

Monthly Compensation Service Pre-Discharge Programs (219)
Benefits Delivery at Discharge (BDD) and Integrated Disability Evaluation System (IDES)
Conference Call Read Ahead
February 13, 2024, 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 January 2024 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 (New beginning Feb 24)

Microsoft Teams meeting

[Click here to join the meeting](#)

Meeting ID: 228 636 845 446

Passcode: oJhBDy

Or call in (audio only)

[+1 872-701-0185,,205533754#](#)

Phone Conference ID: 205 533 754#

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 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.

Contacting the Pre-Discharge Staff

IDES Mailbox: For IDES or VTA policy/procedural questions.

BDD Mailbox: For BDD policy/procedural questions.

VTA Mailbox: For VTA technical issues.

Note: As stated above, all VTA technical issues should be sent to the VTA Mailbox. Do not call or submit a ticket thru the National Service Desk.

SAVE THE DATE: April/May 2024 Military Services Coordinator (MSC) Symposiums

The Compensation Service, Pre-Discharge Staff will host two FY24 MSC Symposium sessions. Currently, the MSC Symposium sessions are planned as in-person events for MSCs and MSC Supervisors.

The symposium will be an opportunity for Central Office leadership, CS Pre-Discharge Staff, MSCs and MSC Supervisors to exchange ideas, share best practices and allow face-to-face interaction between all stakeholders from various locations. The Office of Field Operations (OFO) will coordinate with District and Regional Offices to arrange MSC and MSC Supervisor attendance. MSCs and MSC Supervisors should receive notification and further information via those channels.

The first symposium session is tentatively scheduled for **April 23-25, 2024, travel days are April 22 and 26, 2024**. The second symposium session is tentatively scheduled for **May 7-9, 2024, travel days are May 6 and 10, 2024**. MSCs and MSCs supervisors will only be required to attend one session. The location is to be determined.

The symposium planning is tentative based on the Continuing Resolution (CR). All details are subject to change.

Please send your MSC Symposium topic ideas to the [Pre-Discharge Programs mailbox](#) NLT CoB February 16, 2024.

Direct Deposit Information

Per the guidance in [M21-1,II.iii.3.B](#), Service members (SM) in Pre-Discharge claim programs may contact an MSC or other VA Pre-Discharge (BDD), BDD-excluded or IDES intake site employees to establish or update direct deposit information.

However, the evidence of record must show contact was made with the Pre-Discharge intake site employee or one of the below conditions are met before the direct deposit information can be entered or updated in VBMS.

1. Service member submits a voided check or deposit slip,
2. SM provides direct deposit information in person at a Pre-Discharge intake site (MSC must enter a VBMS note or upload a 0820 showing the claim was received in person and direct deposit information was verified as correct),
3. Contact the SM and verify that the submitted direct deposit information is correct. This contact must be documented on a 27-0820 and uploaded to the eFolder. If the SM cannot be contacted to confirm the direct deposit information, send an *Invalid Direct Deposit Update* letter to the SM, but **do not** update any of the direct deposit information in VA systems
4. SM submits the [Standard Form 1199A, Direct Deposit Sign-Up Form](#) or the [VA Form 20-572](#).

SHA Contention Requirement for Exam Requests

The Pre-Discharge Staff received an inquiry regarding the following guidance put out on the March 2023 BDD/IDES call.

Actions to take if Part A is Received

Claims processors will be responsible for making sure Part A is present in the eFolder prior to requesting the SHA examination.

If Claim is BDD and...	Then the claims processor must ...
<ul style="list-style-type: none"> • the <i>Separation Health Assessment - Part A Self-Assessment</i> is present 	<ul style="list-style-type: none"> • ensure the document is indexed per M21-1, II.ii.2.A.1.d and denote “SHA Part A” in the Subject field and use “Medical Records: Disability Benefits Questionnaire (DBQ) - Veteran Provided” for the Document Category - Type: <div data-bbox="926 1070 1276 1432" style="border: 1px solid #ccc; padding: 5px; margin: 10px 0;"> </div> • identify form as relevant evidence for the examiner’s review per M21-1, IV.i.2.A.8.d. • make an entry of “SHA Part A is in eFolder” within the “Additional Information” section of the first contention when creating the Exam Scheduling Request.

If Claim is BDD and...	Then the claims processor must ...
<p>If Claim is IDES and...</p> <ul style="list-style-type: none"> the <i>Separation Health Assessment - Part A Self-Assessment</i> is present in the IDES referral packet 	<p>Then the claims processor must ...</p> <ul style="list-style-type: none"> ensure the document is indexed per M21-1, II.ii.2.A.1.d and denote “SHA Part A” in the Subject field and use “Medical Records: Disability Benefits Questionnaire (DBQ) - Veteran Provided” for the Document Category - Type: <div data-bbox="877 486 1222 852" style="border: 1px solid #ccc; padding: 5px; margin: 10px 0;"> <p>Properties ✕</p> <p>Editable Properties</p> <p>Subject: <input type="text" value="SHA Part A"/></p> <p>*Receipt Date: <input type="text" value="03/09/2023"/></p> <p>*Document Category - Type: <input type="text" value="Medical Records: Disability Benefits Questionnaire D"/></p> <p>View All</p> <div style="border: 1px solid #ccc; padding: 2px;"> <p>Medical Records: Disability Benefits Questionnaire (DBQ) - Veteran Provided</p> </div> </div> <ul style="list-style-type: none"> identify form as relevant evidence for the examiner’s review per M21-1, IV.i.2.A.8.d. make an entry of “SHA Part A is in eFolder” within the “Additional Information” section of the first contention when creating the Exam Scheduling Request.

The Pre-Discharge Staff confirmed with the Medical Disability Evaluation Office (MDEO) that these actions are still required for all ESRs.

BDD Reminders

BDD eSTR Claim Processor Guidance

BDD claims processors should continue to follow the interim procedures listed below for processing BDD claims until further notice:

If	Then
Current period STRs were provided by the Service member	<ul style="list-style-type: none">Request VA examinations as directed in M21-1 X.i.6.C.1.b
Current period STRs were received via eSTRs transfer	<ul style="list-style-type: none">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	<ul style="list-style-type: none">Enter “Awaiting STR Auto Receipt” tracked item andEnter 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	<ul style="list-style-type: none">Develop for current period STRs per M21-1 X.i.6.B.3.k

This interim guidance was updated on January 31, 2024, links are below.

- [Interim Guidance Intranet Page \(va.gov\)](#)
- [BDD and eSTR Interim Guidance.docx](#)
- [BDD Homepage](#) under What’s New, [BDD eSTRs Interim Guidance - January 31, 2024](#)

IDES Reminders

Ordering Missing/Required Exams after Entering the Medical Evaluation End Date (MEED) and Transferred to DRAS Date

Reminder, MSCs should not order additional exams after entering the MEED and the Transfer to DRAS Date. Some MSCs are ordering additional exams after these dates are entered without removing them, and not requesting case transfer back to the MSC. When MSCs order exams when the case is at the DRAS, this action causes VBMS (changes the claim status from RFD to OPEN) and VTA data issues. Contact the [IDES Mailbox](#) if needed for guidance.

Notes:

- When the DRAS determines additional exams are needed during their exam review, they will order the exam(s). The MSC will NOT make VTA updates for DRAS requested/completed exams (a note can be entered).
- Some cases with this scenario (example: exams for new referred condition) may need to be disenrolled per [M21-1,X.i.6.K.1.](#)

Return of VA Form 21-526EZ and List of Examinations Requested to PEBLO

MSCs are reminded that SMs must complete a VA Form 21-526EZ to initiate a claim for VA Benefits. Per [M21-1, Part X, Subpart i, 6.F.1.d](#), MSCs must return a copy of the completed VA Form 21-526 EZ (or notice that the participant declined to submit a VA claim, if applicable), and a list of examinations requested after the exams have been ordered to PEBLO.

Veterans Tracking Application (VTA)

VTAs Transition to Salesforce (SF)

VTA transitioned to SF on December 11 (<https://va-vet.lightning.force.com/lightning/page/home>). We are working reported issues ASAP. Any VTA technical issues (details and screen shot) should be sent to the [VTA Mailbox](#).

Notes:

1. With the transition to SF, VTA Admins (Michelle/Andy) lost many of the Admin privileges previously held in legacy VTA and most actions are now done by the Digital Transformation Center (DTC), which take longer to complete. VTA Admins are part of the [VTA Mailbox](#) and will support when they can.
2. When the call is officially over there will be a VTA 2.0 Q&A session for those that want to stay on.

VA Employees Requiring VTA Access

Until further notice, VA employees that require VTA access will send an email to the [VTA Mailbox](#) and include the following: name, email, phone number, VARO and all MTFs supported by the VARO (if VBA), VAMC and VISN (if VHA), role/position and a short statement on why access is needed.

Exit Interviews and Auto-generated Email from VTA

The auto-generated emails sent to MSCs notifying them that an Exit Interview is due currently is not fully functional in VTA and is being worked. MSCs who are not receiving this email, please ensure you are running your Pending Exit Interview Report at least 1-2 times a week.

Note: The Exit Interview Pending Report was recently run and there were over 300 cases pending over 14 days. 144 of the cases were \geq 50 days. Please run this report and complete these interviews ASAP.

Upcoming Conference Calls

The next BDD/IDES Call is scheduled for **Tuesday, March 12, 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 February 21, 2023.

Open Floor

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Appendix 1: Call Notes from the January 2024 BDD/IDES Conference Call

Question: A question was asked about MST claims and whether they should be triaged to San Juan.

Answer: BDD and BDD excluded claims do not require MST processing or brokering and can be processed without stressor-verification [M21, X.6.B.3.g.](#) for BDD and [M21, X.i.6.E.4.c.](#) for IDES. The MSC can inform the RO Coordinator about the case.

Question: For BDD claims should VSRs and RVSRs wait to order exams without STR certification memo. Is there a reference that says they can order exams without the memo?

Answer: It is not necessary to wait for the certification memo to request exams. BDD claims are based on the current period of service STRs. It is nice to have the STR certification memo, but it is not required. We do not have a reference regarding the certification memo.

Question: Can an SHA be used for a non-BDD and IDES claim 010 and 110?

Answer: If an SHA has already been completed for a BDD or IDES claim it should be sufficient for exam purposes, the RVSR would determine if additional exams are needed.

Question: Do BDD Excluded claims go to the contractor for exams?

Answer: MSCs should use the ERRA tool when requesting exams.

Question: On the March 2023 call it was stated that we are to include a note regarding the SHA? Do we still need to put a note in the system?

Answer: MSCs are still required to follow the guidance of inputting a note in the first contention in VBMS stating the SHA is available. The Pre-Discharge Staff spoke with MDEO, and they confirmed the note is still required, since the contractors do not have the same level of access to VBMS as the field does.

Question: How often are we updating the manual to reflect the changes discussed on the calls?

Answer: Changing the manual is a lengthy process. Currently, we have double digit pending changes. Interim guidance is sufficient for quality concerns. MSCs can also use the Pre-Discharge page as a reference until the manual is updated.

Question: A question was asked whether the CAPRI search should be completed when the exams have not been returned for 6 months.

Answer: The Pre-Discharge Staff is still discussing this issue and will address it on the next call. For the time being it is probably a good idea to complete an additional CAPRI enterprise search if significant time has passed.