Letter Creator

Instructor Lesson Plan

Time Required: 2.25 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 # | 4456204 |
| Prerequisites | None |
| target audience | The target audience for Letter Creator is Claims Assistants (CA).Although this lesson is targeted to teach the Claims Assistantemployee, it may be taught to other VA personnel as mandatory or refresher type training. |
| Time Required | 2.25 hours |
| Materials/TRAINING AIDS | Lesson materials:* Claims Assistant PowerPoint Presentation
* Claims Assistant Trainee Handouts
* Claims Assistant Job Aid
 |
| 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
* Letter Creator User Guide
* Letter Creator
* VBMS
 |
| 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 Letter Creator |
| 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 LessonExplain the following: | This lesson is intended to teach how use Letter Creator. This lesson will contain discussions and exercises that will allow you to gain a better understanding of: * Locating Letter Creator
* Creating a Letter
* Uploading a Letter to VBMS
* Letters utilized in the Intake Processing Center
 |
| Lesson ObjectivesDiscuss the following:Slide 2 Handout 2 | In order to accomplish the purpose of this lesson, the Claims Assistant (CA) will be required to accomplish the following lesson objectives.TheCAwill be able to: * Reproduce logging into Letter Creator
* Understand how create a notification letter via Letter Creator tool
* Understand how to upload a document into VBMS
* Review letters available within the area of Intake Processing Center
 |
| 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 | This lesson will introduce an entry level employee to Letter Creator.  |
| ReferencesSlide 2 Handout 2 | Explain where these references are located in the workplace.All M21-1 references are found in the [CPKM](https://vaww.compensation.pension.km.va.gov/).* Letter Creator User Guide
* [M21-1, Part I, Chapter 1, Section B, Notification Requirements for an Incomplete Application](https://vaww.vrm.km.va.gov/system/templates/selfservice/va_kanew/help/agent/locale/en-US/portal/554400000001034/content/554400000014065/M21-1-Part-I-Chapter-1-Section-B-Duty-to-Notify-Under-38-USC-5102-and-5103?query=letter%20creator)
* [M21-1, Part III, Subpart ii, Chapter 3, Section E, Handling a Disagreement with a Decision Not Submitted on VA Form 21-0958, When Required](https://vaww.vrm.km.va.gov/system/templates/selfservice/va_kanew/help/agent/locale/en-US/portal/554400000001034/content/554400000033133/M21-1-Part-III-Subpart-ii-Chapter-3-Section-E-Establishing-an-Appellate-Record?query=letter%20creator)
* [M21-1, Part I, Chapter 3, Section B, Notification Requirement Where Appointment Forms Lack 38 USC 7332 Election](https://vaww.vrm.km.va.gov/system/templates/selfservice/va_kanew/help/agent/locale/en-US/portal/554400000001034/content/554400000014077/M21-1-Part-I-Chapter-3-Section-B-A-Representatives-Right-to-Notification-and-Review-of-Records?query=letter%20creator)
* [M21-1, Part III, Subpart ii, Chapter 1, Section C, Handling a Form or Application With an Alternate Signature](https://vaww.vrm.km.va.gov/system/templates/selfservice/va_kanew/help/agent/locale/en-US/portal/554400000001034/content/554400000014112/M21-1-Part-III-Subpart-ii-Chapter-1-Section-C-Initial-Screening-Policies?query=letter%20creator)
* [M21-1, Part III, Subpart ii, Chapter 1, Section C, Rejecting an Outdated Version of VA Form](https://vaww.vrm.km.va.gov/system/templates/selfservice/va_kanew/help/agent/locale/en-US/portal/554400000001034/content/554400000014112/M21-1-Part-III-Subpart-ii-Chapter-1-Section-C-Initial-Screening-Policies?query=letter%20creator)
* [M21-1, Part III, Subpart ii, Chapter 1, Section B, Processing Unidentifiable Mail in CM](https://vaww.vrm.km.va.gov/system/templates/selfservice/va_kanew/help/agent/locale/en-US/portal/554400000001034/content/554400000014111/M21-1-Part-III-Subpart-ii-Chapter-1-Section-B-Mail-Management?query=unidentifiable)
* [M21-1, Part III, Subpart ii, Chapter 1, Section B, Final Attempt to Obtain an Updated Address for Undeliverable Claimant Notification and Essential Mail](https://vaww.vrm.km.va.gov/system/templates/selfservice/va_kanew/help/agent/locale/en-US/portal/554400000001034/content/554400000014111/M21-1-Part-III-Subpart-ii-Chapter-1-Section-B-Mail-Management?query=return%20mail#6)
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| Topic 1: Locating Letter Creator |
| Introduction | This topic will allow the trainee to locate where the Letter Creator system is in the Compensation Service Intranet Site and how to set up personal settings. |
| Time Required | 0.25 hours |
| OBJECTIVES/Teaching Points | Topic objectives:* Compensation Service Intranet Site
* Rating Jobs Aids
* Letter Creator Link

The following topic teaching points support the topic objectives: * Learn to navigate Compensation Service Intranet Site
* Identify Rating Job Aids Page
* Locate Letter Creator and Letter Creator User Guide
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| Letter CreatorSlide 3*Handout 3* | Veterans Benefits Management System (VBMS) is the primary system for eFolder storage, strongly utilized for workload management, and the development process. Letter Creator is an additional system utilized for letters to the Veteran which are not available within VBMS. |
| Locating Letter CreatorSlide 5-6Handout 3 | Go to the Compensation Services Intranet site: [Compensation Service Intranet](https://vbaw.vba.va.gov/bl/21/index.htm) |
| Letter Creator-Initial SetupSlide 7Handout 4 |  |
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| Exercise | Have the students sign in to the Compensation Service Intranet Site, locate the Rating Job Aids link. Select the Rating Jobs Aid link and proceed to the Rating Job Aids Intranet page. From the Rating Jobs Aid Intranet Page, locate the Letter Creator and Letter Creator User Guide Links.  |
| note(s) | Direct the students on the steps to locate the Letter Creator link from the overhead projector.  |
| DEMONSTRATION | Demonstrate the steps of locating the Letter Creator. |
| Topic 2: Creating a Letter |
| Introduction | This topic will allow the trainee to learn how to use the Letter Creator. |
| Time Required | 0.25 hours |
| OBJECTIVES/Teaching Points | Topic objectives:* Understand how create a notification letter via Letter Creator tool.
 |
| Creating a LetterSlide 7-15Handout 5-10 | First, ensure VBMS is open to the proper Veteran. Enter the Veteran’s Social Security number or File number into the field and click the green Submit button. Letter Creator will populate the name, address, salutation, and POA (if one is of record) from VBMS. It will also extract other points of data not seen on the screen above that is stored in the tool for use in certain letters. * This data includes DOD and Periods of Service.

If a letter is needed where there is no Veteran record or address then the address can be manually entered into the tool. If an address is entered manually where a Veteran record does exist, the tool can be used to update the Veteran record with the address entered into the tool. |
|  | To begin, enter the Veteran’s file number in the SSN or File Number Field as shown below:  |
|  | Once the “Submit” button is clicked this will pull the Veteran’s profile information from VBMS and populate it into the tool as shown below. A loading screen will appear and go away once the tool is finished loading. |
|  | Select the appropriate drop down from “Choose the Area”. Then, select the type of letter that needs to be sent to the Veteran/claimant.As shown below there is a field for a date. Throughout the tool there are various areas where a date needs to be entered. Where a date should be entered, there will be a little calendar next to the field. Clicking the picture of the calendar will bring up a full calendar where the date can be selected by clicking on the date.  |
|  | When all options and entries are made, click the “Create Letter” button. This will create the letter in a word document that may not appear instantly on screen but will be running on the desktop. Find it on the taskbar and click on the letter to maximize it. The letter should appear as shown and be complete. Do not save the letter at this point. Do not close the letter.  |
|  | After reviewing the letter and making any necessary changes, go back to the tool in excel. It should be blinking on the taskbar in Windows. Once back in the tool, a popup message will appear that says, “Click OK when you are finished making changes and are ready to upload the letter to VBMS.” Click OK Note: At this point the tool will save the letter as a PDF to a specific location. The tool will save the letter to your desktop in a folder called “LetterBank”. The tool will create the folder automatically if it does not already exist.A pop up will appear that will notify you of the location to which the PDF was saved.  |
| Topic 3: Uploading a Letter |
| Introduction | This topic will demonstrate how to upload a document into VBMS. |
| Time Required | 0.25 hours |
| OBJECTIVES/Teaching Points | Topic objectives:* Understand how to upload a document into VBMS
 |
| Creating a LetterSlide 18Handout 11 | Once the “OK” button is clicked the tool will cause VBMS to navigate to the Upload Document screen. The tool will also fill out everything on that screen except for the File Location. The file field will need to be manually completed by the user. The Letter Creator will automatically update the “Category – Type” field to “Correspondence: Correspondence”. The user can manually edit this field if necessary. To further assist students learning this action please show students the following Video:[Uploading a Document](http://vbaw.vba.va.gov/vbms/videos/Upload_Document_VBMS_Minute.wmv) Note: This video can be found on the [VBMS Training](https://vbaw.vba.va.gov/VBMS/multimedia.asp) page by searching “Uploading a Document”.  |
| Topic 4: Letters Available |
| Introduction | This topic will allow the trainee to learn the types of letters available in Letter Creator. |
| Time Required | 0.25 hours |
| OBJECTIVES/Teaching Points | Topic objectives:* Review letters available within the area of Intake Processing Center
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| Types of LettersSlide 20Handout 12 | Attachment A lists the available letters within the IPC section of Letter Creator.  Provide some time for students to review and discuss the list of letters available.  |
| DEMONSTRATIONSlide 21 | Instructor will provide a demonstration of creating a letter by utilizing Letter Creator. Please ensure during demonstration only information which should be uploaded into VBMS is accurately processed.Please provide students time to review letters available and the references provided at the beginning of this lesson. **Instructor**: Provide the Claims Assistants time to attempt multiple letters to see what information is generated by Letter Creator.Opportunity to experience Letter Creator is provided in Practical Application questions 5-14. |
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| Practical Exercise |
| Time Required | 1 hour |
| EXERCISE | Answer the questions in the Handout. Some of the answers will need to be found by opening Letter Creator and utilizing the application. Ask if there are any questions about the information presented in the exercise, and then proceed to the Review. |
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| Lesson Review, Assessment, and Wrap-up |
| IntroductionDiscuss the following: | The Letter Creator lesson is complete. Review each lesson objective and ask the trainees for any questions or comments. |
| Time Required | .25 hours  |
| Lesson Objectives | You have completed the Letter Creator lesson. The trainee should be able to: * Reproduce logging into Letter Creator
* Understand how create a notification letter via Letter Creator tool
* Understand how to upload a document into VBMS
* Recognize commonly used letters utilized by Intake Processing Center
 |
| 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. |