#### Department of Veterans Affairs M21-1, Part III, Subpart i

**Veterans Benefits Administration July 31, 2015**

**Washington, DC 20420**

#### Transmittal Sheet

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| Changes Included in This Revision | The table below describes the changes included in this revision of Veterans Benefits Manual M21-1, Part III, “General Claims Process,” Subpart i, “Structure of the Veterans Service Center (VSC).” ***Notes***: * The term “regional office” (RO) also includes pension management center (PMC), where appropriate.
* Unless otherwise noted, the term “claims folder” refers to the official, numbered, Department of Veterans Affairs (VA) repository – whether paper or electronic – for all documentation relating to claims that a Veteran and/or his/her survivors file with VA.
* Minor editorial changes have also been made to
* update incorrect or obsolete references
* update the term “VCAA notice” to “section 5103 notice”
* update the term “notification letter” to “decision notice”
* update obsolete terminology, where appropriate
* remove references to specific claims-processing systems, where doing so does not affect the clarity of the instructions or information provided
* renumber each topic based on the standard that the first topic in each section is Topic 1
* reassign alphabetical designations to individual blocks, where necessary, to account for new and/or deleted blocks within a topic
* update section and topic titles to more accurately reflect their content
* clarify block labels and/or block text, and
* bring the document into conformance with M21-1 standards.
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| Reason(s) for the Change | Citation |
| To update instructions in notes sublabel for Step 6 of table concerning actions a Physical Evaluation Board Liasion Officer (PEBLO) should take on a “referral package.” | M21-1, Part III, Subpart i, Chapter 2, Section D, Topic 2, Block a(III.i.2.D.2.a) |
| To add Block b which contains a sample copy of the Service Department Memorandum of Complete and Current Service Treatement Records (STRs). | III.i.2.D.2.b |
| * To add the items a proper referral package includes to Step 2 of table.
* To provide information in Step 4 of table about initial interview completed within 10 days.
* To add embedded “If/Then” table in Step 5 about determining with Consolidated Veterans Records System (COVERS) if a claims folder was created by VA.
* To add embedded “If/Then” table in Step 6 to determine how to handle electronic STRs.
* To add Step 7 about establising end product (EP) 689 along with Important and Note bullets.
* To add Step 8 about annotating *VA Form 21-0819, VA/DoD Joint Disability Evaluation Board Claim*.
* To add Step 9 about assigning corporate flash.
* To add information in Step 11 about indexing values in the field along with reference along with reference for uploading documents in the eFolder.
 | III.i.2.D.3.a |
| To delete text of example about the PEBLO confirming the participant’s medical records are in transit. | III.i.2.D.3.c |
| * To delete instructions when a PEBLO determines STRs are unavailable and change to PEBLO submits a Service Department Memorandum of Complete and Current STRs.
* To add instructions concerning Military Records Specialists (MRS) responsibility of final attempt letter.
 | III.i.2.D.3.d |
| * To update table for Integrated Disability Evaluation System (IDES) participants with existing claims folders.
* To delete note prohibiting MSCs from using COVERS to request a claims folder.
 | III.i.2.D.3.e |
| To add a table with instructions for claims folders in Board of Veterans Appeals (BVA) custody. | III.i.2.D.3.f |
| To delete instructions in Step 7 of table concerning Notice Response and Note box discussing claims in paperless environment. | III.i.2.D.4.a |
| To delete old block titled “How Military Service Coordinators (MSCs) Obtain Signatures From IDES Participants That Met With Them by Video Conference or Telephone” and replace with new block titled “Completing Initial Interviews by Telephone or Video Conference.”  | III.i.2.D.4.d |
| To add block titled “Documenting Conditions Claimed During the Initial Telephone or Video Conference Interview.” | III.i.2.D.4.e |
| To add block titled “Obtaining the Participant’s Signature on *VA Form 21-0819*.” | III.i.2.D.4.f |
| To add block titled “MSC Actions When a Participant Does Not Immediately Sign and Return *VA Form 21-0819*.” | III.i.2.D.4.g |
| To add block titled “Handling Additional Claimed Conditions on *VA Form 21-0819* After the Five-Day Deadline.” | III.i.2.D.4.h |
| * To delete steps 2-4 of table concerning MSC actions immediately following the initial meeting.
* To add Important box in new Step 3 of table about actions to take if eFolder exists along with deleting Note box.
* To delete and add bullets in Notes box in Step 6 of table for actions an MSC does when receiving an Medical Evaluation Board (MEB) Referral Form.
* To add Veterans Benefits Management System (VBMS) reference in reference box.
 | III.i.2.D.5.a |
| To add block titled, “Handling Evidence Received When a Physical Claims Folder Does Not Exist.” | III.i.2.D.5.c |
| To delete obsolete reference to claims in paperless environment. | III.i.2.D.6.f |
| To add block titled, “Uploading Examination Requests Into the Claims Folder.” | III.i.2.D.6.g |
| To delete obsolete reference for claims in paperless environment. | III.i.2.D.6.i |
| To add text requiring the Rating Veterans Service Representative (RVSR) to notify the MSC of his/her findings within five days. | III.i.2.D.6.n |
| * To add block titled, “MSC Action Upon Return of Claims Folder From Exam Provider.”
 | III.i.2.D.7.b |
| * To update Step 1 in table with information to be updated on MSC tab in Veterans Tracking Application (VTA).
* To replace Steps 5-8 with Steps 3-7 in table with updated actions the MSC must take when examination reports are complete.
* To eliminate note in Step 9 in table concerning paperless claims processing.
* To update Step 10 in table concerning Permanently Transferring Out (PTO) a record.
* To replace Steps 11-12 in table with new instructions for transferring jurisdiction to the Disability Rating Activity Site (DRAS) along with notifying the DRAS.
 | III.i.2.D.7.d |
| To update instructions if an examination report reveals disabilities that weren’t claimed by VA or service department. | III.i.2.D.7.h |
| * To update instructions for disability other than a referred disability in table.
* To add important sublabel for MSCs to enter note in VTA along with adding a reference for failure to report for examination.
 | III.i.2.D.7.k |
| * To update directions for MSC to send additional evidence to the scanning site.
* To update directions in the table when new evidence is received in an electronic or paper format by the MSC.
 | III.i.2.D.7.l |
| To update reference for DRAS e-mail addresses and delete notes on paperless environment. | III.i.2.D.8.a |
| * To delete statement in Step 6 of table concerning paperless environment.
* To add bullet in Step 8 of table for uploading a letter
* To delete statements in Step 10 of table concerning paperless environment and green IDES folder flash.
* To update instructions in Step 11 of table for transferring jurisdiction the eFolder and deleting the embedded table.
 | III.i.2.D.9.a |
| To update the body of the letter to IDES participants whose service department returned them to active duty. | III.i.2.D.9.b |
| To delete note box in Step 6 of table concerning paperless environment. | III.i.2.D.9.d |
| To delete table and replace with updated information required on codesheet for a proposed rating decision, to include what DRAS RVSRs must select when entering a proposed rating decision into the Veterans Benefits Management System - Rating (VBMS-R). | III.i.2.D.10.i |
| To delete statement under important sublabel on instructions for DRASs for submitting documents. | III.i.2.D.10.j |
| To add table for actions to take when an error is identified in a proposed rating decision. | III.i.2.D.10.k |
| To delete sub-bullets on instructions for system updates following release of a proposed decision. | III.i.2.D.10.l |
| To add instructions that if a PEB submits a request for reconsideration that has not been initiated by the service member, then the PEB needs to be notified that no action will be taken. | III.i.2.D.10.o |
| To delete notes concerning outdated paperless environment instructions. | III.i.2.D.10.p |
| * To delete that an e-mail notification be sent to VAVBAWAS/CO/DES and replace with a note be recorded in VTA.
* To add a reference for information on post-separation revisions on IDES rating decision.
 | III.i.2.D.11.b |
| * To remove outdated paper based processing procedures and language.
* To delete reference about converting documents into an electronic format.
* To add note on actions to take when converting final rating decision.
 | III.i.2.D.11.c |
| * To delete notes in Step 1 and 4 of table concerning paperless environments.
* To delete and update instructions for important box in Step 3 of table concerning IDES benefit decision notices.
* To delete old Step 8 of table concerning paperless environments.
* To delete and update instructions in Step 9 of table concerning uploading documents to the eFolder along with adding references.
* To delete old Step 12 containing duplicate instructions for uploading documents to eFolder.
* To update instructions under important sublabel in Step 13 of table concerning transferring claims folder.
 | III.i.2.D.11.d |
| To add a note that if VTA cannot be updated due to disenrollment, then a note must be added in VBMS. | III.i.2.D.12.a |
| To update instructions on filing a subsequent claims and adding reference to III.ii.2.B for information on formal applications. | III.i.2.D.12.b |
| * To update the table with actions to be completed by DRAS when there is an eFolder.
* To delete reference for paperless environment.
 | III.i.2.D.12.c |
| To add a reference to III.ii.2.B to provide information on formal applications. | III.i.2.D.12.d |
| * To update instructions in Step 7 of table on submitting *VA Form 10-10EZ, Application for Health Benefits*.
* To add note about uploading documents to the participant’s eFolder if provided by the participant in PDF format.
 | III.i.2.D.12.e |
| * To update note bullets in Step 6 of table for instructions on sending forms to intake center along with updating reference with intake center information.
* To delete reference in Step 8 of table on converting paper documents into electronic format.
 | III.i.2.D.12.f |
| To add instructions that the MSC must update VTA to reflect completion of an exit interview. | III.i.2.D.12.g |
| To update instructions in the table by moving the instructions related to, “if the disability is unrelated to any disability the participant’s service department referred to VA,” and pairing them up with the instructions related to, “if the examination report suggests a disability may exist but does not include a diagnosis.”  | III.i.2.D.13.b |
| To delete instructions related to a DRAS Rating Veterans Service Representative (RVSR) who has determined that an existing examination report is inadequate for rating purposes. | III.i.2.D.13.c |
| To delete obsolete reference to claims in paperless environment. | III.i.2.D.13.d |
| To delete old Topic 26, “Processing IDES Cases in a Paperless Environment,” because these instructions no longer apply since all electronic IDES claims are now being processed in the VBMS. | III.i.2.D.26 (old) |
| To update instructions that a decision on an IDES claim is final and binding to include exceptions. | III.i.2.D.15.a |
| To delete reference to instructions on transferring jurisdiction of an eFolder. | III.i.2.D.15.d |
| * To add instructions in table concerning a pending appeal that involves a disability referred to VA and what actions the MSC and DRAS must take.
* To add instructions in table concerning a pending appeal that involves a disability claimed as a consequence being involved with IDES.
 | III.i.2.D.15.e |
| To add a reference to III.iv.3.A.1.b for information on routing examaintion requests. | III.i.2.D.16.b |
| To replace the hyperlink for the Planning Systems Support Group’s (PSSG) web page with a hyperlink for the Examination Request Routing Assistant (ERRA) Tool in Step 1 of table. | III.i.2.D.16.c |
| To update instructions in Step 10 of table concerning the PTO process related to a participant’s eFolder. | III.i.2.D.16.e |
| To delete obsolete reference to claims in paperless environment. | III.i.2.D.16.f |
| To update instructions for a DRAS deferral of a decision in a pregnant participant’s IDES claim to include deleting possible exceptions. | III.i.2.D.17.e |
| * To update Step 6 of table concerning the sending of an e-mail of proposed incompetency to a fiduciary hub.
* To add new Step 7 in the table on actions made by the fiduciary hub.
 | III.i.2.D.18.a |
| To add new Topic titled, “Ancillary Benefits for IDES Participants,” with the following blocks* “Handling Vocational Rehabilitation and Employment (VR&E) Claims from IDES Participants”
* “Actions DRAS Must Take Upon Receipt of VR&E Claim”
* “Service Member’s Eligibility for Home Loan Guaranty.”
* “Handling *VA Form 26-1880, Request for a Certificate of Eligibility*, Received From IDES Participants.”
* “Regional Loan Center (RLC) Action Upon Receipt of *VA Form 26-8937, Verification of VA Benefits, From a Service Member*”
* “DRAS Responsibility for Preparing Memorandum Rating Decisions, and”
* “DRAS Responsibility for Responding to a Request for an Eligibility Determination.”
 | III.ii.2.D.19 |
| To update the Benefits Estimate Letter (BEL) sample. | III.i.2.D.22.a |

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| Rescissions | None |

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| Authority | By Direction of the Under Secretary for Benefits |

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| Signature | Thomas J. Murphy, DirectorCompensation ServiceDavid R. McLenachan, DirectorPension and Fiduciary Service |

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