

Monthly Compensation Service Pre-Discharge Programs (219)
Benefits Delivery at Discharge (BDD) and Integrated Disability Evaluation System (IDES)
Conference Call Read Ahead
June 11, 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 May 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 2024)

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 IDDES 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 IDDES 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.

MSC SharePoint Site

MSC Coaches/Supervisors are reminded to keep their BDD and IDES info updated on the MSC SP Site. Contact Andrew.Reese@va.gov if needed.

[Pre-Discharge Programs MSC Info \(SharePoint\)](#)

MSC Teams Chat

The BDD/IDES Monthly call chat is for questions, discussions, and collaboration with your fellow MSCs or other VA personnel (MDEO, DRAS, others).

Please refrain from negative comments/criticism. (Ex. Vendor X is horrible). Thanks for your cooperation.

Entering Contentions

This guidance was confirmed by the CS Quality Assurance staff, per [M21-1, III.i.2.F.2.a, Identifying Contentions](#), enter each issue as a separate contention and enter it the same as how the SM claimed it on their 526EZ. Therefore, if the SM claims left knee and right knee conditions, they should be entered separately and not as bilateral knee conditions unless the SM specifically claims the condition on the 526EZ as, “bilateral”.

IDES Topics

Exam Reschedule Policy

MSCs are reminded of [M21-1, X.i.6.F.3.k](#), Handling an IDES Participant’s Request to Re-schedule an Examination. We are getting reports from MDEO that PEBLOs are contacting the vendors and bypassing the MSCs and/or MSCs are telling PEBLOs to contact the vendors. Per policy/guidance, the MSC contacts the vendor.

Veterans Tracking Application (VTA)

VTAs Transition to Salesforce (SF)

We continue to work through issues/concerns with VTA 2.0. Users are encouraged to report any technical issues they encounter to the [VTA Mailbox](#). Please provide details (screenshots, case #, the tab/data field that is causing the issue, other).

Exit Interview Start Date Data Field

We recently identified this data field was editable and it should not be. Field is supposed to be updated to read only on completion of the Monday, June 10 VTA update. The field auto-populates with the date the Final Disposition Date is entered and starts the 14-day clock to complete an Exit Interview.

Exit Interview Pending and Completed Reports

We recently identified calculation issues with these reports. The calculations are supposed to be corrected on completion of the Monday, June 10 VTA update.

Upcoming Conference Calls

The next BDD/IDES Call is scheduled for **Tuesday, July 9**, 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), Monday June 24.

Open Floor

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

Question: Do we still need to add the digestive supplemental language to the examination scheduling request (ESR)?

Answer: MDEO confirmed that the digestive supplemental language is only required to be added to the ESR if the date of claim (DOC) is **BEFORE** May 19, 2024. As a reminder, the DOC for IDES referrals is the prepare claim start date and the DOC for BDD and BDD-excluded claims is the day after the future discharge date. Even if the submission of the claim is prior to May 19, 2024, if the DOC is **AFTER** May 19, 2024, then the digestive supplemental language is not required.

Question: Do we still have to identify the SHA Part A as relevant evidence for the examiners review per [M21-1, IV.i.2.A.8.d](#) and enter it as additional information on the ESR?

Answer: MDEO confirmed that both actions are still required. The SHA Part A must be identified as relevant evidence for the examiners review per [M21-1, IV.i.2.A.8.d](#). Also, "SHA PART A is in the eFolder," must be entered in the additional information section of the first contention when creating the ESR.

Question: IRT to VTA data fields of Exam End Date, MEED and Transferred to DRAS Date. At our location we have an agreement with the MTF not to enter the MEED after a certain hour, but we do enter the Transfer Date. Is this ok or should we wait and enter the two dates at same time/date.

Answer: The MEED and Transferred to DRAS Date should be entered on the same day.

Question: IRT to VA Form 21-686c.

Answer: If an outdated VAF 21-686c is handed out and subsequently accepted by an MSC, it cannot be accepted as a proper claim for dependents (e are specifically addressing dependents in this reminder- since we are not generally establishing a claim (EP 130) for dependents, but the dependents are being added to the pre-discharge claim).

Once it is noticed by any claim's processor that the MSC accepted an outdated VAF 21-686c, the procedure is to follow the Request for Application procedures as noted in M21-1 II.iii.2.G.1.a. and remove the dependents as contentions from the pre-discharge claim. Once proper form is received, the dependents may be added as contentions and considered for possible additional benefits for the claimant.

The only time an MSC may accept an outdated VAF 21-686c is if the service member submitted it via one of the VA approved claim submission websites (VA.gov, etc.) or other VA system that includes form-generation capacity. Claim labels and document properties in VBMS will clearly denote the source of the submission. (M21-1 II.i.2.B.4.a). Therefore, the reference for this was included in the read-ahead.

Question: When should we change the BDD EP 336 to a rating EP, before or after the exam request?

Answer: Please see the below M21-1 reference.

[X.i.6.C.1.d. Actions to Take in VBMS When Required Development Actions Are Complete](#)

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
- ensure all pending tracked items have the proper suspense dates
- update tracked items according to [M21-1, Part III, Subpart i, 2.F.3](#)
- change the diary EP 336 to the proper rating EP and *BDD* claim label, as noted in [M21-1, Part X, Subpart i, 6.B.2.d](#), and
- ensure the claim is in open status unless the claim has already been determined to be RFD.

Question: I know of several ready for decision MST claims that are past discharge and service has been verified but have not been rated. Is there anything we can do?

Answer: Yes, please send the name and SSN to the [BDD Mailbox](#).

Question: Does the language in [M21-1, VIII.iv.1.B.2.e](#) need to be sent to all PTSD claimants or just MST claimants?

Answer: The information in [M21-1, VIII.iv.1.B.2.e](#) should only be sent to MST claimants.

Question: Will the MDEO exam contract vendor reject the MST ESR if it does not contain the MST medical opinion?

Answer: No, the exam contract vendor should not reject the ESR or send a clarification request asking for the MST medical opinion. If the vendor does reject the ESR or send a clarification request asking for the MST medical opinion, send the name, SSN and details of the issue to the [MDEO Contract Exam Inquiries Mailbox](#) and copy the [BDD Mailbox](#).

Appendix 2: MSC Symposium (2024) Quality Questions/Answers (except Gulf War)

Direct Deposit

Question: Regarding EFT entry by the MSC, this guidance has been changed several times. I had a VSR contact me today via team to call the SM to verify EFT that I entered but when I conducted the initial interview it was not required which was 10/2023. How are we as MSC to handle claims prior to this current update which we received on BDD/IDES call Feb 2024. This specific case I am referring to is currently at DRAS, completing the finalized award letter. Please advise.

M21-1 Prologue states “When employees handle a claim, they are expected to take the most full and complete action possible on the claim each time that it is assigned for action – including development, rating, and promulgation actions – so that the claim moves forward to accurate completion in the claims process. Every effort should be made to move the claim to the next processing cycle each time it is handled.” Please see also M21-1 II.iii.3.B.1.a. *Receiving Valid Notice of a Change of Contact or Direct Deposit Information* as it says, “Update addresses, other contact details, and direct deposit and payment information in Veterans Benefits Management System (VBMS) when possible.” Please see also the November 2023 IDES/BDD Call notes.

Question: I am trying to help find possible solutions when it comes to direct deposit update errors and wonder if we could somehow change the **online** VA Form 21-526EZ, so it **REQUIRES** attachment of direct deposit letter/slip or copy of voided check if any information is put in section 8, numbers 30-32? And perhaps in the future, the VA Form 21-526EZ could be modified? Maybe we could remove numbers 30-32 of section 8 from the claim form and have the claimant to either call VA, attach a direct deposit letter/slip or copy of voided check, or update the direct deposit information via VA.gov?

Thank you for these suggestions. Since this issue is not specific to Pre-Discharge claims or the Pre-Discharge Programs staff, please follow the guidance to submit this suggestion to your local management for submission to the proper staff.

SHA, Part A

Question: Per M21 the SHA Part A is now required as part of a good referral. In our last IDES call we were informed the vendor is unable to see the SHA, despite the note. We are still required to input "SHA Part A is in eFolder" when ordering exams. Will this be something that will soon be eliminated given it's required for a good referral? Please advise.

There is no change to the guidance at this time. Please see March 2023 IDES/BDD Call notes for a comprehensive chart of instructions regarding the SHA Part A and exam requests for IDES and BDD claims (please note: Vendors have limited document viewing capabilities and the guidance provided helps to prevent exam delays or clarification requests for this issue).

Question: If the vendors do not/cannot accept exams without the SHA part A, that means they see it and have it for the exam request, why do we still need to put in the exam. At minimum it should not be a critical error, - it does not affect the exam as the vendor has ID'd it and have it, so the exam goes on without issue?

There is no change to the guidance at this time. Please see March 2023 IDES/BDD Call notes for a comprehensive chart of instructions regarding the SHA Part A and exam requests for IDES and BDD claims (please note: Vendors have limited document viewing capabilities and the guidance provided helps to prevent exam delays or clarification requests for this issue).

Question: Why is the note in exam request under evidence required or needed? Why is that needed if we are already requesting SHA DBQ. Are they not aware that we have to SHA Part A of record prior to ordering exams? This I don't think should be a critical error since it does not delay or hinder the exam request.

There is no change to the guidance at this time. Please see March 2023 IDES/BDD Call notes for a comprehensive chart of instructions regarding the SHA Part A and exam requests for IDES and BDD claims (please note: Vendors have limited document viewing capabilities and the guidance provided helps to prevent exam delays or clarification requests for this issue).

New Mail Indicator

Question: I have cases where the mail is not resolved by mark as opened, looking in the archive and doing the same. I have even reached out to IT which often escalates it to tier 2 which often can also not resolve it. I have been putting a note into VBMS what has been completed and uploading the ticket number. Is this sufficient or should we be doing something else? Please advise.

In this situation, leaving a note is helpful. Please be specific about the dates of the mail that you have addressed. Please continue to contact IT for this (please note: Opening each document individually may be a work around for this issue).

This is a recommended best practice if the “mark as open” functionality is not working for you. Remember, reviewing exam documents for completeness is necessary for IDES claims as per M21-1 X.i.6.F.3.c. MSC Review of Examination Reports. For all claims, the following reference is applicable: M21-1 II.ii.2.A.1.a.VBMS New Mail Indicator.

IQRs

Question: Can you please provide a list of what constitutes a transaction for quality? I am aware that Cesting, exams, anything that creates a tracked item.

How are cases selected for IQR?

IQRs are assigned to stations on a national level. Performance Analysis & Integrity (PA&I) is responsible for selecting cases for review, which is based on distinct transactions. It is a random sample and local QRTs do not have any control of the type of work being selected for review.

What is a distinct transaction?

Distinct transactions represent a single count by claim, employee, day and category of transaction. Please keep in mind, a distinct transaction does not always result in a work credit. Transactions for MSCs are like VSR transactions, but for more information regarding transaction types for MSCs, please contact your local management.

Distinct Transactions for VSR and RVSR standard
Claims Establishment
Initial Development
Supplemental Development
Tracked Item Suspense Update
All Other Tracked Item Activity

Letter Printed Only
Ready for Decision
Return to Open
Rating Decision Complete
Rating Incomplete/Correction
Award
Authorization
Continued at Authorization
Closed (without Authorization/PCLR)
Cancelled
Returned by Other
Self-Returned
Deferral
Ready to Work
Suspense Update Only
Suspense Update, Co-Occurring with Other Activity

Question: Does an exam clarification response create a transaction?

Yes, as it corresponds to a tracked item.

Question: Does an address change and change in service create a transaction?

No, these actions alone do not create a transaction.

eSTRs

Question: EHR: Do we close TI for "auto STRs" if the SM provides their copy of STRs?

When a claim is established in VBMS, there is an automatic request for the STRs from HAIMS. (M21-1 III.ii.2.B.1.a. Automated STR Requests Based on Claims Establishment). If you have added the "Awaiting Auto STR Receipt" tracked item, allow it to remain open until you confirm all records received. See M21-1 III.ii.2.B.1.e. Status Messages Generated by VBMS for STR Requests to HAIMS for information on confirmation of receipt. but if you get the STRs from the current period from the Service member upfront and are not adding that tracked item, then you can order exams as per the guidance in the Feb 2024 IDES/BDD call notes.

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 Xi.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 Xi.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 Xi.6.B.3.k