VBMS Hands-on Training for VBMS Users

Instructor Lesson Plan

Time Required: 2.5 Hours

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| Lesson Description | |
| The information below provides the instructor with an overview of the lesson and the materials that are required to effectively present this instruction. | |
| TMS # | 4193069 |
| Prerequisites | Prior to this lesson, no knowledge of the program for the Veteran Service Representatives (VSRs) or Rating Veteran Service Representatives (RVSRs. |
| target audience | The target audience for VBMS Hands on Training for VBMS Usersis VSR/RVSR, Entry.  Although this lesson is targeted to teach the VSR/RVSR, Entry employee, it may be taught to other VA personnel as mandatory or refresher type training. |
| Time Required | 2.5 hours |
| Materials/ TRAINING AIDS | Lesson materials:   * VBMS Hands on Training PowerPoint Presentation * VBMS Hands on Training Trainee Handouts |
| Training Area/Tools | The following are required to ensure the trainees are able to meet the lesson objectives:   * Classroom or private area suitable for participatory discussions * Seating, writing materials, and writing surfaces for trainee note taking and participation * Handouts, which include a practical exercise * Large writing surface (easel pad, chalkboard, dry erase board, overhead projector, etc.) with appropriate writing materials * Computer with PowerPoint software to present the lesson material   Trainees require access to the following tools:   * VA TMS to complete the assessment * VMBS Access |
| Pre-Planning | * Become familiar with all training materials by reading the Instructor Lesson Plan while simultaneously reviewing the corresponding PowerPoint slides. This will provide you the opportunity to see the connection between the Lesson Plan and the slides, which will allow for a more structured presentation during the training session. * Become familiar with the content of the trainee handouts and their association to the Lesson Plan. * Practice is the best guarantee of providing a quality presentation. At a minimum, do a complete walkthrough of the presentation to practice coordination between this Lesson Plan, the trainee handouts, and the PowerPoint slides and ensure your timing is on track with the length of the lesson. * Ensure that there are copies of all handouts before the training session. * When required, reserve the training room. * Arrange for equipment such as flip charts, an overhead projector, and any other equipment (as needed). * Talk to people in your office who are most familiar with this topic to collect experiences that you can include as examples in the lesson. * This lesson plan belongs to you. Feel free to highlight headings, key phrases, or other information to help the instruction flow smoothly. Feel free to add any notes or information that you need in the margins. |
| Training Day | * Arrive as early as possible to ensure access to the facility and computers. * Become familiar with the location of restrooms and other facilities that the trainees will require. * Test the computer and projector to ensure they are working properly. * Before class begins, open the PowerPoint presentation to the first slide. This will help to ensure the presentation is functioning properly. * Make sure that a whiteboard or flip chart and the associated markers are available. * The instructor completes a roll call attendance sheet or provides a sign-in sheet to the students. The attendance records are forwarded to the Regional Office Training Managers. |

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| Introduction to VBMS Hands-on Training for VBMS Users | | |
| INSTRUCTOR INTRODUCTION | | Complete the following:   * Introduce yourself * Orient learners to the facilities * Ensure that all learners have the required handouts |
| time required | | 0.25 hours |
| Purpose of Lesson  Explain the following: | | This lesson is intended to provide the VSR/RVSR an overview of the VBMS program; the different screens and functions that are available for use and helpful tips and tricks. This lesson will contain discussions and exercises that will allow you to gain a better understanding of:   * VBMS |
| Lesson Objectives  Discuss the following:  Slide 2  Handout 2 | In order to accomplish the purpose of this lesson, the RVSR or VSR will be required to accomplish the following lesson objectives.  TheVSR or RVSRwill be able to:   * Understand the enrollment process * Identify strong passwords * Understand the layout and functionality of screens in VBMS * Understand the EP Screen * Identify when and how to annotate a document * Navigate the Development screen * Understand the VBMS Development process | |
| Explain the following: | Each learning objective is covered in the associated topic. At the conclusion of the lesson, the learning objectives will be reviewed. | |
| Motivation | VBMS (Veterans Benefits Management System) was implemented to provide more timely and responsive customer service to Veterans and their families. For Veterans, VBMS results in faster, higher-quality and more consistent decisions. For employees, VBMS results in a more user-friendly claims processing system with better access to information across ROs, faster system updates, reduced application switching and automated decision recommendation tools that increase consistency. VBMS will benefit both Veterans and VBA employees by providing the tools the workforce needs to quickly and accurately capture and process claims while meeting growing demand. | |
| STAR Error code(s) | TBD | |
| References  Slide 3  Handout 3 | Explain where these references are located in the workplace.   * [VBMS Intranet](http://vbaw.vba.va.gov/VBMS/index.asp) * [VBMS SOP](http://vbaw.vba.va.gov/VBMS/Resources_Technical_Information.asp) | |

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| Topic 1: VBMS Introduction | |
| Introduction | This topic will provide the trainee a detailed overview of the different screens and some functionality of the Development chevron. A good overview is essential to efficient use of the system. |
| Time Required | 0.75 hours |
| OBJECTIVES/ Teaching Points | Topic objectives:   * Understand the layout of VBMS * Understand the EP Screen * Identify when and how to annotate a document. |
| VBMS Access  Slide 4  Handout 4 | To access the VBMS application, you must receive access credentials based on your user role. User registration and authentication is managed by outside identity providers, such as Common Security Services (CSS), Common Security User Manager (CSUM), and Common Security Employee Manager (CSEM).  Your supervisor can register for access credentials on your behalf, either with a paper form or applying electronically in the CSEM system. Requests can be made for a single user with a single role, a single user with multiple roles, or group requests can be made for multiple users with the same user role.  After a request is submitted, allow 24 hours for access to be granted. When the registration process is complete, you and your supervisor will receive a user name and a temporary password by e-mail. For security reasons, you must change the initial password when you first log in to the VBMS application.  Login screen, Start>All Programs>VBAPPS>VBMS>VBMS  Station ID: Every station has its own ID or code.  User ID: Usually same as your LAN Username. Example VSCJVeter, or ADJJVeter |
| Password  Slide 5  Handout 5 | Password strength is critical component of system security that is defined as how well a password resists guessing and brute-force attacks.  To ensure the security of Veteran data, passwords must meet the following minimum requirements:  • Must be eight characters in length.  • Six of the characters cannot occur more than once (AAAaaa11% is acceptable, but AAAAaaa11% is not).  • Must contain three of the four following types of characters:  • Lowercase English letters (a - z).  • Uppercase English letters (A - Z).  • Numerals (0, 1, 2...9).  • Special characters as follows, with no: [colon] or [SPACE]:!  **@ # $ % ^ & \* () + { } | " < > ? ' . / [ ] \ - = ~ `**  **Note:** If you are logging in for the first time, you must change your password immediately. |
| Main Screens for VBMS  Slide 6  Handout 5 | The following Menu Bar links each provide a main screen from which you can view, enter, edit, and save data.  **Work Queue** - From the Work Queue link, users can access different table views that include general details of outstanding work items associated with VBMS claims.  **Intake** - From the Intake Link, users can view and manage the process of preparing hard-copy documents for shipping to an intake site.  **Unassociated Documents** - From the Unassociated Documents link, users can view and manage documents that are not currently associated with a specific Veteran. |
| Work Queue Tour  Slide 7-8  Handout 6 | The My Work Queue tab shows all work items assigned to you to complete, including work items that are new (not worked) and work items that you have worked on, but that are not yet completed (pending).  1. At any point/ from any page you can return to this queue by clicking “Work Queue”  2. Search for any Veteran/Claim – just as you could in SHARE  3. Use these to filter the Work Queue you are currently viewing (useful for larger queues such as the “Unassigned Queue”)  4. Use this tab to set the info/columns you want to view  5. Indicates there is evidence in the eFolder that has not been viewed/opened  6. Click on ID, EP, Name or File # to access folder  7. This button (next to the Veteran’s name) will allow you to open the claim in a new window. Using this functionality will allow you to have multiple screens open for the Veteran at once – for example the documents tab on one screen and the development plan on another. |
| Veteran Menu  Slide 10  Handout 7 | The Veteran Menu provides different informational views, and also provides a link to the main Veteran Profile screen, allowing users to quickly navigate back from other views. Similar information shows in the Veteran Summary Pane; however, editing features are only available when you open the view on the main screen.  Each view provides different options from the Actions menu, which are detailed in the following sections:  • Profile  • Dependents  • Military Service  • POA  • Intent to File\*  \*Note- It is essential that the date of March 24, 2015, is emphasized. Stress the need for review of the Intent to File screen and its importance for assigning appropriate effective dates. |
| Claims Menu  Slide 11  **Handout 7** | The Claims Menu provides a list of the open claims associated with the Veteran; clicking an open claim from the list will navigate to the Claim Details screen for that claim.  Clicking the All Claims link shows a table view of claims in any status that are associated with the Veteran. You can click the plus [+] icon to display details a about claims in the table.  Options available from the Actions menu are:  • Create DCS  • New Claim  • Upload Document |
| Documents Menu  Slide 12  **Handout 8** | Clicking this link opens the eFolder.  The eFolder Documents tab shows general information about all the documents in the eFolder, including any bookmarks, the date the document was received, and the type and the subject of the document. As with other table views, you can drag a column to the left or right to change the order of the table, and you can further customize the view by using the Show/Hide Columns button.  The Narrow Results pane and the Veteran Summary pane are both available from the eFolder. An orange arrow icon appears in the table view beside the last opened document, and you can easily view that document by clicking the Last Opened button. Documents that you opened when they were new will show a gray checkmark in the New Mail column. |
| Actions Menu  Slide 13  Handout 9 | Options available from Actions menu are:  • Create DCS – generally and IPC or Triage function  • New Claim  • Upload Document  • Open (Read Only)  • Move  • Edit Properties  • Manage Duplicates  • Mark No Evidentiary Value  • Unmark No Evidentiary Value  • Move to/Remove from Archive Bin  • Mark as Open  • Mark as New  • Annotate |
| Virtual VA Bridge  Slide 14  Handout 9 | The Virtual VA Documents tab shows documents that have been received by Virtual VA (VVA) Paperless Claim Processing. From the Virtual VA table view, you can see the receipt date of the document, the document type and subject, the treatment or condition that the document relates to, as well as the treatment start and end date.  Virtual VA documents are read-only; this means the documents can be viewed. However, other features, such as bookmarks and annotations, are not available. When you click a link in the Document Type column, or choose Open (Read Only) from the Actions menu, the document opens in a new window. |
| Annotations  Slide 15-16  Handout 9 - 10 | To view or make annotations to an eFolder document, click the annotation icon in the Document Type column of the eFolder table view. The document will open in a separate browser window. Click the Close Expanded View link to show the VBMS Menu Bar at the top of the screen.  To view a note annotation, click the note icon on the document. Other annotation types, such as stamps and callouts, will show on the document text.  **To make an annotation:**  1. Click the **Add an Annotation** icon. Your cursor will change to a  selection tool.  2. Left click and drag a box on the area of the document where you want to create an annotation.  3. Release the mouse button. The Annotation dialog appears.  4. Choose an annotation type from the list on the left. This example creates a Note type annotation.  5. Type the annotation text in the text field provided. You can change the color of the note by clicking the color box at the bottom of the dialog.  6. Click **OK** to close the Annotation dialog.  7. Click **Save** from the toolbar to save the annotations to the document.  8. Other types of annotations are available as well, such as callouts, stamps and lines. Using the text option will allow you to apply underlining, strikeouts and highlights to the text of the document. |
| Topic 2: Claims Navigation | |
| Introduction | This topic will allow the trainee to efficiently navigate the claims screens and utilize features of VBMS claims screens to provide timely and accurate claims development. |
| Time Required | 0.75 hours |
| OBJECTIVES/ Teaching Points | Topic objectives:   * Navigate Development screen. * Understand the VBMS Development process |
| What is a claim?  Slide 17  Handout 11 | A claim is a formal request for benefits that is submitted by a Veteran, or by a person or organization authorized to act on a Veteran's behalf. Claim establishment begins with the receipt of a Veteran's VA Form 21-526.  The life cycle of a claim within VBMS begins by determining if a claim already exists. If the claim exists, then you can perform a search of VBMS to access it. If a claim does not yet exist, then the claim is created. Claims might also be established through other systems, such as VonApp Direct Connect (VDC) or VA legacy systems.  *Claim* and *work item* as terms are often used interchangeably. However, *claim* refers only to the information gathered from the Veteran's VA Form 21-526 and associated contentions, and is identified by an automatically generated claim ID.  *Work item* refers to a collection of claim details and artifacts that are stored together and are identified by an automatically generated work item ID. *Work items* represent tasks that must be completed, information that must be gathered and/or evidence that must be documented to fully process a claim. |
| Claim Information Bar  Slide 18  Handout 11 | Below the claim title is the *Claim Information Bar*. This shows information regarding the claim, including a Go to Work Item link, the number of days the claim has been pending (open), the date and status of the claim, the suspense date, and the team and/or user to which the claim has been assigned. |
| Button Bar  Slide 19  Handout 11 | The *Button Bar* includes buttons to Edit Claim Detail, Create DCS, Upload Document, or create a New Claim.  When the work item is ready to be completed, the Complete Work Item button will show in the button bar. |
| Claim Details | Below the Claim Information Bar is the Claim Details area. Clicking the arrow will expand or collapse the Claim Details, which includes more information specific to the claim. |
| Development Task Bar  Slide 20  **Handout** 12 | The Development Plan Task Bar appears under the Claim Information bar.  Clicking the following main links will show information that can be used to complete Development Plan tasks (process a claim).  The associated Chevrons are:   * Contentions List * Development * Letters * Tracked Items * Claim Notes * Deferrals |
| Contentions  Slide 21  **Handout** 12 | Contentions are conditions or diagnoses that a Veteran “contends” are the cause of a current disability, and may qualify for benefits if directly related to a Veteran's military service. A claim can include one or more contentions.  Scanned contentions are not considered verified until a VSR views the contention, and edits the contention type and classification. Until then, unverified contentions can be viewed in VBMS, and the information is retained in FileNet, but is not stored in Corp-D until they are verified. |
| Creating Contentions  Slide 22  **Handout** 12 | 1. From the **Claim Details** screen, click the **Add Contention** button.  2. In the **Contention** field, enter a contention description. As you type, contentions that might apply will be suggested.  3. Click the **Classification** down arrow and choose a classification from the list.  • Classifying a contention is required if the Medical field is set to yes.  • If the Medical field is set to no, adding a classification is optional.  4. Click the **Date of Contention** field to select a date from the pop-up calendar. Otherwise, the contention date will default to the date of the claim. The contention date cannot be before the date of the claim.  5. The **Verified** field is automatically populated with a yes/no value once you save the contention.  • Scanned contentions will show No until a classification and type are entered.  • Manually entered contentions always show Yes.  6. Click the **Type** down arrow and choose a type from the list.  • New  • Increase  • Secondary  • Reopen  7. Click the **Medical** down arrow and select Yes or No to indicate if the contention relates to a medical issue. |
| Special Issues  Slide 23  **Handout** 12 | If special issues apply to the contention, click the Special Issue field and select an issue from the list, or type in the field and issues will be suggested as you type.  You can add multiple special issues, but you cannot enter the same special issue to a contention more than once. As you click each special issue, they will appear in the area below the Special Issue field. Click the [X] to remove a special issue from the list. |
| Development Chevron  Slide 24  **Handout** 13 | When you establish a claim, VBMS automatically creates four required work  items (tasks). Tasks can be comprised of one or more actions which must be  completed in order to set the status of that task to complete. You can navigate to the development plan from the Claims Detail screen, or the Work Item ID screen.  The four required tasks are:  • Verify Veteran Profile  • Verify Veteran Service  • Prepare Contention  • Obtain STR Evidence  Contentions are often added during claim establishment, but can be added or modified throughout processing. The status of each task is indicated as follows:  • **Not Started** – shows a gray checkmark icon on the right of the task bar  • **In Progress** – shows a yellow dot on the right of the task bar  • **Complete** – shows a green checkmark icon on the right of the task bar |
| Letter Chevron  Slide 25  **Handout** 13 | During claim development, you may need to create correspondence for several purposes, including: requesting evidence from a claimant, a private third-party, or a National Guard or Reserve command; advising the claimant of the current claim status; notifying the claimant of requests for information that were sent to a third-party; or for third-party follow up purposes.  To create letters, you can select and preview standard paragraphs, or create custom paragraphs to include. Creating letters will often generate a tracked item with a set suspense date, and creating some letters will also automatically generate others. When created, letters remain in a pending status until finalized; during this time, the letter can be added to or otherwise edited. Once the letter is finalized, it will be prepared for mailing; you can view the letter, but it cannot be modified or deleted.  Letters often need to be finalized together. For example, you must finalize a 5103 notice before you can process and finalize secondary letters, including follow-up and subsequent development letters. Before you can finalize a third party or follow up letter, you must complete a subsequent development letter to notify the Veteran of the request for information from a third party.  Tracked items will also be created when adding letters, to track when a response is expected and/or received. |
| Tracked Items  Slide 26  **Handout** 14 | From the Tracked Items link you can view a list of all items associated with a claim and the status of the item as it goes through the development process. Many tracked items are created and closed automatically as work items are completed, and you can also add and edit tracked items manually. Tracked item functions are available from both the Claim Details screen and the Work Item ID screen.  For open claims, non-actionable tracked items - which are open tracked items in which the suspense date has expired and no response was received in reply to the request - are closed automatically. One day (24 hours) after the suspense date expires, VBMS closes the tracked item, and updates the closed date.  In addition to automatic tracked items, you can manually add tracked items to maintain a record of outstanding tasks for the claim. You can then update the item as information arrives and you can close the item when it is no longer needed. You can also add and edit tracked items from the Work Item ID screen. |
| Exam Requests | Reserved for future functionality. The functionality for this chevron is pending. |
| Claim Notes  Slide 27  **Handout** 14 | From the Claim Notes link in the Development Plan Task Bar, you can view notes that are associated with a specific claim; this includes both temporary and permanent notes that are created by users, as well as notes that are automatically created when actions take place on the claim.  As with other table views, you can drag a column to the left or right to change the order of the table, and further customize your view using the Show/Hide Columns button.  The Veteran Profile Notes link provides a different notes view, which shows a history of all notes associated with the Veteran and the Veteran's claims. You can change to the Veteran Profile notes view by clicking the Notes link from the Veteran Profile menu bar.  The Add Note icon is available from Veteran Profile and Claim Detail screens. |
| Deferrals  Slide 28-29  **Handout** 14 | Deferrals are initiated on work items that cannot be currently completed; perhaps because contention information is incomplete, incorrect, changed or requires verification. Work items with pending deferrals cannot be marked complete until the associated deferrals are mitigated by a supervisor.  The Deferrals link appears in the task bar only when viewing a claim with work items that are or were deferred. From this link you can view the deferral history of the claim, including pending and mitigated deferrals. The following information is available for each deferral:  • the date and time the deferral was created  • status  • the RO that deferred the claim  • rework phase  • primary and detailed deferral reason  • any additional reasons  • contentions, including the original and current titles, if a contention was  renamed  • additional comments  • associated documents  • deferral mitigation, including the date, User, RO, and reason |

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| Topic 3: Customization | |
| Introduction | This topic will allow the trainee to customize VBMS for a more personal preferential set up. |
| Time Required | 0.5 hours |
| OBJECTIVES/ Teaching Points | Topic objectives:   * Identify the aspects of VBMS that can be customized * Understand the benefit of customization * Become familiar with the Narrow Results pane |
| Customizing Table Views  Slide 30  Handout 15 | At the bottom of the screen, you can modify the number of items that show in table views by clicking the Items per page arrow, and choosing a number from the list.  You can also skip to a specific page by entering a number in the Skip to Page field and clicking Go, or by using the First, Previous, Next or Last button bar.  Drag a column header to the left or right to relocate the column within the table.  You can change the order of items shown in tables by clicking any of the column headers, and you can sort by more than one column. |
| Sorting Column headers  Slide 31-32  Handout 15 | Click the header of the first column you wish to sort by.  2. While holding down the **Shift** key, click the header of the second column, and so on.  3. A [1] appears next to the first chosen column, and a [2] appears next to the second chosen column, etc.  4. Click any column header to return to the default sorted view. |
| Narrow Results Pane  Slide 33  Handout 15 | The Narrow Results Pane is available on the left of many main screens. It  provides choices to customize the items that are listed on the main screen table view. You can open and close the pane by clicking the scroll bar.  You can expand the sections and enter criteria or make choices to indicate items you would like to show. The Clear and Collapse links at the top of the pane will clear filter selections, and collapse any sections that had been expanded.  For some views, you will need to click the Filter button to show your selections. When provided, you can save your choices with the Save button, and manage views that you have saved with the Manage button. |
| Regional Office Specific Topics | **This row should be included ONLY in the last topic before the Practical Exercise.**  At this time add any information pertaining to:   * claim assignment in VBMS * Second signature procedures. * Identify tips and tricks related to efficient navigation and use of the VBMS system |

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| Lesson Review, Assessment, and Wrap-up | |
| Introduction  Discuss the following: | The VBMS Hands on Training for VBMS Users lesson is complete.  Review each lesson objective and ask the trainees for any questions or comments. |
| Time Required | 0.25 hours |
| Lesson Objectives | You have completed the VBMS Hands on Training for VBMS Users lesson.  The trainee should be able to:   * Understand the enrollment process * Identify strong passwords * Understand the layout and functionality of screens in VBMS |
| Assessment | Remind the trainees to complete the on-line assessment in TMS to receive credit for completion of the course.  The assessment will allow the participants to demonstrate their understanding of the information presented in this lesson. |