

Optum Serve®

VBA Medical Disability Exams

(Presentation to VFW on
Benefits Delivery at Discharge)

November 14, 2023



Disclaimer

This presentation is the property of Optum Serve and does not represent the official position or policy of the Veterans Benefits Administration (VBA) Medical Disability Examination office (MDEO) or the United States Government. The information contained in these slides represents the processes and perspectives of the Optum Serve Medical Disability Examination program.

Agenda

1. Optum MDE Program Overview
2. Pre-Discharge Contract – Key Provisions
3. BDD Exam Request Volume / Distribution
4. Optum Serve Exam Process
5. Contact and Exam Scheduling Process
6. The Separation Health Assessment and Claims File
7. Releasing Information to Third Parties
8. How You Can Help / Things to Remember

Veterans Benefits Administration Medical Disability Examinations (VBA MDE)



When Veterans or Service Members file claims with the Veterans Benefits Administration and an exam is required, our program completes the requested exam services and submits the results to Veterans Benefits Management System.

The expansive network of Optum Serve Providers, growing portfolio of dedicated clinics and expanding fleet of mobile examination units support Veterans like Maria obtain the benefits she's earned at the end of her military service. Optum Serve is proud to support Veterans and Service Members through the Medical Disability Examinations program,



Nationwide network of providers



150+ Dedicated Clinics



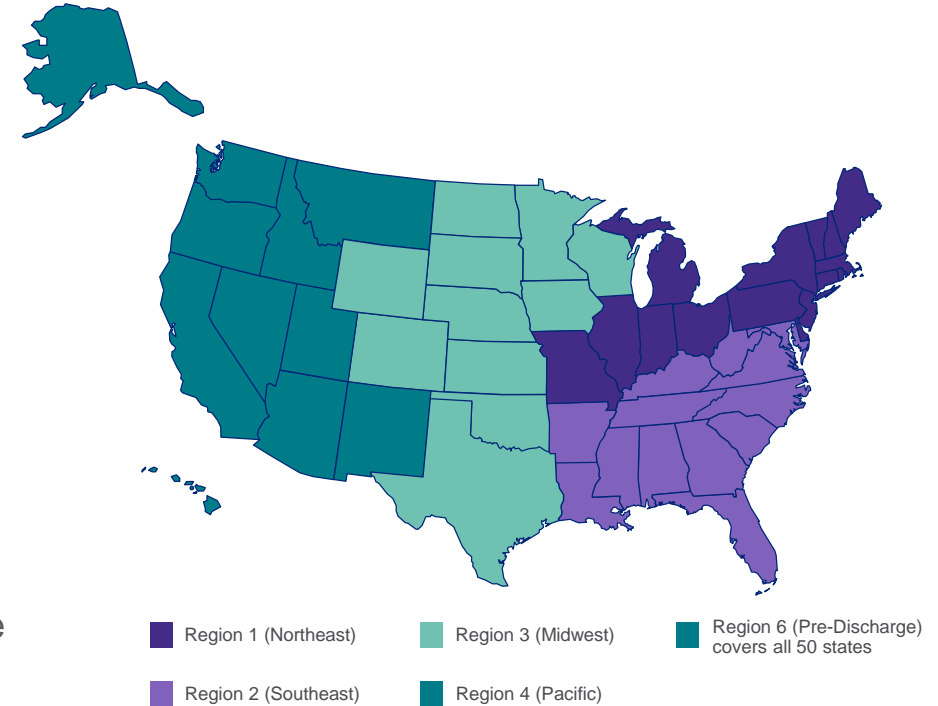
15 Mobile Examination Units



Performing Services In All 50 States



Electronic portals for Veterans, Service Members and Examiners



The Region 1-4 contracts are for Veteran examinations and the Region 6 contract is the Pre-Discharge contract, which includes Benefits Delivery at Discharge (BDD) and Integrated Disability Examination System (IDES) exams. Optum Serve has performed Pre-Discharge examinations **since July 2022** and has completed Veteran exams for more than 12 years. Optum Serve does not perform international exams.

Veterans Benefits Administration Medical Disability Examinations (VBA MDE)



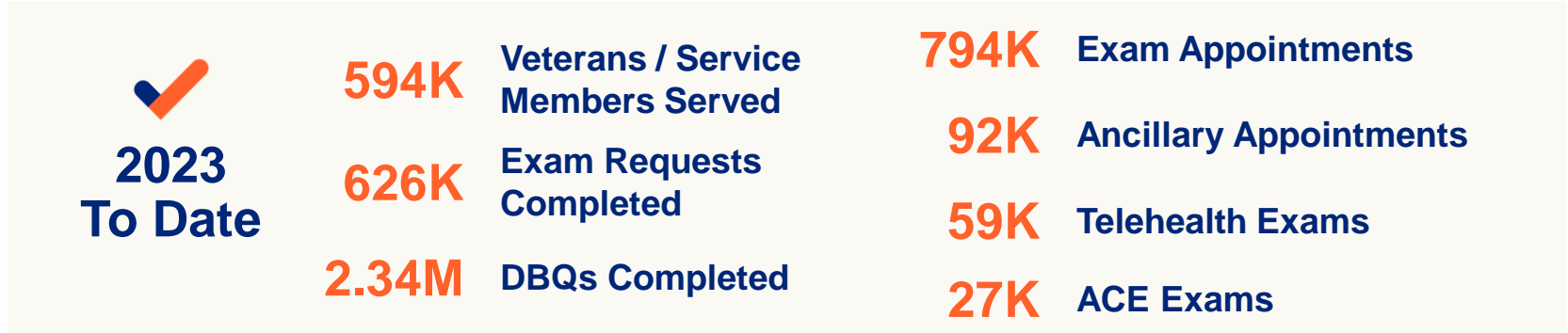
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Medical Director

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Director of Program Performance

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Clinical Operations / Review



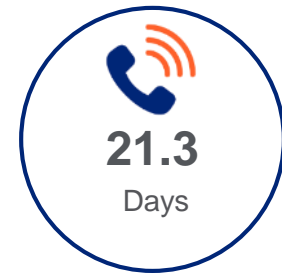
Contractual Performance Measures



Quality scores consistently exceed contract standards on all five of our MDE contracts. Optum is the quality leader for the MDE program. September 23 quality score for PreD contract was 98%



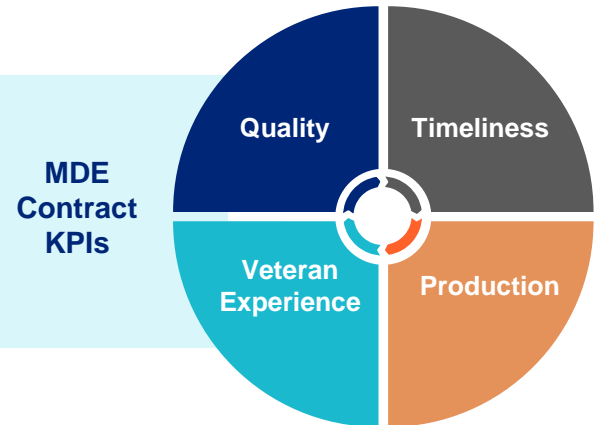
Average weekly ESR completions (18K) and appointments scheduled (28K) continue to rise as the volume of exam requests from the VBA has gone up with the PACT Act. 700-800 Pre-D ESR completions with ~2.5K appointments each week










Average time to schedule and conduct the initial appointment for the most recent quarter. Timeliness continues to be a focus for the MDE program as the volume of claims, ESRs, and appointments increases



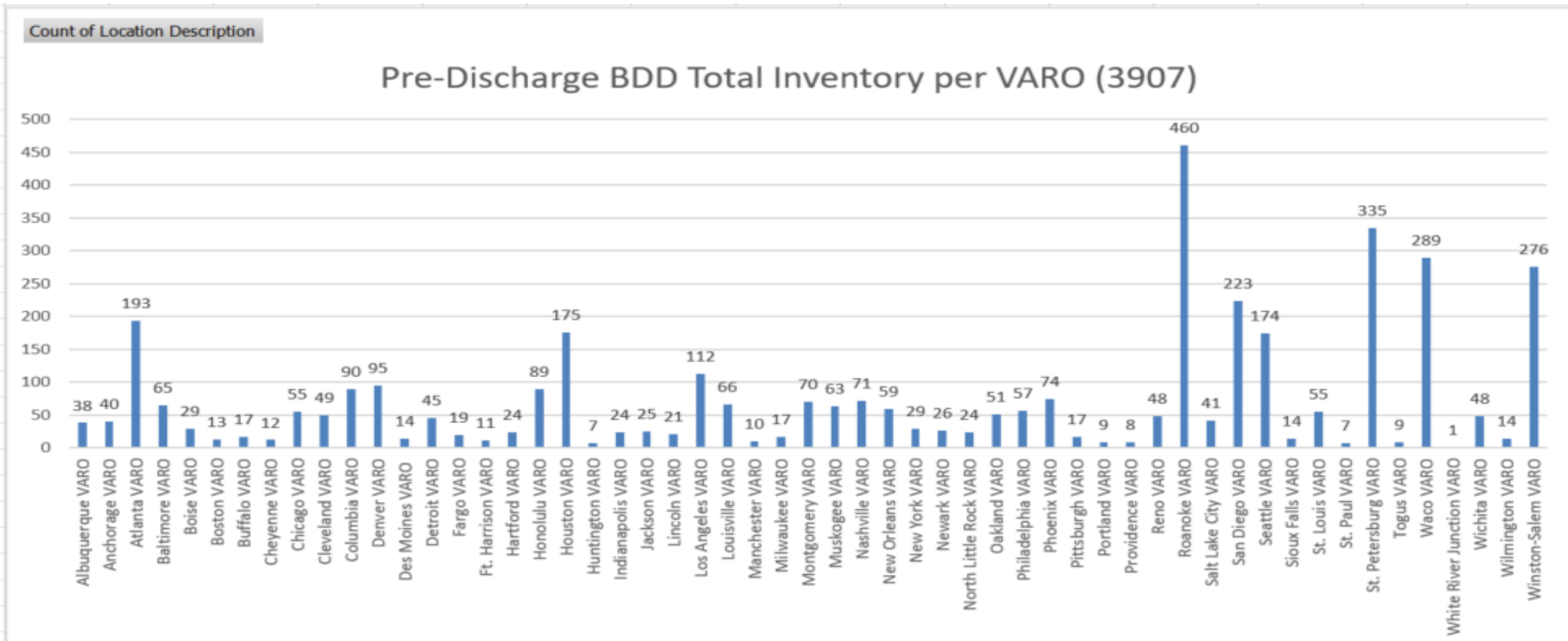
Veteran Experience scores for the most recent month are well above VBA targets. Scores and verbatim comments are analyzed each month to identify opportunities for improvement



Pre-Discharge Contract - Key Contract Provisions

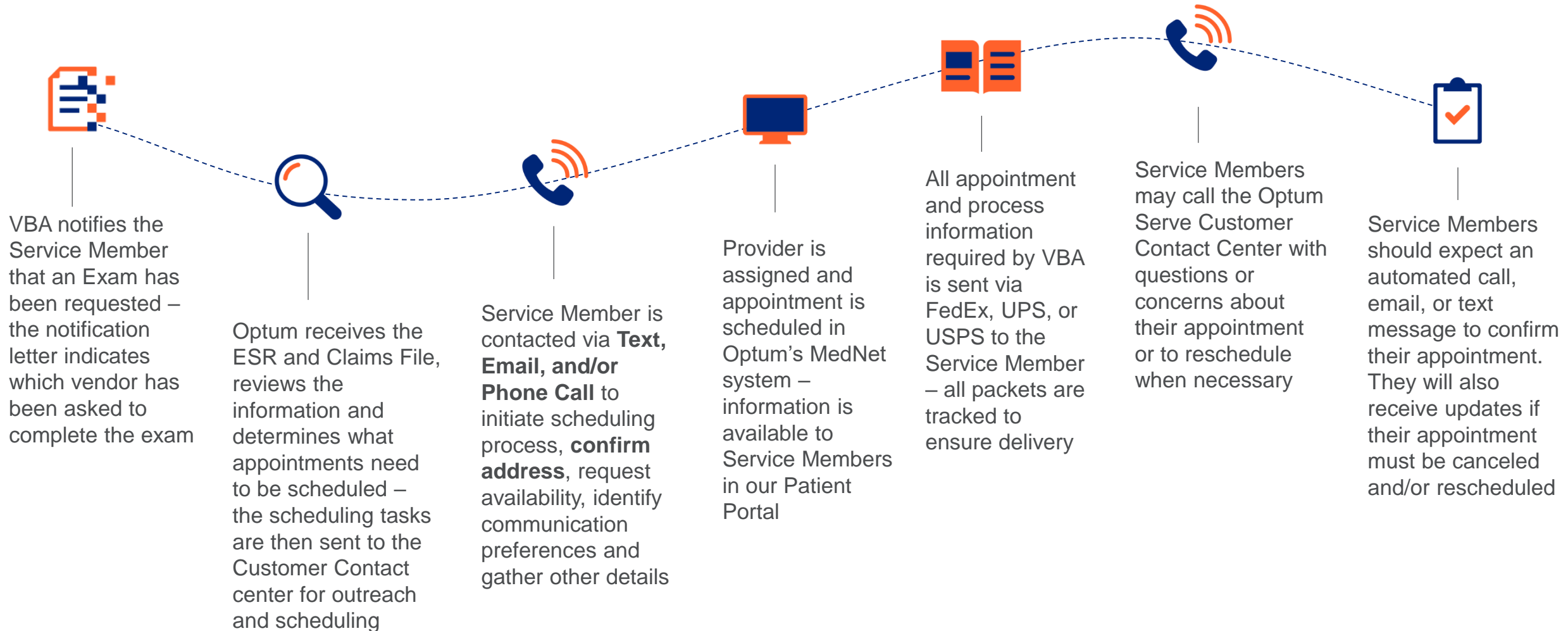
-  **Allocation of Workload** - Examination Scheduling Requests (ESRs) are sent to Vendors from each VARO – each vendor takes an equal share – some are sent to VHA based on capacity – distribution to vendors is random – ESRs may have one or more contentions
-  **Scheduling** - must be within 50 miles (general medical) or 100 miles (specialty) of Service Member's home – specific contact, scheduling, and rescheduling requirements – some exams may use telehealth or other non-face-to-face methods
-  **Conducting Exams** - must use Disability Benefits Questionnaires (DBQs) – electronic data exchange between MedNet and VA systems (VBMS/DAS) – examiner must review claims file for each exam – the Separation Health Assessment is key form for BDD exams
-  **Training and Certification** - all Examiners must complete prescribed training in VA TRAIN – specific licensing / credentialing for different types of examiners (Gen Med, BH, Audio, Opto, Dental, TBI) – facilities must meet OSHA/ADA requirements
-  **Separation Health Assessments** – shared DoD/VBA form that is used for BDD exams – each Service Member may get one SHA completed (may be done by MTF or VBA/VHA) – **Part A (Self Assessment)** must be completed in order for exam to be scheduled
-  **BDD vs IDES Exam Requests** – over the past few months – BDD exam requests are about two-thirds of the Pre-Discharge contract exam requests – VBA asks us to **prioritize IDES** exams for scheduling – BDD claims should be filed 90-180 days before separation
-  **Travel Reimbursement** – Service Members are **not reimbursed** for travel to and from exams – this is different than Veteran exams and is driven by applicable JTR provisions – while still under DoD, the Service Members unit may fund medically-related travel

Pre-Discharge BDD ESR Inventory by VARO – as of 11/6/23



- Optum Serve has received and processed over 33K Pre-Discharge BDD ESRs since July 2022
- On average, each Pre-Discharge ESR results in 2.4 appointments and approximately 11 completed DBQs
- The distribution of Pre-Discharge ESRs reflects the location of military bases and distribution of Service Members

Contact and Exam Scheduling Process



The Separation Health Assessment and Claims File

- The Separation Health Assessment (SHA) is a single separation examination which supports both the Department of Veteran Affairs (VA) disability compensation process and the Department of Defense (DoD) separation/retirement process
- The VA (and Optum Serve as one of its vendors) completes the SHA for Service Members applying for disability compensation through the BDD or IDES programs. The DoD conducts examinations for Service Members who are not participating in BDD or IDES, or have less than 90 days remaining on Active Duty
- The SHA includes:
 - Part A – a medical history questionnaire or self-assessment
 - Part B – a clinical assessment by a medical examiner
- The Part A should be completed **prior** to the VARO requesting an exam and should be present in the Service Member's claims file. If not present in the claims file, Optum Serve cannot schedule the exam.
- The examiner receives the Service Members claims file electronically prior to the exam. Service Members may bring additional documents to the exam and the examiner will review them and provide instructions for how the Service Member should submit the documents to the VA so they may be added to the claims file.
- During the exam, additional DBQs and appointments may be triggered based on the Service Member's answers to various questions on the SHA.

Releasing Information to Third Parties

- VBA exams performed by vendors are covered by the Privacy Act and not HIPAA
- Service Members may use one of three forms to allow a third party (Organization or Individual) to assist them with their claim and have access to their PII
- Service Member must specify what information may be shared with the third party (forms have different options to provide limited information or any/all information)
- Exam Scheduling Request has a data field to alert us when the Service Member has designated a third party and the applicable form should be part of the Claims File
- By contract we cannot provide completed exam documents / results to anyone but the VBA

VA Form 21-22

Department of Veterans Affairs

APPOINTMENT OF VETERANS SERVICE ORGANIZATION AS CLAIMANT'S REPRESENTATIVE

INSTRUCTIONS: Before completing the form, read the Privacy Act and Respondent Burden on Page 3. The VA Office of General Counsel maintains a list of all attorneys, claims agents, and Veterans Service Organization (VSO) representatives accredited by VA to assist in preparing, presenting, and prosecuting claims for VA benefits at: <https://www.va.gov/ogc/accreditation/index.asp>. You can search this list by name, state, or zip code. We recommend you use the list to confirm and validate VA accreditation before signing any contract or appointing someone to represent you on your VA benefits claim. If you prefer to have an individual assist you with your claim instead of a VSO, complete VA Form 21-22a, *Appointment of Individual as Claimant's Representative*. For more information, you can contact us through Ask VA: <https://ask.va.gov/>, or call us at 1-800-827-1000 (TTY:711). VA forms are available at www.va.gov/vaforms. After completing the form, use the mailing addresses provided on Page 4.

SECTION I: VETERAN'S INFORMATION

NOTE: You can either complete the form online or by hand. If completed by hand, print the information requested in ink.

OMB Control No. 2900-0321
Respondent Burden: 5 minutes
Expiration Date: 7/31/2026

VA DATE STAMP
(DO NOT WRITE IN THIS SPACE)

VA Form 21-22a

Department of Veterans Affairs

APPOINTMENT OF INDIVIDUAL AS CLAIMANT'S REPRESENTATIVE

INSTRUCTIONS: Before completing the form, read the Privacy Act and Respondent Burden on Page 3. The VA Office of General Counsel maintains a list of all attorneys, claims agents, and Veterans Service Organization (VSO) representatives accredited by VA to assist in preparing, presenting, and prosecuting claims for VA benefits at: <https://www.va.gov/ogc/accreditation/index.asp>. You can search this list by name, state, or zip code. We recommend you use the list to confirm and validate VA accreditation before signing any contract or appointing someone to represent you on your VA benefits claim. If you prefer to have a VSO assist you with your claim instead of an individual, complete, VA Form 21-22, *Appointment of Veterans Service Organization as Claimant's Representative*. For more information, you can contact us through Ask VA: <https://ask.va.gov/>, or call us toll-free at 800-827-1000 (TTY:711). VA forms are available at www.va.gov/vaforms. After completing the form, use the mailing addresses provided on Page 3.

SECTION I: VETERAN'S IDENTIFICATION INFORMATION

NOTE: You may complete the form online or by hand. If completed by hand, print the information requested in ink, and completely fill in each applicable check box to help expedite processing of the form.

OMB Control No. 2900-0321
Respondent Burden: 5 Minutes
Expiration Date: 7/31/2026

VA DATE STAMP
(DO NOT WRITE IN THIS SPACE)

VA Form 21-0845

Department of Veterans Affairs

AUTHORIZATION TO DISCLOSE PERSONAL INFORMATION TO A THIRD PARTY

INSTRUCTIONS: Use this form if you want to give the Department of Veterans Affairs (VA) permission to release your personal beneficiary or claim information to a third party. This form *may not be executed* by any beneficiary recognized as incompetent for VA purposes, nor can VA *accept* this form from any beneficiary recognized as incompetent for VA purposes.

SECTION I - VETERAN'S IDENTIFICATION INFORMATION

NOTE: You may either complete the form online or by hand. If completed by hand print the information requested in ink, neatly, and legibly to expedite processing of the form.

OMB Approved No. 2900-0736
Respondent Burden: 5 minutes
Expiration Date: 02/28/2026

VA DATE STAMP
(DO NOT WRITE IN THIS SPACE)

How Can You Help / Things to Remember



Accurate and Complete Claim

- Take the time to list all claimed conditions / contentions when filing the claim – and don't list unnecessary ones
- Many BDD ESRs only contain a few contentions and then when the Service Member shows up for the exam they bring up many other conditions / contentions
- An accurate and complete list of claimed contentions allows us to schedule exams for the appropriate length of time



Ensure the Claims File is Complete

- Make sure that Part A of the SHA is complete and included in the Claims File
- Take the time to include and organize medical records, service records, and lay statements / information that correspond to the claimed contentions
- Include recent diagnostic test results whenever possible – that can speed up the exam process
- Bring other supporting documents to the exam



Communicate and Engage with Us

- Please answer / respond to phone calls and/or messages from Optum Serve. All of our outbound phone calls should display our company name in the Caller ID field
- Please respond with your availability or non-availability, confirm your appointment, and let us know immediately if you have to reschedule or cannot make it
- **Let us know if you move!** This happens most often with BDD exams as Service Members relocate during terminal leave



Fully Participate with Exam Process

- Please complete all paperwork and answer all questions that are asked by the examiner and clinic support staff – they follow the questions in the required VBA forms
- If completing an SHA, be prepared to be contacted prior to your exam to review your health history
- In case of provider illness, inclement weather, or other emergencies – work with us to reschedule your exam as quickly as possible



The exam process works best as a cooperative process where we are all working together to ensure a timely, accurate, and high quality exam that follows VBA policy and guidelines.

Optum