates/selfservice/va_kanew/help/agent/locale/en-US/portal/554400000001034/content/554400000105052/Supplemental-Language-Matrix%3FarticleViewContext%3Darticle_view_related_article?query=Supplemental%20language%20matrix). Claims processors must consider the potential need for these and/or any other exam requirements. The draft ESR must be opened and edited by selecting *Edit Request* from the Actions dropdown, if required.

When the ESR is deemed to be accurate and complete, the claims processor must finalize/submit the request in VBMS and continue to process the claim in accordance with standard BDD procedures. When all development is complete, the EP 336 must be updated to the appropriate rating EP ([M21-1, Part X, Subpart i, 6.B.2.d.](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)), to effectuate recall/distribution by NWQ, per standard practice.

**Figure 1.**

**Where is it changing?** Nationally. During the initial release period, a maximum of 30 claims per day will have automated draft exams and the draft exams may be applied to **any** BDD claim around the country.

**What else do I need to know?**

* Claims will be routed to RO 398 while automation activity is underway; automation activity is anticipated to take up to 48 hours. Claims processors should take no action on BDD claims that are pending at RO 398. Upon completion of automation activity, BDD claims with draft exams will be routed to the SOJ for processing.
* The BDD claims with draft exams must be processed in accordance with standard BDD procedure. Claims processors must complete all required BDD claims processing activity in compliance with [M21-1 Part X, Subpart I, Chapter 6 Sections A-D](https://vaww.vrm.km.va.gov/system/templates/selfservice/va_kanew/help/agent/locale/en-US/portal/554400000001034/topic/554400000020823/Chapter-06-Pre-Discharge-Claims), and all [Compensation Service Interim Guidance](https://vbaw.vba.va.gov/bl/21/rating/guidance.htm) with applicability to BDD claims.
* This automation activity is limited to draft exams. It will not include other documents associated with other types of automation claims, such as the Automated Review Summary Document (ARSD).
* Specialist DBQs will be selected as determined by the automation logic. **Note**: Automated draft exams for Mental Conditions and Hearing Loss have been previously released nationally, however, other conditions related to specialist eye exams have not previously been released nationally.
* Automated draft exams will only be applied to claims received through VA.gov; it will not be applied to manually established BDD claims.

IDES Reminders

**SM Availability During the Claims Development and Examination Phases**

This guidance is always relevant, but more so during the holiday season. MSCs are reminded to inquire about approved leave (non-emergency) during the initial interview that could interfere with the IDES process, specifically exams. If the SM indicates he or she has approved leave within the first 30 days after the Prepare Claim Start Date (PCSD) that would prevent them from attending exams, the MSC should return the referral to the PEBLO as an improper referral, remove the PCSD, and add note. Cases where SMs have approved leave after day 30 will not be returned and regular case processing will begin. 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 rescheduled 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.

Veterans Tracking Application (VTA) Reminders

No New Exams Needed checkbox on MSC Tab

MSCs are reminded to use this checkbox when no new exams are needed due to a rating being done from evidence of record and STRs and/or a BDD claim that is now IDES or other reasons. Example. Here is a VTA note from an MSC; “MSC is not requesting IDES exams for this member as all exams to include referred conditions were completed during the BDD process; all DBQs are in VBMS”.

The MSC should have checked the checkbox in this example, not enter the dates of the BDD exams. This caused dates to be out of sequence.

VTAs move to Salesforce (SF) and Q & A

VTA moved to SF (VTA 2.0) on December 11, 2023. Training has been assigned in TMS and Comp Service Brown Bag sessions will continue thru Friday, December 15, 2023.

Upcoming Conference Calls

The next BDD/IDES Call is scheduled for **Tuesday, January 9, 2024**, 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 December 20, 2023.

Note: A new invite will be sent for 2024. This call will continue to be on the 2nd Tuesday of the month at 2ET.

Open Floor

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

**Question**: Will there be training involved with VTA 2.0 to include training materials?

**Answer**: Recordings have been produced with step-by step instructions that will be available in TMS. Additionally, materials (videos, PPT and a guide) are available in Folder 6, pages 7/8 in the VTA Knowledge Center.

**Question**: Will the PEBLOs still be able to update the Service members duty status in VTA 2.0?

**Answer**: Yes, the PEBLO will be manually updating the Service members’ duty status.

**Question**: When you save in VTA 2.0, you said you will not be able to see what you saved. How do you check that the data was saved.

**Answer**: The system is built to save it, but you will not get a pop up saying that “your data was saved”. If you notice any issues with saving the data, send an email to the IDES mailbox.

**Question**: Will old VTA be phased out completely?

**Answer**: Yes, legacy VTA will sunset approximately 30-45 days after VTA 2.0 goes live.

**Question**: How does VTA 2.0 streamline the job of a claims’ processor?

**Answer**: Claims processors will still have to input the data. There is currently no auto-populating from VBMS or any other system. However, reports are more robust in VTA 2.0.

**Question**: Will we be able to edit notes?

**Answer**: No, you will not be able to edit notes once you enter them.

**Question**: Will VTA 2.0 still be sending the same email notifications as legacy VTA?

**Answer**: Yes, users will receive the same email notifications.

**Question**: When you set up reports, is that a report that we can go in and edit (i.e., change the date) or will we have to redo the report every time?

**Answer**: Once you save the report into your folder, you can go in and run it anytime. It’s a little different than the user-defined reports in legacy VTA.

**Question**: Do we literally stop updating legacy VTA on December 4th and only update VTA 2.0? Do we have to do any double updates to keep things in order?

**Answer**: Once VTA 2.0 goes live you will only need to update VTA 2.0.

**Question**: There is an issue with single sign-on on SalesForce in Chrome. If Edge goes down is there a tentative plan for VTA 2.0.

**Answer**: Please follow the same protocol for other single sign-on applications.

**Question**: It was said that we are authorized to update direct deposit information from the 526. Will we get an error if it is not entered?

**Answer**: You should not receive an error. However, MSCs/Public Contact personnel should enter the information during the initial contact/intake and document contact and confirmation of information on a 27-0820.

**Question**: When is quality going to stop calling errors on this (direct deposit) ?

**Answer**: The guidance was updated to address the issue. This is a recent change and if you’re seeing quality errors, please send this to our mailbox.

**Question**: Service members have been waiting 3 to 6 months for a specialty appointment (DoD) and vendors are scheduling regular appts at the same time. What should we be doing regarding the appointments?

**Answer**: (MDEO) IDES is working on a timeline and limited spaces. It’s going to be up to DoD to determine which is more appointment. We can only address the guidelines if the Service member does not go the appointment.

**Question**: It was said not to contact the contract vendor. However, I am sending an email to ask if they will cancel all exams if the SM misses and appointment and the vendor is responding. Are you saying that we shouldn’t reach out.

**Answer**: (MDEO) Each RO has multiple exam liaisons on station designated to communicate with the vendors. Some MSCs are doing status checks and not just addressing a single issue. The vendors are not staffed to answer multiple inquiries from every MSC/claims processor. This is why exam liaisons are the designated representatives.

**Question**: Has there been any feedback on VES providing all the appt times? We currently do not get appointment times for their diagnostic appointments.

**Answer**: (MDEO) – We are currently working with VES on this very issue.