



Department of Defense MANUAL

NUMBER 1332.18, Volume 2

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Incorporating Change 1, Effective August 21, 2020

USD(P&R)

SUBJECT: Disability Evaluation System (DES) Manual: Integrated Disability Evaluation System (IDES)

References: See Enclosure 1

1. PURPOSE.

a. Manual. This manual is composed of several volumes, each containing its own purpose. The purpose of the overall manual, in accordance with the authority in DoD Directive 5136.01 (Reference (a)), is to implement policy, assign responsibilities, and provide procedures for the DES pursuant to DoD Instruction (DoDI) 1332.18 (Reference (b)).

b. Volume. This volume implements policy, assigns responsibilities, and provides procedures for using the IDES process to refer, evaluate, and return to duty, separate, or retire Service members for disability pursuant to Title 10, United States Code (Reference (c)).

2. APPLICABILITY. This volume applies to OSD, the Military Departments, the Office of the Chairman of the Joint Chiefs of Staff and the Joint Staff, the Combatant Commands, the Office of the Inspector General of the Department of Defense, the Defense Agencies, the DoD Field Activities, and all other organizational entities in the DoD.

3. POLICY. It is DoD policy in accordance with Reference (b) that the DES must be used for determining fitness for duty as well as determining return to duty, separation, or retirement of Service members because of disability. In accordance with Reference (c), the applicable standards for all determinations related to disability evaluation must be consistently and equitably applied to all Service members, both Active Component (AC) and Reserve Component (RC).

4. RESPONSIBILITIES. See Enclosure 2.

5. PROCEDURES. See Enclosures 3 through 9.

6. RELEASABILITY. Cleared for public release. This volume is available on the Directives Division Website at <https://www.esd.whs.mil/DD/>.

7. SUMMARY OF CHANGE 1. The change to this issuance updates references and organizational titles and removes expiration language in accordance with current Chief Management Officer of the Department of Defense direction.

8. EFFECTIVE DATE. This volume is effective August 5, 2014.


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Enclosures

1. References
2. Responsibilities
3. IDES Process
4. IDES Entity Procedures
5. TDRL Procedures
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ENCLOSURE 1

REFERENCES

- (a) DoD Directive 5136.01, “Assistant Secretary of Defense for Health Affairs (ASD(HA)),” September 30, 2013, as amended
- (b) DoD Instruction 1332.18, “Disability Evaluation System,” August 5, 2014, as amended
- (c) Title 10, United States Code
- (d) DoD Instruction 6130.03, “Medical Standards for Appointment, Enlistment, or Induction in the Military Services,” May 6, 2018
- (e) DoD 5400.11-R, “Department of Defense Privacy Program,” May 14, 2007
- (f) Title 38, Code of Federal Regulations
- (g) Public Law 106-475, “Veterans Claims Assistance Act of 2000,” November 9, 2000
- (h) Section 7332 of Title 38, United States Code
- (i) Office of the Chairman of the Joint Chiefs of Staff, “DoD Dictionary of Military and Associated Terms,” current edition
- (j) DoD Manual 6025.18, “Implementation of the Health Insurance Portability and Accountability Act (HIPAA) Privacy Rule in DoD Health Care Programs,” March 13, 2019

ENCLOSURE 2

RESPONSIBILITIES

1. ASSISTANT SECRETARY OF DEFENSE FOR HEALTH AFFAIRS (ASD(HA)). Under the authority, direction, and control of the Under Secretary of Defense for Personnel and Readiness (USD(P&R)), the ASD(HA):

a. Oversees the development and execution of the policies and procedures, in coordination with the Assistant Secretary of Defense for Legislative Affairs, for the IDES, as specified in References (b) and (c) and in this manual.

b. Determines IDES disability examination funding requirements in coordination with the Military Departments and the Department of Veterans Affairs (VA), and tracks IDES disability examination funding expenditures.

c. Recommends to the USD(P&R), in coordination with the Deputy Assistant Secretary of Defense for Warrior Care Policy (DASD(WCP)); Secretaries of the Military Departments; Under Secretary for Benefits, Veterans Benefits Administration (VBA); and Under Secretary for Health, Veterans Health Administration (VHA), changes in IDES policy, procedures, resources, and legislation. These recommendations ensure Service members who are referred to the IDES receive a single set of disability examinations performed to VA standards by qualified disability examiners. The examinations will include a disability examination plus any other applicable examinations required to assess the Service member's referred and claimed condition(s).

d. Monitors and assesses the impact of changes to the statutes, laws, and regulations of VA on the Department of Defense's application of the Department of Veterans Affairs Schedule for Rating Disabilities (VASRD) and in accordance with DoDI 6130.03 (Reference (d)) to Service members in the IDES.

e. Issues timely guidance to the Military Departments in response to changes in the statutes, laws, and regulations pertaining to DES.

f. Through the DASD(WCP), oversees, assesses, and reports on the performance of the IDES to the USD(P&R).

2. ASSISTANT SECRETARY OF DEFENSE FOR MANPOWER AND RESERVE AFFAIRS (ASD(M&RA)). Under the authority, direction, and control of the USD(P&R), the ASD(M&RA):

a. Ensures that IDES policies are applied to RC personnel in a manner consistent with AC personnel.

b. Reviews annual IDES performance with regard to the RC and provides the DASD(WCP) with recommendations to ensure the IDES process is efficiently and equitably applied to RC.

3. SECRETARIES OF THE MILITARY DEPARTMENTS. The Secretaries of the Military Departments, for their respective Departments:

a. Establish procedures to:

(1) Use the proposed VA disability ratings for each of the military unfitting conditions to determine the individual and combined DoD disability rating for all military unfitting conditions. Military Departments will adhere to Reference (b), DoD 5400.11-R (Reference (e)), and applicable DoD policy to implement the VASRD as presented in Enclosure 4 of Volume 1 of this manual.

(2) Refer Service members to the IDES in accordance with this manual, using VA Form 21-0819, "VA/DoD Joint Physical Disability Evaluation Board Claim," available at <http://www.va.gov/vaforms/>.

(3) Inform Service members upon referral to the IDES that they may seek assistance during the IDES process from:

(a) Government legal counsel (military or civilian employee) provided by the Military Departments in accordance with Enclosure 6 of Volume 1 of this manual;

(b) Private counsel retained at the Service member's own expense;

(c) A VA-accredited representative of a service organization that the Secretary of Veterans Affairs recognizes, using VA Form 21-22, "Appointment of Veterans Service Organizations as Claimant's Representative" (available at <http://www.va.gov/vaforms/>); or

(d) A VA-accredited claims agent or attorney using VA Form 21-22a, "Appointment of Individual as Claimant's Representative" (available at <http://www.va.gov/vaforms/>).

(4) Provide legal counsel to the Service member during the IDES in accordance with the standards for legal support in Enclosure 6 of Volume 1 of this manual. In accordance with Military Department regulations, government legal counsel of the applicable Military Department may, at no cost to a member, represent the Service member before DoD during all steps of the physical evaluation board (PEB) determinations. Government legal counsel of the Military Department concerned may represent a member before the VA during the pre-separation portion of the IDES process if the representation is pursuant to section 14.629 of Title 38, Code of Federal Regulations (Reference (f)).

(5) Ensure a single set of disability examinations are provided to Service members referred to the IDES in accordance with this volume. Secretaries of the Military Departments

will develop procedures for conducting disability examinations in coordination with the ASD(HA); Under Secretary for Benefits, VBA; and Under Secretary for Health, VHA.

(6) Recommend changes, in coordination with the USD(P&R), to VA disability examination procedures through the VA-DoD Joint Executive Committee structure.

(7) Identify Service members with such serious physical or mental impairments that they are unable to attend a disability examination. Those Service members should be brought to the attention of the responsible VA Military Service coordinator (MSC) so that VA may decide whether a compensation and pension assessment may be based on a review of medical records in lieu of a disability examination.

(8) Ensure DoD medical care providers complete VA's General Certification Course, as well as the specific training course for the requested exam before performing VA disability examinations.

(9) Track and ensure the completion of the cases of Service members in the IDES in accordance with established timeliness goals.

(10) Require that Service members in the IDES meet all IDES appointments, particularly during the medical evaluation board (MEB) phase of the IDES process during which critical case management briefings, disability examinations, and Military Department MEBs are completed. Commanders may grant exceptions to this requirement for the welfare or morale of a Service member as long as those exceptions do not prevent timely completion of IDES appointments.

(11) Clarify and amend disability examinations DoD providers perform that are insufficient to assign DoD and proposed VA disability ratings.

(12) Use the results of VA disability examinations to identify any medical conditions that, individually or collectively, prevent the Service member from performing the duties of the member's office, grade, rank, or rating.

(13) Include in all IDES case files an assessment of whether each unfitting disabling condition is permanent in nature based on accepted medical principles. Accept the disability rating(s) awarded to each of the compensable unfitting condition(s), as determined by the Military Department, rendered by the Disability Rating Activity Site (D-RAS) pursuant to part 4 of Reference (f) in determining separation and other administrative matters, including final disposition from the temporary disability retirement list (TDRL).

(14) Provide Service members the opportunity and assistance to request reconsideration of proposed VA disability ratings assigned for unfitting conditions before separation in accordance with the procedures in Appendix 4 and Appendix 11 to Enclosure 4 of this volume.

(15) Use the appropriate IDES separation program designator (SPD) codes in the permanent records of Service members separated from active military service through the IDES.

(16) Provide VA a letter indicating the date of separation with the appropriate SPD code within 5 days of the separation or retirement through the IDES of an RC member not on active duty who did not receive a DD Form 214, "Certificate of Release or Discharge from Active Duty." The DD Form 214 is available at <http://www.dtic.mil/whs/directives/infomgt/forms/dd/ddforms0001-0499.htm>.

(17) Correct the records, upon application by former Service members who successfully appeal disability ratings received in the IDES to VA and the respective Military Department Board for Correction of Military Records (BCMR). This includes the records of Service members who are veterans temporarily retired through the IDES who appeal ratings that affect unfitting conditions for which the retiree was placed on TDRL.

(18) Require IDES administrators to:

(a) Maintain timely, complete, and accurate data in the designated IDES electronic tracking system.

(b) Maintain the association between the designated IDES electronic tracking system unique case identifier and the Service member's personal identification number.

(c) Execute IDES procedures in accordance with standards for the protection of personally identifiable information and protected health information, in accordance with References (e) and (j).

(19) Meet the IDES processing timeliness goals in this volume without reducing Service members' rights to due process.

(20) Comply with sections 1210 and 1222 of Reference (c), including, when necessary, examining and rating veterans who were temporarily retired for disability.

b. Provide to VA, for rating purposes, the results of disability examinations that DoD examiners generate.

c. Establish an agreement jointly with the VBA and the VHA, so the departments can share IDES data electronically and obtain the most current military service data, medical evidence, and VA disability rating data.

ENCLOSURE 3

IDES PROCESS

1. GENERAL. The IDES is the process during which DoD determines whether wounded, ill, or injured Service members are fit for continued military service and, if unfit, appropriate benefits for Service members who are separated or retired for a Service-connected disability. The VA determines entitlement to veterans' benefits. The IDES features a single set of disability examinations that may assist DoD in identifying conditions that may render the Service member unfit. Although the IDES includes disability examinations, IDES processes are administrative in nature and are independent of clinical care and treatment. All IDES timelines in this manual refer to calendar days.

a. The IDES scope includes all disability examinations and all administrative activities associated with IDES case management from the point of referral by a military medical care provider to the point of return to duty or completion of VA's benefits decision letter, including the management of Service members who are temporarily retired for disability through the IDES.

b. Administrative requirements include, but are not limited to:

(1) Creating an IDES case file.

(2) Educating the Service member on the process, advising the Service member of the results of the MEB and PEB, as well as their options, rights, benefits, and entitlements.

(3) Assisting the Service member as the case progresses through the IDES process.

(4) Reevaluating Service members who were temporarily retired for disability through the IDES or who have an approved record correction requiring an examination.

2. PROCESS STEPS. This section describes the high-level IDES process. Appendix 3 to Enclosure 4 contains the detailed procedures for process participants. The IDES timeline is at Appendix 9 to Enclosure 4.

a. In consultation with the Service member's commander, a DoD medical care provider refers a Service member to the IDES and provides their referral to the military treatment facility (MTF) patient administrator or appropriate RC point of contact.

b. The MTF patient administrator or appropriate RC point of contact assigns a physical evaluation board liaison officer (PEBLO) to the Service member.

c. The PEBLO informs the Service member of the IDES process, assembles the IDES case file, enrolls the Service member in the designated IDES electronic tracking system, and refers the Service member to a VA MSC case manager.

d. The VA MSC informs the Service member of the VA portion of the IDES process, assists in the development of the disability claim, and requests that examiners perform the disability examinations required to adjudicate the Service member's disability claim.

e. Qualified examiners perform the disability examinations required to adjudicate the fitness for duty determination and rating determinations.

f. The VA MSC provides the completed disability examination results to the Service member's PEBLO and the VA D-RAS of jurisdiction and provides them to the Service member's PEBLO after the D-RAS has certified the results as sufficient for rating.

g. The PEBLO incorporates the disability examination results in the IDES case file and provides it to the MEB convening authority.

h. The MEB convening authority (MTF commander or senior physician(s) designated by the commander for this purpose) conducts an MEB and the PEBLO provides a copy of the MEB findings, including the completed VA disability examination results, to the Service member.

i. The Service member, when presented with the MEB findings, may request an impartial medical review (IMR) and/or rebut the MEB findings.

j. If applicable, the MEB convening authority provides the MEB's written response to the Service member's rebuttal of the MEB findings to the PEBLO.

k. The PEBLO provides a copy of the completed MEB findings to the Service member.

l. If the MEB did not return the Service member to duty, the PEBLO forwards the case to the PEB administrator.

m. The PEB administrator prepares and provides the Service member's case to an informal physical evaluation board (IPEB).

n. The IPEB adjudicates the case and requests the D-RAS provide proposed ratings.

o. The IPEB provides its findings to the Service member.

p. The D-RAS prepares and provides the Service member's proposed disability ratings and reconsideration of the proposed ratings (if the Service member requested reconsideration) to the IPEB.

q. If the Service member requests a formal physical evaluation board (FPEB), the FPEB meets, adjudicates the case, and provides its findings to the Service member.

r. If the Service member appeals the FPEB findings, the Military Department considers the appeal and returns to duty, separates, retires, or assists the Service member to complete an inter-Service transfer, if appropriate and approved.

s. The Military Department concerned provides Service members, separated or retired for disability through the IDES, with disability benefits and VA provides veterans with compensation at the earliest time allowed by law after separation.

t. The Military Department concerned periodically reexamines and re-adjudicates the cases of veterans who are temporarily retired for disability.

ENCLOSURE 4

IDES ENTITY PROCEDURES

Individuals perform specific procedures within the IDES. Each entity's procedures are detailed in the appendixes to this enclosure.

Appendixes

1. Service Member Procedures
2. DoD Medical Care Provider Procedures
3. Patient Administration Procedures
4. PEBLO Procedures
5. MEB Convening Authority Procedures
6. MSC Procedures
7. Commander Procedures
8. Qualified Examiner Procedures
9. PEB Administration Procedures
10. IPEB and FPEB Procedures
11. D-RAS Procedures
12. Military Department Procedures

APPENDIX 1 TO ENCLOSURE 4

SERVICE MEMBER PROCEDURES

1. The Service member (or a designated representative) may:
 - a. If desired, seek assistance from:
 - (1) Government legal counsel provided by the Military Departments in accordance with Enclosure 6 of Volume 1 of this manual.
 - (2) Private counsel retained at their own expense.
 - b. As applicable, complete and submit to the PEBLO:
 - (1) VA Form 21-22 to request assistance from a VA-accredited representative of a service organization recognized by the Secretary of Veterans Affairs.
 - (2) Section 2 of VA Form 21-0819 to claim disabling and service-connected conditions that were not referred by the Military Department concerned.
 - (3) DD Form 2807-1, "Report of Medical History," (www.dtic.mil/whs/directives/infomgt/forms/eforms/dd2807-1.pdf).
 - c. The Military Secretaries may not use the information provided on those forms relating to the origin, incurrence, or aggravation of a disease or injury in any manner against the interest of the Service member in accordance with section 1219 of Reference (c).
 - d. Upon receiving notice from the MSC, as required by Public Law 106-475 (Reference (g)):
 - (1) Waive the opportunity to submit information and evidence consistent with Reference (g).
 - (2) Submit any information or evidence to substantiate the claim.
 - e. Within 5 days of being informed about the VA disability process by the MSC, submit VA Form 21-0819 to the MSC with sections 2, 3 (if applicable), 4 (if applicable), and 5 completed.
 - f. Within 5 days of receiving the completed and signed MEB results, including completed VA disability evaluation results, submit to the PEBLO, if desired, request(s) for an IMR or MEB rebuttal or both. The Service member or representative may request an extension of time to prepare the IMR or MEB rebuttal, which must be granted by the MEB convening authority when good cause is shown.
2. The Service member (or a designated representative) may, if found unfit by the IPEB:

a. Accept or rebut the IPEB unfit determination, and request an FPEB by notifying the PEBLO, in writing, within 10 days of receiving the IPEB findings and proposed VA disability ratings. The request should include a clear statement of the reason for rebuttal and the remedy sought. The Service member's right to a full and fair hearing will not be denied based on the lack of a statement or a determination that any such statement is insufficient, unclear, or otherwise objectionable. The PEB may grant an extension beyond 10 days if good cause is shown.

b. Accept the IPEB unfit determination and request a one-time reconsideration by D-RAS of the proposed disability rating(s) for unfitting conditions only by notifying the PEBLO or PEB, in writing, within 10 days of receiving the proposed disability rating and a copy of the complete DES case file. The DES case file will include the IPEB findings, the MEB findings, the narrative summary, all disability examinations, the commander's statement, and service treatment records. When the Service member is granted an FPEB, the Service member will defer requesting the one-time VA proposed rating reconsideration until after receipt of the FPEB decision.

3. The Service member (or a designated representative) may, if found fit for continued service by the IPEB:

a. Accept the finding by notifying his or her PEBLO, in writing, within 10 days of receiving the IPEB findings.

b. Rebut the fit findings of the IPEB by notifying the PEBLO, in writing, within 10 days of receiving the IPEB findings and providing new information that the IPEB did not previously consider.

c. Rebut the fit finding of the IPEB and, if the Service member is then found unfit by an FPEB or Military Department disability disposition approval authority, may request a one-time reconsideration of his or her proposed disability rating(s) for unfitting conditions by notifying the PEBLO or PEB, in writing, within 10 days of receiving the proposed VA disability rating. The PEB may grant an extension beyond the 10 days if good cause is shown.

4. The Service member (or a designated representative) may appeal the FPEB findings regarding fitness for duty to all subsequent levels allowed by the Military Department concerned.

5. After the Service member (or a designated representative) submits VA Form 21-0819 to the MSC, the Service member may claim additional conditions, but VA will not evaluate the added claimed conditions until after separation from service unless the PEB refers the condition for further VA or MEB evaluation before issuing a fitness determination.

6. In the event the Service member desires to transfer to another branch of the Military Service, he or she may apply to the appropriate Service headquarters to determine if he or she meets the Service standards.

7. Upon separation from military service for medical disability and consistent with BCMR procedures of the Military Department concerned, the former Service member (or a designated representative) may request correction of his or her military records if new information arises regarding his or her service or condition that may result in a different disposition.

a. For example, a veteran who was separated or retired through the IDES and who locates a portion of their service treatment record that was missing during the IDES process may request that VA adjust the disability rating of an unfitting condition.

b. If VA changes the proposed disability rating for the unfitting condition based on the new information, and the change would have resulted in a different DoD disability disposition, then the Service member may request correction of the military records through his or her respective Military Department BCMR.

8. If after separation from service and attaining veteran status the former Service member (or a designated representative) desires to appeal a determination in the VA rating decision provided after separation, the veteran (or a designated representative) has 1 year from the date of the benefits decision letter that VA sends the veteran after separation from military service, to submit a written notice of disagreement with the decision to the VA regional office of jurisdiction.

9. The Service member has a limited time to file a VA Form 9, "Appeal to the Board of Veterans Appeals," available at <http://www.va.gov/vaforms/>. Depending on which time period is longer, the Service member has either 60 days from the date the VA regional office of jurisdiction provides the statement of the case or the remainder of the 1 year from the date the VA made its decision.

APPENDIX 2 TO ENCLOSURE 4

DoD MEDICAL CARE PROVIDER PROCEDURES

An authorized qualified DoD medical care provider, must:

- a. Initiate the IDES process.
- b. In coordination with the Service member's commander, refer the Service member to the IDES process in accordance with Enclosure 3 of this volume.
- c. Complete section 1 of VA Form 21-0819, provide it to the PEBLO, and initiate a request for a TRICARE authorization via the MTF's referral management process for the Service member to be examined by the VA.
- d. Notify the Service member of his or her referral to the IDES and direct the Service member to the MTF patient administrator or appropriate RC point of contact.
- e. Notify the MTF patient administrator or appropriate RC point of contact of a Service member's referral to the IDES.
- f. Prepare and gather, in coordination with the PEBLO, the minimum MEB elements identified in Enclosure 9 of this volume.
- g. For newly identified conditions, document on the examination report whether these newly identified conditions, individually or collectively, render the member unfit to perform the duties of the member's office, grade, rank, or rating, or are otherwise cause for referral to the PEB, as established by Reference (b) or Military Department regulations.

APPENDIX 3 TO ENCLOSURE 4

PATIENT ADMINISTRATION PROCEDURES

The Director, Patient Administration, must:

- a. Assign a PEBLO within 3 days of the date the DoD medical care provider refers the Service member to an MEB.
- b. Receive the VA disability examination results from the qualified disability examiner through the PEBLO and ensure the examination results are recorded in the Service member's service treatment record.
- c. Provide the Service member's service treatment record and disability examination results to the provider who will construct the narrative summary and MEB report.
- d. Ensure the PEBLO and MSC receive the narrative summary within 3 days of the date of signature of the DoD medical care provider.
- e. Assist Service members who request to consult with an impartial medical reviewer or legal counsel, or rebut MEB findings.

APPENDIX 4 TO ENCLOSURE 4

PEBLO PROCEDURES

1. GENERAL. The PEBLO is one of the most important contacts for the Service member in the IDES and should communicate with the Service member, their commander, and VA throughout the IDES process. Immediately after a DoD medical authority refers a Service member for disability evaluation in the IDES, the MTF patient administrator assigns a PEBLO to the Service member. The PEBLO:

- a. Notifies the Service member's commander once a Service member is referred into the IDES.
- b. Coordinates all necessary IDES appointments for the Service member in conjunction with the MSC.
- c. Maintains full cognizance of the case and communicates with the Service member from the point of MEB referral to the Service member's return to duty or separation from military service.

2. PEBLO PROCEDURES. The PEBLO must:

a. Within 3 days of the date the DoD medical care provider referred the case to an MEB or, for RC Service members, not later than the next drill after referral to an MEB by the DoD medical care provider:

- (1) Build the IDES case file.
- (2) Inform the Service member of the DoD IDES process and that they may seek assistance during the IDES process from:
 - (a) Government legal counsel provided by the Military Departments in accordance with Enclosure 6 of Volume 1 of this manual;
 - (b) Private counsel retained at the Service member's own expense;
 - (c) A VA-accredited representative of a service organization recognized by the Secretary of Veterans Affairs, using VA Form 21-22; or
 - (d) A VA-accredited claims agent or attorney, using VA Form 21-22a.
- (3) Provide Service members who are referred to the IDES with:

(a) A brochure or handout detailing the benefits, anticipated process timeline, right to legal counsel, and possible decisions at each step of the IDES.

(b) The link to the Compensation and Benefits Handbook for Seriously Ill and Injured Members of the Armed Forces (<https://www.nrd.gov>).

(c) A copy of VA Form 21-22, ensuring the word “veteran” in Block 1 is deleted and replaced with “Service member.”

(4) Inform the Service member that they are required to provide all service treatment records, including civilian records, to the PEBLO for inclusion in the DES case file during the claims development phase of the IDES.

b. Within 5 days of the date the DoD medical care provider referred the case to the IDES:

(1) Request a non-medical assessment from the Service member’s commander.

(2) Provide the MSC a memorandum stating the Service member’s treatment record is complete.

c. Within 10 days of the date the DoD medical care provider referred the case to the IDES for AC Service members, or within 30 days of the referral date for RC Service members:

(1) Provide the MSC a copy of the member’s IDES case file, VA Form 21-0819 (with Section 1 completed), and service treatment record, including entrance physical, mental health records, and records from the Armed Forces Health Longitudinal Technology Application, the Composite Health Care System, and other applicable sources of electronic health records.

(2) When a Service member’s complete service treatment record is not available, provide the MSC a memorandum describing the actions taken to locate the missing records and informing the MSC that the medical records are not available.

d. Within 3 days following receipt of the IDES case file and disability examination requirements from the MSC, inform the Service member and the Service member’s commander of all scheduled disability examinations.

e. Monitor the Service member’s completion of IDES appointments, including disability examinations.

(1) Approve and coordinate the Service member’s requests for rescheduling VA examination appointments by contacting the MSC. Within 3 days of receipt of rescheduled VA examination appointments, inform the Service member and Service member’s commander of new appointments.

(2) If an MSC or VA examination facility notifies the PEBLO that a Service member failed to report for any scheduled IDES appointment, which includes an initial interview or

examination appointment(s), inform the Service member's command. Reschedule VA examination appointments by contacting the MSC. Within 3 days of receipt of rescheduled VA examination appointments, inform the Service member and Service member's commander of new appointments, and if necessary, request the command to provide an escort.

f. Assemble the IDES case file to include all medical and non-medical information for the MEB to consider.

g. Inform the Service member that his or her case is being forwarded to the MEB.

h. Forward the Service member's case file to the MEB.

i. Within 3 days of receiving the MEB results or not later than the next Reserve drill, provide a copy of the MEB findings to the MSC and notify the Service member of the MEB results, including the medical conditions that individually or collectively prevent the Service member from performing the duties of his office, grade, rank, or rating. Advise the Service member of the date of PEB referral. Upon request and with the Service member's consent, PEBLOs will provide a designated representative or legal counsel with the Service member's completed DES case file.

j. While undergoing consideration by the MEB, inform the Service member of his or her right to request an IMR.

k. Forward the results of the IMR or MEB rebuttal, if applicable, to the MEB, as required.

l. If the MEB finds the Service member has medical conditions that individually or collectively prevent the Service member from performing the duties of his office, grade, rank, or rating, assemble the MEB case file with all attachments and forward the complete MEB case file to the PEB.

m. Inform the MSC of the date of referral to the IPEB.

n. Within 3 days of receiving the IPEB findings from the PEB administrator or at the next Reserve drill, provide a copy and inform the Service member of the IPEB findings, the VA proposed ratings and benefits estimate letter, and his or her options, including consultation with government legal counsel. If the PEB finds the member fit, notify the MSC of that finding and provide a copy of the PEB findings to the MSC. Advise the Service member of their right to legal counsel regarding the preparation of a rebuttal of his or her fitness decision or disability rating, if applicable.

o. Within 10 days after the Service member receives his or her IPEB findings or not later than the next Reserve drill:

(1) Assist the Service member with the administrative completion of preparing a rebuttal to his or her IPEB unfit for duty finding, if applicable. However, they are not Service member

legal advocates, and may not provide advice, legal counsel, or other assistance regarding substantive aspects of the rebuttal.

(2) If applicable, administratively assist the Service member in preparing a request to the D-RAS to reconsider the proposed VA disability ratings of unfitting conditions, unless the request for reconsideration is deferred to after completion of a formal hearing. Provide the Service member's request for reconsideration to the PEB and MSC within 10 days of the date the Service member received the IPEB findings. Additionally, inform the Service member of his or her right to consult with and be represented by government counsel from the Military Department, a private counsel retained at member's expense, as well as the opportunity to be represented before VA by a VA-accredited attorney, agent, or representative of a VA-recognized Service organization.

(3) If applicable, inform the Service member of VA's decision to propose a finding of incompetency, and record the date and name of the person who signed the letter to the Service member.

(4) Provide the Service member's request for an FPEB to PEB administration.

(5) Inform the MSC and Service member's commander of the Service member's acceptance of findings, request for reconsideration, or request for an FPEB.

p. Notify the Service member and his or her commander of the FPEB date.

q. Monitor case progress and resolve complications related to the FPEB.

r. Within 3 days after receiving the FPEB findings from PEB administration or not later than the next Reserve drill:

(1) Inform the Service member of the FPEB findings and right to appeal the findings to the Military Department review authority, or ensure a Military Department representative, such as a PEB official, informs the Service member.

(2) Advise the Service member of his or her right to government legal counsel for assistance in the preparation of an appeal, or ensure a Military Department representative, such as a PEB official, informs the Service member.

s. Within 3 days of receiving the approval authority's decision or by the next Reserve drill, inform the Service member of the Military Department's final fitness disposition, or ensure a Military Department representative, such as a PEB official, informs the Service member.

t. Enter IDES cases into the designated IDES electronic tracking system within 3 days of the date the medical care provider referred the case to the MEB. Enter or update the case data required in the designated IDES electronic tracking system within 3 days of the data becoming available.

u. Notify and provide documentation of the reason for disenrollment to the MSC and PEB when Service members are disenrolled from the IDES.

v. Inform the Service member (or a designated representative) to schedule and attend an exit interview with the MSC before exiting the IDES process.

w. Upon request and with the consent of the Service member, provide Service member or the Service member's legal counsel with a complete copy of the IDES case file.

APPENDIX 5 TO ENCLOSURE 4

MEB CONVENING AUTHORITY PROCEDURES

The MEB convening authority must:

- a. Assemble an MEB in accordance with Enclosure 3 of Reference (b) and Military Department regulations, using the information the PEBLO provides in the DES case file. MEB members will consult and decide whether the Service member has medical conditions that, individually or collectively, may render the member unfit to perform the duties of the member's office, grade, rank, or rating. Any MEB listing a psychiatric diagnosis must contain a thorough psychiatric evaluation and include the signature of at least one psychiatrist or psychologist with a doctorate degree in psychology.
- b. Ensure that, within 30 days of receipt of the complete DES case file, the MEB completes their deliberations and documents their decision, which must include the specific condition(s), individually or collectively, that may cause the Service member to be unfit to perform the duties of the member's office, grade, rank, or rating. The MEB returns the DES case file, with the completed finding, to the PEBLO.
- c. Ensure that MEB rebuttal procedures meet the guidelines outlined in References (b) and (d).

APPENDIX 6 TO ENCLOSURE 4

MSC PROCEDURES

1. GENERAL. The MSC is a critical contact for the Service member or veteran throughout the IDES process. Assigned immediately after the PEBLO is assigned to assist the Service member, the MSC provides the link between the Service member and VA by keeping the Service member, veteran, and the PEBLO informed of VA processes.

2. MSC PROCEDURES. The MSC must:

a. Within 10 days of receiving a Service member's IDES case file, including a complete copy of the service treatment record, either paper or electronic:

(1) Inform the Service member of his or her rights and VA actions in the IDES, including:

(a) The information and evidence necessary to substantiate a claim for VA disability compensation, noting that a claim can be filed with VA for any condition.

(b) The opportunity to be represented before VA by any attorney, agent, or representative of a recognized veterans' service organization providing representation to Service members who have complied with part 14 of Reference (f).

(2) Notify the Service member that they may submit additional information and evidence to support their claim, as required by Reference (g). The MSC may solicit a waiver from the Service member or veteran of the 30-day period they have to submit any information or evidence to substantiate the claim.

(3) Assist the member in completing VA Form 21-0819.

b. When the Service member completes section 2 of VA Form 21-0819, enter the information from the form into the VA claims processing system.

(1) If the Service member declines to claim additional disabilities during the initial education session, the MSC will document in writing that the Service member does not desire to file a claim for VA disability benefits or does not want to claim any additional disabilities.

(2) If the Service member refuses to complete VA Form 21-0819, the MSC will annotate on the form that the Service member declined to claim additional disabilities and document the information in the designated IDES electronic tracking system.

c. Within 10 days for AC and 30 days for RC of receiving the Service member's DES case file from the PEBLO:

(1) Request required disability examinations using the VA Compensation and Pension Record Interchange, the Veterans Examination Request Information System, or other appropriate systems, as required and agreed to by the ASD(HA) and VBA.

(2) Simultaneously gather additional information and evidence required to substantiate the claim, such as service medical records and other pertinent records from previous periods of service, VA treatment or examination records, private medical treatment records, and additional information from the Service member.

(a) Continue processing the case while gathering additional information and evidence required to substantiate the claim. If unable to locate all of the relevant records, contact the Service member to:

1. Notify him or her that relevant records are missing (identify the records).

2. Explain the efforts made by VA, and describe any further action VA will take with respect to the records.

(b) The MSC may request additional examinations in coordination with the PEBLO and MTF liaisons if the Military Department concerned refers the Service member with new potentially unfitting medical conditions discovered through the course of routine care and treatment, or as found by the examiner.

d. Inform the Service member of the progress of the case.

e. When all examinations have been completed:

(1) Forward the VA claim folder to the appropriate D-RAS of jurisdiction.

(2) After the VA D-RAS has certified the examinations as sufficient for rating, provide the PEBLO the completed disability examination results.

f. Upon notification of the Service member's final disposition, conduct an exit interview with the Service member before the member departs the installation. Gather any additional required information in order to expedite payment of VA benefits after separation. Explain the appeal process and the appeal rights available to the member when the VA decision is finalized.

APPENDIX 7 TO ENCLOSURE 4

COMMANDER PROCEDURES

Commanders must:

a. Provide the non-medical assessment of the Service member's ability to perform their current job and the duties expected of the member's current office, grade, rank, or rating within 5 calendar days of the PEBLO's request.

b. If required, provide the PEBLO a complete line of duty (LOD) determination within 5 days of the request date or by the next Reserve drill.

c. Require Service members to attend all IDES appointments and VA disability examination appointments, particularly during the MEB phase of the IDES process during which critical case management briefings, disability examinations, and the Military Department MEB are completed.

(1) Commanders may grant exceptions to this requirement for the welfare or morale of a Service member, as long as those exceptions do not prevent timely completion of IDES appointments.

(2) Commanders may discuss the contents of the non-medical assessment with the Service member before submission to the PEB.

d. Inform the PEBLO of any scheduling conflicts with IDES appointments.

e. Require that IDES-referred Service members are assigned military duties appropriate to their condition and have a recovery care plan established, as applicable.

f. Inform the PEBLO if the Military Department initiates actions that may lead to administrative discharge or any unfavorable actions that arise during the member's IDES process.

APPENDIX 8 TO ENCLOSURE 4

QUALIFIED EXAMINER PROCEDURES

The qualified examiner must:

a. Complete the general medical and specialty examinations for Service members being considered for separation through the IDES within 45 days of receiving an IDES disability examination request and service treatment record. The 45-day timeframe will include 40 days for the completion of the examination and 5 days for the completion of the administrative requirements.

b. Perform disability examinations.

(1) Disability examinations will be performed by medical care providers who meet VA medical examination certification requirements. Qualified examiners may come from a variety of sources (e.g., DoD, VA, TRICARE, or contractor).

(2) While not prohibited, it is highly discouraged for the treatment provider to perform the disability examination. This allows the treatment provider to concentrate on medical care and the examiner to objectively focus on quantifying impairment.

(3) The examiner will review the Service member's complete service treatment record in conjunction with the examination, and before issuing the final examination report(s). Disability examinations for seriously or very seriously injured Service members who are not able to leave their bed, or otherwise attend an examination, may consist of a review of the medical records developed as part of the Service member's treatment.

c. In all disability examinations, include a complete review of systems and a comprehensive evaluation of medical conditions referred to the IDES by a DoD medical provider. If the member is on active duty, the disability examination will also address conditions that may have existed prior to service or that otherwise are considered not in the LOD. Disability examinations will include an evaluation of medical conditions identified and claimed by the member as having been incurred in, or aggravated by, military service. To the extent feasible, disability examinations will be documented according to VA standards or templates. Disability examinations will serve as the separation physical if separation from military service occurs through the IDES.

d. Note in the exam report any conditions found on exam, and share exam report with the PEBLO. If a new condition is ultimately referred, the PEBLO will notify the MSC so that a new examination can be ordered.

e. Perform TDRL re-examinations when necessary as applicable.

APPENDIX 9 TO ENCLOSURE 4

PEB ADMINISTRATION PROCEDURES

1. GENERAL. PEB administration ensures the IDES case file received from the PEBLO is processed through the IPEB or FPEB. PEB administration also supports the IDES quality control review process.

a. After receiving the complete and correct MEB case file from the PEBLO, the PEB administrator prepares the case for the PEB.

b. The PEB administrator notifies the PEBLO of the IPEB fit findings within 3 days of receiving the fit findings from an IPEB.

c. For all unfit findings from the IPEB, the PEB administrator forwards to the D-RAS within 3 days via secure electronic measures or overnight mail:

(1) A copy of the request for rating.

(2) The documentation upon which that assessment was made.

(3) The pertinent findings of the PEB.

d. The PEB administrator notifies the PEBLO of the IPEB unfit findings and D-RAS proposed ratings within 3 days of receiving the IPEB adjudication.

e. The Air Force and Navy PEBs must forward all IDES case information to:

U.S. Department of Veterans Affairs
Providence VA Regional Office
ATTN: DES
380 Westminster Street
Providence, RI 02903
E-mail: des.vbapro@va.gov

f. The Army PEBs must forward all IDES case information to:

SeaTac Processing Center
17930 International Blvd.
Suite 100
SeaTac, WA 98188
E-mail: des.vbasea@va.gov

2. FPEB. Within 3 days of receiving the Service member's request, as applicable, for a formal PEB, PEB administration must:

a. Schedule an FPEB.

(1) Provide Service members, their designated representative, or legal counsel a minimum of 10 days of advance notice of the formal hearing before the FPEB. This 10-day requirement may be waived, in writing, by the Service member.

(2) At a minimum, an assigned government legal counsel will consult with the Service member before the scheduled formal hearing, in accordance with guidance in Enclosure 6 of Volume 1 of this manual.

(3) Allow Service members traveling to an FPEB sufficient time to arrive (more than 1 day) in advance of the scheduled hearings to confer with government legal counsel.

b. Notify the PEBLO of the FPEB date.

c. Provide a copy of the DES case file to the Service member's legal counsel.

3. FINDINGS. Within 3 days of receiving findings from an IPEB or FPEB that is not rebutted or appealed, PEB administration must:

a. Process the IPEB or FPEB findings.

b. Notify the Service Headquarters, PEBLO, and MSC of the findings.

APPENDIX 10 TO ENCLOSURE 4

IPEB AND FPEB PROCEDURES

1. GENERAL. The IPEB and FPEB determine a Service member's fitness in accordance with Appendix 2 to Enclosure 3 of Reference (b), but do not assign disability ratings to conditions. The IPEB and FPEB support the IDES quality control review process in accordance with Enclosure 3 of Reference (b).

2. IPEB PROCEDURES. The IPEB members must:

a. Within 15 days of receiving the complete and correct MEB case file from the PEB administrator, adjudicate the Service member's case and forward the findings and recommendations to the PEB administration staff.

b. Within 15 days of receiving proposed disability ratings from the D-RAS, apply the ratings using the diagnostic code(s) provided by the D-RAS to the Service member's unfitting conditions and publish the disposition recommendation. For example, if the PEB identifies a condition to the D-RAS as schizophreniform disorder, but the D-RAS rates the condition as psychotic disorder not otherwise specified (VASRD 9210), then the PEB will apply the rating as "schizophreniform disorder rated as psychotic disorder not otherwise specified (VASRD 9210)."

c. Evaluate the Service member's request for FPEB. If a Service member requests an FPEB when the decision of the IPEB is fit for all conditions, then the PEB President or FPEB (or as specified by Military Department regulations) may, but is not required to, grant the Service member's request. If the request is granted, the PEB administrator prepares the case for an FPEB.

3. FPEB PROCEDURES. The FPEB members must:

a. Consider Service member rebuttals of issues pertaining to the fitness of conditions for service and the ratings assigned to unfitting conditions.

b. Render a recommendation within 30 days from the date the Service member elects to rebut the IPEB decision. The decision will be formally prepared by the PEB for the Service member.

c. Coordinate recommendations to change the status of conditions between fit and unfit with the D-RAS to ensure VA's proposed rating accurately reflects the PEB's final recommendation of unfitting conditions.

APPENDIX 11 TO ENCLOSURE 4

D-RAS PROCEDURES

1. After receiving the disability examination report from the MSC, the D-RAS determines and notifies the MSC whether the disability evaluation report is sufficient for disability rating purposes.
2. If, after receiving the request to rate unfit Service members, from PEB administration, the D-RAS evaluates the case file for sufficiency. If necessary, the D-RAS:
 - a. Will return the entire case file to the appropriate examining facility for correction or completion, within 3 days of receiving the case file, via next-day mail or secure electronic measures, if the disability examination report is inadequate.
 - b. Notifies the referring Service PEB administrator, PEBLO, and MSC when a case file is being returned for additional required information.
3. The D-RAS will rate the Service member's referred and claimed Service-connected disabilities and provide a proposed rating decision, with rationale, to the PEB within 15 days of notification by the PEB administration staff that a Service member is unfit.
 - a. Once the D-RAS has rated all unfitting conditions, the D-RAS will provide their proposed rating decision to the PEB.
 - b. The D-RAS will defer rating all other conditions identified after the Service member signs the VA Form 021-0819 until after separation from service.
4. Within 15 days of receipt from the PEB of a Service member's written request for a one-time reconsideration of a proposed disability evaluation assigned for unfitting conditions by VA, the VA decision review officer will consider any new documentation or information from the Service member and provide the PEB updated proposed ratings, if any.
 - a. The VA decision review officer will only reconsider ratings if new medical evidence is received, or the Service member is able to provide sufficient justification, such as error, to warrant the reconsideration.
 - b. The D-RAS will determine if the request for D-RAS reconsideration is based on appropriate grounds.
 - c. A request for reconsideration of the rating(s) from the D-RAS may only be submitted once for each unfitting condition. If additional conditions are found to be unfitting at the FPEB or Military Department Physical Disability Agency or Activity levels, Service members have a right to request a rating reconsideration on those new unfitting conditions before separation or retirement from military service. Subsequent appeals of ratings to VA must occur when the

Service member has separated, attained veteran status, and has been formally notified of the rating decision.

5. The D-RAS will enter or update the case data required in the designated IDES electronic tracking system within 3 days of the data becoming available.

APPENDIX 12 TO ENCLOSURE 4

MILITARY DEPARTMENT PROCEDURES

The Military Department concerned will:

- a. Place RC Service members on orders, as needed, according to Military Department Secretary guidelines.
- b. Process IDES decisions in accordance with this volume and their respective regulations.
- c. Return to duty, separate, retire, or assist the Service member to complete an inter-Service transfer, as appropriate.
- d. Within 5 days of receiving the approval authority's decision to separate the Service member, establish a separation date in accordance with their respective regulations; the separation date should generally be within 45 days from the date of approval of the disposition for AC Service members. The 45-day goal may be extended to allow the Service member to take authorized administrative absences and use accrued leave.
- e. Notify the MSC of the member's separation date and provide a copy of the Service member's DD Form 214 or separation letter to the MSC.
- f. Advise AC Service members that it may be in their financial best interest to separate before, but as close as possible to, the last day of the month to minimize the time before payment of VA disability compensation.
- g. Advise RC Service members that the earliest possible date of entitlement to VA compensation may begin when the Service member's period of active service ends and the Service member becomes a veteran.
- h. Notify the responsible VA regional office after correcting the record of a veteran who was separated or retired through the IDES.
- i. Review Disability Advisory Council (DAC) reports and other reports and data from the IDES and, in coordination with DASD(WCP) and VA, adjust their IDES process to ensure a fair and equitable process for all Service members in the IDES.
- j. Using course content supplied by VA, provide training for DoD medical care providers who conduct disability examinations.
- k. Using VA certification processes, document the qualifications of DoD personnel who conduct IDES disability examinations.

1. Train PEBLOs on the IDES process, including Service member options, rights, benefits, entitlements, and the timeliness goals and performance associated with the IDES process.

ENCLOSURE 5

TDRL PROCEDURES

1. PEB INITIAL ADJUDICATION. IPEBs must forward the cases of unfit Service members to the D-RAS and must include a medical assessment prepared by a DoD clinician as to whether each unfitting condition will most likely improve, remain stable, or worsen based on accepted medical principles and the clinician's findings.

2. D-RAS ADJUDICATION. The D-RAS will rate all service-connected disabilities, claimed as well as unfitting, referred by the Service PEB. The D-RAS will determine if a future examination is required for any of the service-connected disabilities based on part 3 of Reference (f), a review of the existing medical evidence of record, and existing VA policies and procedures in effect at the time of the rating determination and indicate this on the proposed rating.

3. IPEB DISPOSITION. The Military Department PEBs will use the future examination requirements set by the D-RAS as an indicator of stability when making the PEB's recommendations of stability determinations and case disposition to the Secretary of the Military Department. If the Service PEB decides to temporarily retire a Service member for disability for whom the D-RAS has not scheduled a future examination within 18 months of being placed on the TDRL, the Military Department will execute required TDRL examinations and ratings in accordance with Reference (f).

4. TDRL REEVALUATION. VA will conduct and prepare rating decisions for veterans who were temporarily retired for disability in accordance with VA laws and regulations. On request from the Military Department, VA will provide a copy of the most current rating and the medical evidence upon which the most current rating is based in accordance with section 7332 of Title 38, United States Code (Reference (h)). If VA does not provide examination and rating information sufficient to adjudicate the veteran's case or the VA exam is older than 18 months, the Military Department will execute required TDRL examinations and ratings in accordance with Reference (f).

5. LEGAL REPRESENTATION. Uniformed or civilian attorneys of the Military Departments, private counsel retained by the member at the member's expense, and attorneys or agents of recognized veterans service organizations, who satisfy the requirements of part 4 of Reference (f) are authorized to assist TDRL members with requests for reconsideration of VA rating determinations on medical disabilities determined to be unfitting and that affect Military Department decisions on their military benefits.

ENCLOSURE 6

IDES CASE TRACKING PROCEDURES

1. Upon referral of a Service member to the IDES, the PEBLO assigned to the Service member's case will initiate the case in the designated IDES electronic case tracking system.
2. If at any point the Service member is disenrolled from the IDES, the PEBLO or PEB must notify the MSC and the D-RAS of case disenrollment using secure electronic measures or commercial delivery service.

- a. The Air Force and Navy PEBs must forward all IDES case information to:

U.S. Department of Veterans Affairs
Providence VA Regional Office
ATTN: DES
380 Westminster Street
Providence, RI 02903
E-mail: des.vbapro@va.gov

- b. The Army PEBs must forward IDES case information to:

U.S. Department of Veterans Affairs
SeaTac Processing Center
17930 International Blvd
Suite 100
SeaTac, WA 98188
E-mail: des.vbadea@va.gov

ENCLOSURE 7

IDES TIMELINESS GOALS

1. GENERAL. Unless otherwise noted, all actions that specify timeliness requirements are measured in calendar days. Case processing timeliness goals for major portions of the IDES are described in this enclosure. The goals are stated as numeric averages across IDES cases.

2. AC

a. Overall IDES Process. The goal is for DoD and VA to complete 80 percent of cases of AC Service members in no more than 295 days from the date of referral to the IDES to the date of return to duty or notification of the VA benefits decision.

b. MEB Phase. The MEB phase of the IDES includes activities from the point of referral to the DES to the transfer of a completed MEB case file to the Military Department's PEB administration function. The IDES goal is to complete the MEB portion of the cases of AC Service members in no more than 100 days from the date of referral to an MEB by a DoD medical care provider to the date of receipt of the complete MEB case file by the PEB administrator. The IDES stage goals within the MEB phase are:

(1) Referral Stage. Complete the referral stage of the cases of AC Service members in no more than 10 days. The referral stage is measured from the date of referral to the IDES by a DoD medical care provider to the date the PEBLO provides the Service member's complete service treatment record, including the Service member's entrance physical and VA Form 21-0819, to the VA MSC.

(2) Claim Development Stage. Complete the claim development stage of the cases of AC Service members in no more than 10 days from the date the PEBLO provides the Service member's complete service treatment record and VA Form 21-0819 to the VA MSC to the date the MSC requests the Service member's medical evaluation.

(3) VA Disability Examination Stage. Complete the disability examination stage of the cases of AC Service members in no more than 45 days. The disability examination stage begins the date the MSC requests the Service member's disability examinations appointments and ends the date the MSC provides the proposed completed disability evaluation results to the PEBLO after the D-RAS has certified the results as sufficient for rating. The 45-day timeframe will include 40 days for the completion of the examination and 5 days for the completion of the administrative requirements.

(4) MEB Stage. Complete the MEB stage of the cases for AC Service members in no more than 35 days from the date the PEBLO receives the completed disability examination results from the MSC to the date the Military Department's MEB returns the Service member to

duty without referring them to an IPEB, or forwards the DES case file to PEB administration to begin processing for an IPEB.

(5) MEB Rebuttal Stage. Complete the MEB rebuttal stage consistent with the requirements in Reference (c) no more than 20 days from the date the PEBLO receives the Service member's request.

c. PEB Phase. Complete the PEB phase of the IDES process for AC Service member cases, including the VA disability rating stage, in no more than 120 days from the date of receipt of the complete MEB case file by the PEB administrator to the date the Military Department approves the final results of the disposition decision. The PEB phase includes 15 days for administrative processing tasks, such as copying and mailing case files. The IDES goals of the PEB phase are:

(1) IPEB Stage. Complete the IPEB stage for AC Service members in no more than 65 days from the date the PEB receives the DES case file from the PEBLO to the date either the Service member requests an FPEB or (if Service member concurs with IPEB findings) when the Military Department approves the final results of the disposition decision. This timeframe includes the time allotted for the D-RAS to complete rating decisions and reconsider rating decisions to the PEB, which is part of the disposition.

(2) FPEB Stage. Complete the FPEB stage for AC Service members in no more than 55 days from the date the PEB receives the DES case file from the PEBLO to the date either the Service member requests an FPEB appeal or (if Service member concurs with FPEB findings) when the Military Department approves the final results of the disposition decision. For cases found fit by an IPEB, but unfit by an FPEB, this timeframe includes the time allotted for the D-RAS to provide rating decisions and, as applicable, reconsidered rating decisions to the PEB, which is part of the disposition. For cases found unfit by an IPEB, this timeframe includes the time allotted for the D-RAS re-consideration and Military Department appeal processes.

(3) Proposed Ratings Stage. Complete the proposed ratings stage of the cases for AC Service members in no more than 15 days from the date the D-RAS receives the request for rating and service treatment record from PEB administration to the date the D-RAS sends the proposed rating to PEB administration.

(4) Rating Reconsideration Stage. Complete the rating reconsideration stage of the cases for AC Service members in no more than 15 days from the date the D-RAS receives the rating reconsideration request from PEB administration to the date the D-RAS sends the proposed ratings determination to PEB administration.

(5) Military Department Appeal Process and Secretarial Review Stage. Complete the Military Department appeal process and Secretarial review stage of the cases for AC Service members in no more than 30 days, including Secretarial review, from the date the Service member appeals the FPEB disposition to the date the Military Department approves the final results of the disposition decision.

d. Service Member Transition Phase. The Service member transition phase of the IDES includes processing the Service member for a return to duty or for separation. The IDES goal is to complete the Service Member transition phase of the IDES process for AC Service members in 45 days (plus any amount of administrative absences the Service member is authorized to take) from the date of approval of the final disability disposition decision to the date of the Service member's separation from military service.

e. VA Disability Compensation Delivery Phase. The IDES goal is to complete the VA disability compensation delivery phase of the IDES process of AC Service members' cases in no more than 30 days from the date of the Service member's separation from military service to the date VA issues the Service member's disability benefits decision letter.

3. RC

a. Overall IDES Process. Because of unique medical documentation and orders requirements, the IDES goal is for DoD and VA to complete 80 percent of cases for RC Service members in no more than 305 days from the time of referral to the DES to the point of return to duty or notification of VA benefits decision.

b. MEB Phase. Complete the MEB portion of the cases of RC Service members in no more than 140 days from the date of referral to the IDES by a DoD medical care provider to the date of receipt of the complete MEB case file by the PEB administrator. The IDES goals of the MEB phase are:

(1) Referral Stage. Complete the referral stage of the cases for RC Service members in no more than 30 days from the date of referral to the IDES by a DoD medical care provider to the date the PEBLO provides the Service member's complete service treatment record, including the Service member's entrance physical and VA Form 21-0819 to the VA MSC.

(2) Claim Development Stage. Complete the claim development stage of the cases for RC Service members in no more than 30 days from the date the PEBLO provides the Service member's complete service treatment record, including the Service member's entrance physical, and VA Form 21-0819 to the VA MSC to the date the MSC requests the Service member's medical evaluation.

(3) VA Disability Examination Stage. Complete the disability examination stage of the cases for RC Service members in no more than 45 days from the date the MSC requests the Service member's disability examination appointment.

(4) MEB Stage. Complete the MEB stage of the cases for RC Service members within 35 days from the date the MSC provides the disability examination results to the PEBLO to the date the Military Department's MEB returns the Service member to duty without referring them to an IPEB or forwards their DES case file to PEB administration to begin processing for an IPEB.

(5) MEB Rebuttal Stage. Complete the MEB rebuttal stage consistent with the requirements in Reference (c) no more than 20 days from the date the PEBLO receives the Service member's request.

c. PEB Phase. Complete the PEB phase of the IDES process for RC Service members, including the VA disability rating stage, in no more than 120 days from the date of receipt of the complete MEB case file by PEB administration to the date the Military Department approves the final results of the disposition decision. The PEB phase includes 15 days for administrative processing tasks, such as copying and mailing case files. The IDES goals of the PEB phase are:

(1) IPEB Stage. Complete the IPEB stage for RC Service members in no more than 65 days from the date the PEB receives the DES case file from the PEBLO to the date either the Service member requests an FPEB or (if Service member concurs with IPEB findings) when the Military Department approves the final results of the disposition decision. This timeframe includes the time allotted for the D-RAS to complete rating decisions and reconsidered rating decisions to the PEB, which is part of the disposition.

(2) FPEB Stage. Complete the FPEB stage for RC Service members in no more than 55 days from the date the PEB receives the DES case file from the PEBLO to the date either the Service member requests an FPEB appeal or (if Service member concurs with FPEB findings) when the Military Department approves the final results of the disposition decision. For cases found fit by an IPEB but unfit by an FPEB, this timeframe includes the time allotted for the D-RAS to complete rating decisions and reconsidered rating decisions to the PEB, which is part of the disposition. For cases found unfit by an IPEB, this timeframe includes the time allotted for the D-RAS re-consideration and Military Department appeal processes.

(3) Proposed Rating Stage. Complete the proposed rating stage of the case for RC Service members in no more than 15 days from the date the D-RAS receives the request for rating and service treatment record from PEB administration to the date the D-RAS sends the proposed rating determination to the PEB administrator.

(4) Rating Reconsideration Stage. Complete the rating reconsideration stage of the cases of RC Service members in no more than 15 days from the date the VA D-RAS receives the rating reconsideration request from PEB administration to the date the D-RAS sends the reconsidered proposed rating determination to the PEB administrator.

(5) Military Department Appeal Process and Secretarial Review Stage. Complete the Military Department appeal process stage of the cases of RC Service members in no more than 30 days, including Secretarial review from the date the Service member appeals the FPEB disposition to the date the Military Department Secretary's approval authority approves the final results of the disposition decision.

d. Service Member Transition Phase. The Service member transition phase of the IDES includes processing the Service member for a return to duty or to VA care. The IDES goal is to complete the Service member transition phase of the IDES process of the cases of RC Service members in 45 days from the date the Military Department informs the Service member of the

approved, final disability disposition decision to the date of the Service member's separation from military service through a retirement or separation order or letter.

e. VA Disability Compensation Delivery. There is no phase of the IDES process for these RC Service members who are not receiving active duty pay. For RC Service members, eligibility for disability compensation begins immediately upon separation. For RC Service members not on active duty orders, who meet the definition of a veteran in accordance with part 3 of Reference (f), the proposed rating will also serve as the actual rating, and VA will notify the veteran of the VA decision at that time.

4. TDRL TIMELINESS GOALS

a. Overall TDRL Process. The overall processing time for TDRL cases from the point of placement on the TDRL to the point of final disposition depends on the pace at which the unfitting conditions for which the veteran was placed on the TDRL become stable for rating purposes. There is no overall IDES TDRL processing timeliness goal; however, all temporary retired Service members must be removed within 5 years of initial placement on the TDRL. Timeliness goals for cases remain the same for all portions of the IDES process up to the point at which the member is notified of placement on the TDRL and VA notifies the Service member of the initial VA benefits decision at the completion of the VA benefits stage. The following timeliness goals are established for the remainder of the TDRL process. The IDES goals are:

(1) Initiation. Initiate the TDRL re-evaluation process within 16 months after placing a veteran on the TDRL or after the veteran's previous re-evaluation. Within that time, the Military Department will obtain all available medical treatment and rating documentation from DoD and VA.

(2) Examination. Complete the re-evaluations for unstable unfitting conditions not later than 18 months after placing a Service member on the TDRL or after the veteran's previous re-evaluation, provided such examination was conducted within the 18-month timeframe required by Reference (c).

(3) Ratings. Complete the proposed rating decision not later than 15 days after the D-RAS receives a completed examination report. The D-RAS will prepare rating decisions on future examinations conducted for IDES cases in accordance with part 3 of Reference (f).

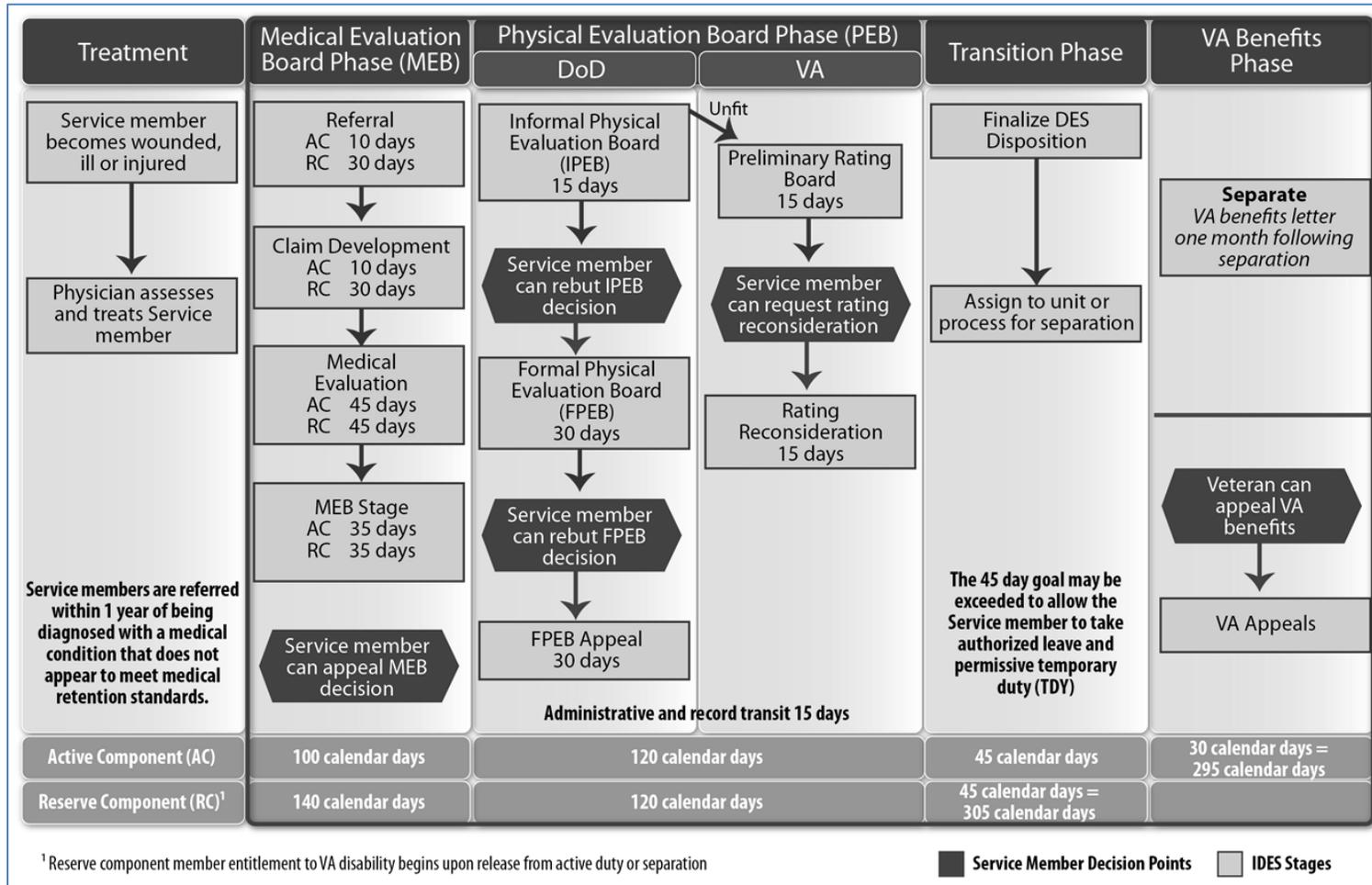
(4) PEB. Complete each PEB re-adjudication phase of TDRL cases, including IPEB and FPEB adjudications, administrative processing, and Military Department appeals, no more than 90 days from the date the PEB receives the medical and rating documentation, required by Appendix 4 to Enclosure 3 of Reference (b), for the unfitting conditions for which the veteran was placed on the TDRL to the date the Military Department informs the veteran of his or her TDRL disposition.

b. TDRL Termination. No veteran may remain on the TDRL for more than 5 years. The disposition of veterans placed on the TDRL rests solely with the Military Department.

ENCLOSURE 8

IDES TIMELINE

Figure. IDES Timeline



ENCLOSURE 9

DOCUMENTATION OF MEB RESULTS

MINIMUM MEB ELEMENTS. MEB results will include the elements listed in paragraphs 1a through 1i of this enclosure, at a minimum. The Military Services may require additional elements (e.g., performance assessments).

a. Cover sheet with MEB convening authority signature and MEB decision (added after the MEB).

b. Narrative summary describing history, present status, and prognosis. For medical conditions that, individually or collectively, may render the member unfit to perform the duties of the member's office, grade, rank, or rating, the MEB results will describe:

(1) The medical history and current clinical condition. Document whether additional medical exams or diagnostic tests were performed due to the results substantially affecting identification of the existence or severity of potentially unfitting conditions.

(2) The impact on required duty and associated operational assignment limitations.

(3) Whether the medical conditions are likely to improve sufficiently for the member to perform the full duties of the member's office, grade, rank, or rating within 12 months.

(4) How the severity of the member's medical conditions are likely to change within the next 5 years.

(5) The requirement to monitor or provide treatment for the member's chronic conditions beyond the next 12 months.

c. Examinations that meet minimum disability examination criteria for all medical conditions that could, individually or collectively, prevent the Service member from performing the duties of his office, grade, rank, or rating.

d. Complete medical record (including medical profile, and appropriate ancillary test and evaluation results).

e. Commander's non-medical assessment letter.

f. MEB addendums.

g. LOD determinations when required by Military Department regulations.

h. Service member rebuttal and surrebuttal if the member submits a rebuttal.

i. Competency statement if psychiatric consideration exists.

GLOSSARY

PART I. ABBREVIATIONS AND ACRONYMS

| | |
|-----------|---|
| AC | Active Components |
| ASD(HA) | Assistant Secretary of Defense for Health Affairs |
| ASD(M&RA) | Assistant Secretary of Defense for Manpower and Reserve Affairs |
| BCMR | Board for Correction of Military Records |
| DAC | Disability Advisory Council |
| DASD(WCP) | Deputy Assistant Secretary of Defense for Warrior Care Policy |
| DES | Disability Evaluation System |
| DoDI | DoD instruction |
| D-RAS | Disability Rating Activity Site |
| FPEB | formal physical evaluation board |
| IDES | Integrated Disability Evaluation System |
| IMR | impartial medical review |
| IPEB | informal physical evaluation board |
| LOD | line of duty |
| MEB | medical evaluation board |
| MSC | Military Service coordinator |
| MTF | military treatment facility |
| PEB | physical evaluation board |
| PEBLO | physical evaluation board liaison officer |
| RC | Reserve Component |
| SPD | separation program designator |
| TDRL | temporary disability retired list |
| USD(P&R) | Under Secretary of Defense for Personnel and Readiness |
| VA | Department of Veterans Affairs |
| VASRD | Department of Veterans Affairs Schedule for Rating Disabilities |
| VBA | Veterans Benefits Administration |
| VHA | Veterans Health Administration |

PART II. DEFINITIONS

Unless otherwise noted, these terms and definitions are for the purposes of this volume.

accepted medical principles. Fundamental deductions, consistent with medical facts, that are so reasonable and logical as to create a reasonable assumption that they are correct.

active duty. Defined in the DoD Dictionary of Military and Associated Terms (Reference (i)).

active service. Service on active duty or full-time National Guard duty.

compensable unfitting condition. A service-connected medical condition incurred or aggravated in the line of duty that prevents the Service member from reasonably performing the duties of his office, grade, rank, or rating due to physical disability; and meets the statutory criteria pursuant to Reference (c) for entitlement to disability retired or severance pay.

DAC. A DoD-only group that evaluates DES functions, identifies best practices, addresses inconsistencies in policy, discusses inconsistencies in law, addresses problems and issues in the administration of the DES, and provides a forum to develop and plan improvements.

designated representative. A person making DES decisions for the Service member. This could be a court-appointed member or a personal representative in accordance with DoD Manual 6025.18 (Reference (j)).

disability. Any impairment due to disease or injury, regardless of degree, that reduces or prevents an individual's actual or presumed ability to engage in gainful employment or normal activity. The term "disability" or "physical disability" includes mental disease, but not such inherent defects as developmental or behavioral disorders. A medical impairment, mental disease, or physical defect standing alone does not constitute a disability. To constitute a disability, the medical impairment, mental disease, or physical defect must be severe enough to interfere with the Service member's ability to adequately perform his or her duties.

fitness determination. A determination by the PEB of a Service member's ability to reasonably perform the duties of his office, grade, rank, or rating.

government legal counsel. A U.S. Government attorney, representing the interests of the Service member, who may be an assistant Staff Judge Advocate, General Schedule civilian employee, or contracted attorney paid for by the U.S. Government.

IDES. The joint DoD-VA process by which DoD determines whether ill or injured Service members are fit for continued military service and DoD and VA determine appropriate benefits for Service members who are separated or retired for disability.

Joint Executive Committee. A group that provides senior leadership for collaboration and resource sharing between VA and DoD.

LOD determination. An inquiry used to determine whether a Service member incurred an injury or disease while in a duty status; whether it was aggravated by military duty; and whether incurrence or aggravation was due to the Service member's intentional misconduct or willful negligence.

MEB. For Service members entering the DES, the MEB conducts the medical evaluation on conditions that potentially affect the Service member's fitness for duty. The MEB documents the Service member's condition and medical history with a narrative summary, sometimes referred to as the MEB report. The MEB is composed of two or more civilian or military physicians working for the Military Department concerned.

MEB convening authority. A senior medical officer, appointed by the MTF commander, who has detailed knowledge of standards of medical fitness and disposition of patients and disability separation processing and who is familiar with the VASRD.

MSC. A VA employee assigned to serve as a liaison for the Service member throughout the VA disability evaluation and claims process.

office, grade, rank, or rating

office. A position of duty, trust, and authority to which an individual is appointed.

grade. A step or degree in a graduated scale of office or military rank that is established and designated as a grade by law or regulation.

rank. The order of precedence among members of the Military Services.

rating. The name (such as "Boatswain's Mate") prescribed for Service members of a Military Service in an occupational field.

PEBLO. The non-medical case manager who provides information, assistance, and case status updates to the affected Service member throughout the DES process.

retention standards. Guidelines that establish medical conditions or physical defects that could render a Service member unfit for further Military Service and may be cause for referral of the Service member into the DES.

service treatment record. A chronological record documenting the medical care, dental care, and treatment received primarily outside of a hospital (outpatient), but may contain a synopsis of any inpatient hospital care and behavioral health treatment.

SPD. A designator code that lists the conditions under which a Service member is discharged from military service.

unfitting condition. A disability that prevents a Service member from performing the duties of his or her office, grade, rank, or rating. These duties include those performed during a remaining

period of Reserve obligation. If the Service member were to continue on active duty or in an active Reserve status, the disability would represent a decided medical risk to the health of the Service member or to the welfare or safety of other Service members, or would impose unreasonable requirements on the military to maintain or protect the Service member.

veteran. A person who served in the active military and who was discharged or released under conditions other than dishonorable.