

# Job Aid

## Sending Packages in VBMS-Core

### OVERVIEW

Phase One of the Centralized Benefit Communication Management (CBCM) initiative, implements the Package Manager functionality in VBMS. This functionality allows users to submit electronic communications for printing and mailing to a centralized location. Package Manager retains the information regarding the correspondence communications being created and mailed, to include correspondence letters, attached forms, and mailing dates. Package Manager allows you to add recipients. Recipient(s) are individuals or organizations (i.e. Veteran Service Organizations Representatives).

Once the package is submitted by VBA staff, it is transmitted to the OBPI vendor (CSRA) for final consolidation. CSRA will transmit the package to IT Operations and Services (ITOPS) for printing and mailing to recipients. Once the package is mailed, ITOPS will transmit the status through CSRA back to VBMS.

### Package Manager Functionality

Veteran Service Representatives can now accomplish the following tasks:

- [Current Functionality Reminder](#)
  - o [Inserting Power of Attorney Information](#)
  - o [Finalize a Letter](#)
- [Creating Packages in VBMS Core via Letter Finalization](#)
- [Creating Packages in VBMS Core via the eFolder](#)
- [Access the Package Manager](#)
  - o [Creating or deleting a package](#)
  - o [Add documents to a package](#)
  - o [Add standard enclosures](#)
  - o [Add recipients to a package](#)
- [Reference the SOJ Mailing Address List](#)

*This job aid contains fictitious Veteran information on various images for training purposes*

# Job Aid

## CURRENT FUNCTIONALITY REMINDER

### INSERTING POWER OF ATTORNEY INFORMATION

**PRIOR TO THE LETTER FINALIZATION** ensure that necessary Power of Attorney address information is added. The address information will be added into the Package Manager.

For Veteran Service Organizations, use the Regional Office Mailing List (see separate document entitled, “SOJ Address List for VSOs\_CBCM”) to determine the mailing address to enter for these organizations.

The screenshot shows a web application interface for a 'Test Veteran' (File #: 444151120). The main heading is '110 - Initial Live Comp < 8 issues'. Below this, there are navigation tabs: 'Contentions List', 'Development', 'Letters' (highlighted), 'Tracked Items', 'Exams', and 'Claim Notes'. The 'Letters' tab is active, showing a 'Standard 5103 Notice' form. The form has buttons for 'Preview', 'Save', and 'Delete'. Below the form, there is a table with columns for 'TITLE', 'NAME', and 'ADDRESS'. The 'ADD NEW POA INFORMATION' section is highlighted with an orange border. It contains the following fields:

TITLE	NAME	ADDRESS
Search POA's: 101 - CHRISTOPHER F ATTIG	* Name: CHRISTOPHER F ATTIG	
Title: POA Attorney	* City: SAN FRANCISCO	
* Address: CHRISTOPHER F ATTIG ATTIG LAW FIRM, PLLC P.O. BOX 7775	* State: CA	
	* Zip Code: 94120	

Buttons: Cancel, Save POA

Figure 1 - Letter Interview Screen Highlighting the Power of Attorney Functionality with Complete Information

# Job Aid

## CREATING PACKAGES IN VBMS CORE VIA LETTER FINALIZATION

Upon letter finalization, a new package will be created.

Letters in VBMS Core that will create Packages when finalized are:

1. Finalization of a letter on the Letters Chevron of the Claim Details Screen.
2. Generation of the Request for Application letter through claim establishment.
3. Generation of the Standard 5103 Notice through claim establishment.

Test Veteran File #: 444151120

110 - Initial Live Comp < 8 issues

Go to Work Item | Days Pending: 1 | Date of Claim: 12/27/2017 | Status: OPEN | Suspense Date: 01/06/2018 | App Form: N/A | Team Assigned to: N/A | Assigned to: N/A

EXPAND CLAIM DETAILS

Contentions List | Development | **Letters** | Tracked Items | Exams | Claim Notes

Letters Add New Letter Finalize Letters

Success. The letters have been successfully finalized.  
Packages have been created and are waiting review. Click [here](#) to open Package Manager.

Filter Letters:  Showing 1 - 2 of 2

Letter	Status	Date Sent
<a href="#">Subsequent Development Letter</a>	Finalized	12/28/2017
<a href="#">Standard 5103 Notice</a>	Finalized	12/28/2017

First Previous 1 Next Last

Figure 2 - Finalization of a letter from the Letters Chevron of the Claim Detail Screen



NOTE: You are able to access the Package Manager from the Green Success Banner Message. The Banner Message will only display when the letter is generated in the Letters Chevron. For next steps from the Banner, please see pages 7 & 14 of this job aid.

# Job Aid

## CREATING PACKAGES IN VBMS CORE VIA EFOLDER

Document(s) can be added to the Package Manager from the eFolder, by selecting the applicable document(s), then selecting Package Manager from the Action drop down menu.

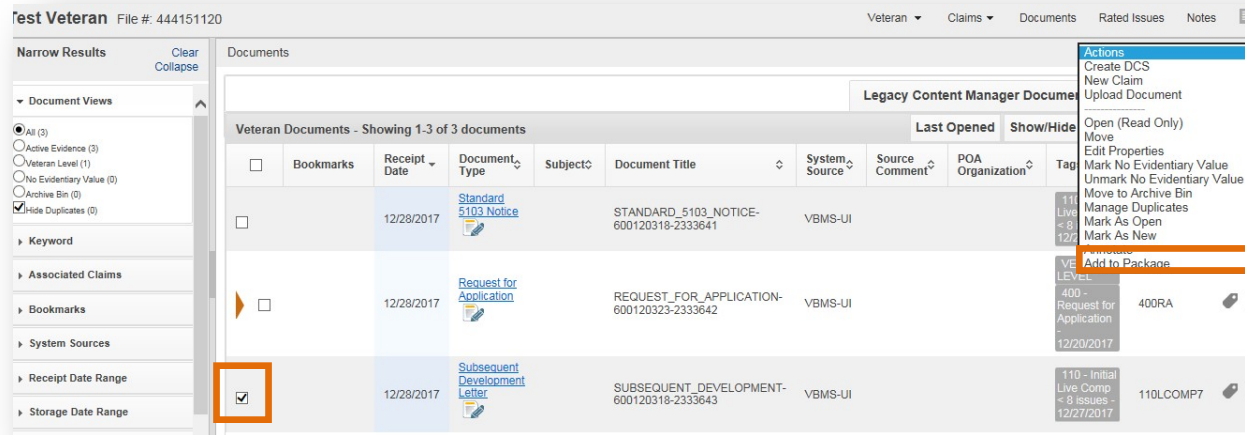


Figure 3 - The Action Down menu in the eFolder has been selected and you have the ability to select Add to Package. Note that the Subsequent Development Letter has been selected to be added to the Package

Once you make the selection to Add to Package, you will then be required to add the document(s) to a new package or add the document(s) to an Existing Package.



NOTE: Letters created using PC Generated Letters (i.e. PCGL, letter creator and/or SOC) would be sent after the letter has been uploaded to the eFolder

# Job Aid

- New Package created from the eFolder will contain a group of documents, indicated in a particular order, and the associated distribution information (could have more than one distribution in a package depending on the number of identified recipients) that has not been previously sent to Centralized Printing.
- An existing package – has been previously started either through letter finalization or from the eFolder but has not yet been sent to centralized printing



NOTE: When adding the document(s) to a new package, you must input a Package Name. An example of a Package Name could be, “FOIA Request – 12/28/2017”.

**Add to Package**

Add Document(s) to New Package  
Package Name:

Add Document(s) to Existing Package  
Select Existing Package:  
Standard 5103 Notice - 12-28-2017  
Subsequent Development Letter - 12-28-2017

Figure 4 - The Add to Package screen in which you have the ability to add document(s) to a new package or add document(s) to an existing package and then: return to the eFolder, go to package manager, or cancel.

# Job Aid

## ACCESSING THE PACKAGE MANAGER

The Package Manager can be accessed from the Veteran drop down menu.

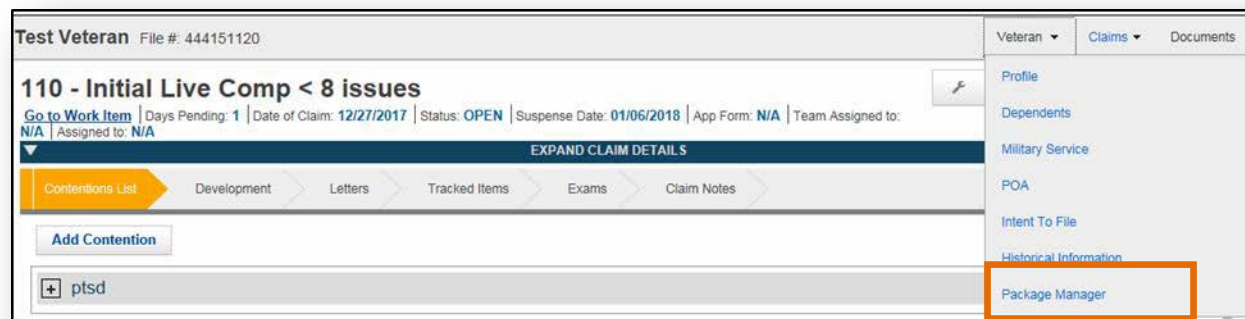


Figure 5 – Package Manager option in Veteran drop down menu



# Job Aid

## CREATING OR DELETING A PACKAGE (PACKAGE MANAGER)

1. If a package has not yet been created, and a package is needed, you have the ability to create a new package from the Package Manager Screen. Once a package is created, the package will be in a “New” status.
2. If a package is no longer needed, you have the ability under the Distributions tab to delete packages in “New” status by selecting Delete (trashcan icon).

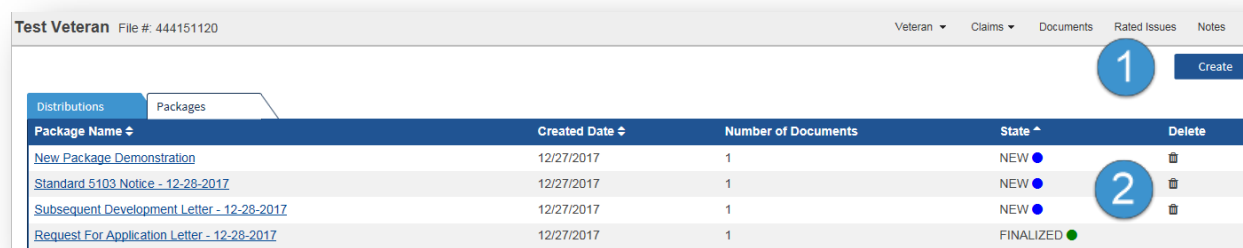


Figure 6 – The Create button (1) and the Delete button (2) on the Package Manager screen

# Job Aid

## ADDING DOCUMENTS TO A PACKAGE (PACKAGE MANAGER)

Within a new package, you have the ability to add additional document(s). Any document within the eFolder or any Standard Enclosure can be added.

To add document(s) to a package, select +Document(s).

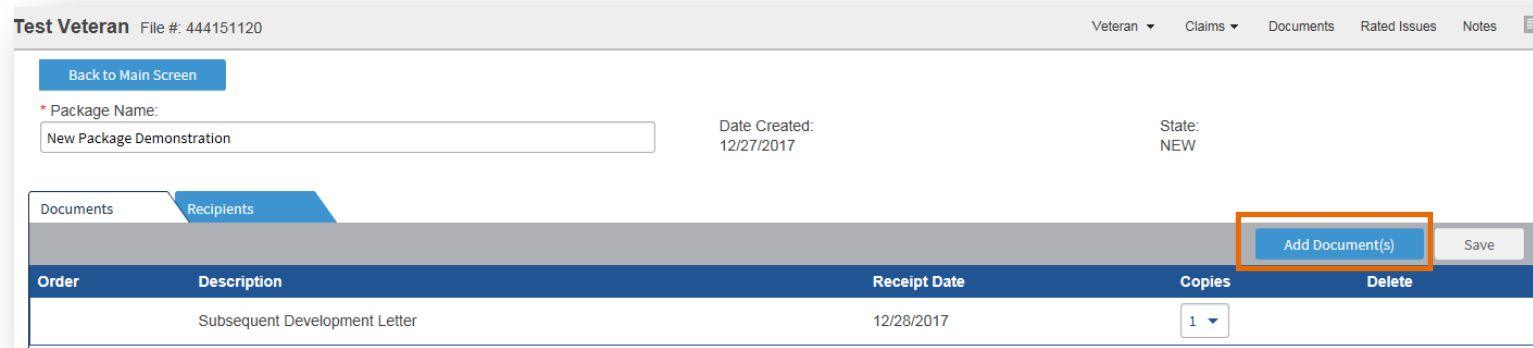


Figure 7 – Add Document(s) button in the Package Manager



# Job Aid

To add eFolder document(s), select the document(s) you wish to add

Document Name	Date
Request for Application	12/28/2017
Standard 5103 Notice	12/28/2017
Subsequent Development Letter	12/28/2017

Figure 8 – Add Documents to Package window

# Job Aid

Select the icon to move the document(s) to the box on the right hand portion of the screen, and select Add Document(s).

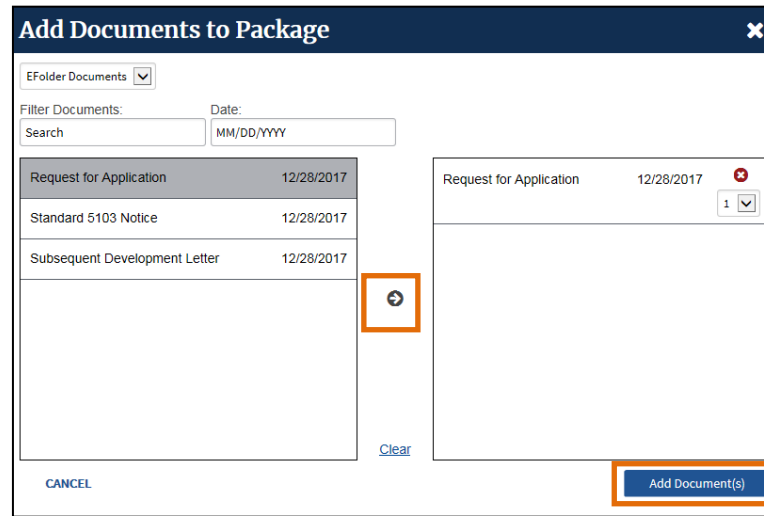


Figure 9 – Select and Add Documents



NOTE: Once the document(s) have been moved to the right hand portion of the screen, you have the ability to edit the number of copies.

# Job Aid

## ADDING STANDARD ENCLOSURES

To add standard enclosures to the package, select Standard Enclosures from the drop down menu.

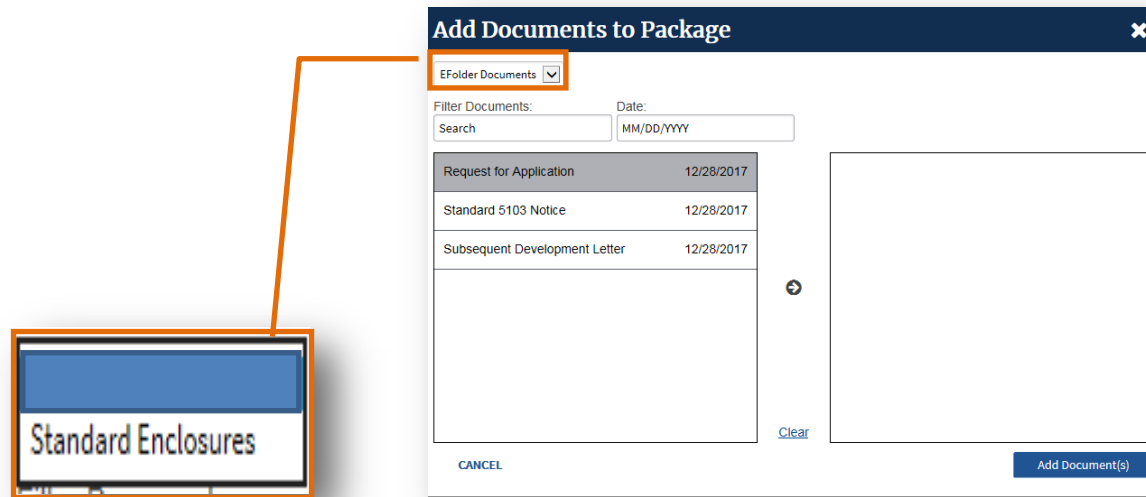


Figure 10 – Adding Standard Enclosures

# Job Aid

Select the standard enclosure you wish to add.

**Add Documents to Package** [X]

Standard Enclosures [v]

Filter Documents:  
Search [ ]

- 38 U.S.C. 5103 Notice Response
- 38CFR 3.12
- Appeals Management Center Coversheet
- Appeals Satisfaction Notice
- Claim Exam Enclosure**
- DD Form 149
- DD Form 2168
- Detailed Guide: GW UNDIAGNOSED ILLNESS
- Milwaukee RACC Coversheet
- NA Form 13055
- NA Form 13075

[Clear]

[Add Document(s)]

Figure 11 – Select Standard Enclosure

# Job Aid

Select the icon to move the standard enclosure(s) to the box on the right hand portion of the screen, and select Add Document(s).

After all documents have been added to the package, hit the save button and navigate to the recipients tab to continue processing the package (as shown in figure 7 on page 8).

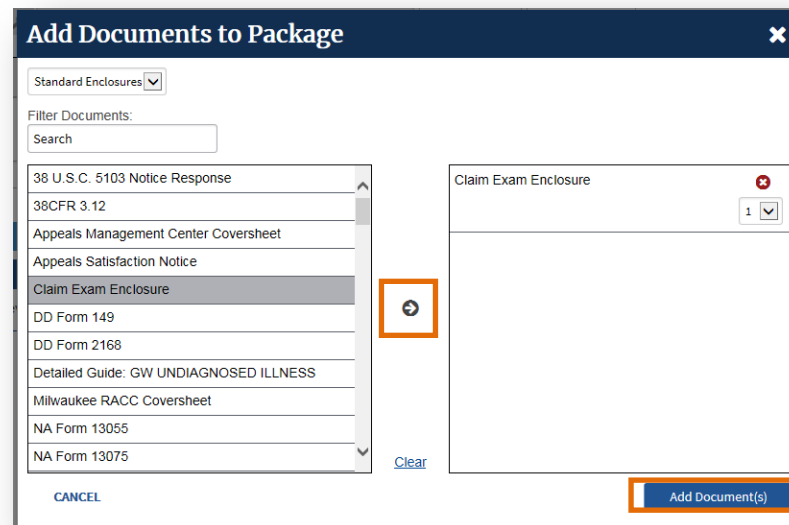



Figure 12 – Select and add enclosure(s)

# Job Aid


## ADDING RECIPIENTS TO A PACKAGE

If the package was created through VBMS Core letter finalization ([and a green banner was displayed as shown on page 3](#)), the recipient information will be imported from what was previously entered.

 **NOTE:** If the package was created through the Letter Interview, you will need to only confirm that the recipient information is correct, and select Send Package for EACH RECIPIENT.

Within a new package, you have the ability to add recipient(s). Recipient(s) can either be an individual or organization. To add a recipient:

1. Select **Recipient** to open the package Recipient tab.
2. Click **Individual** or **Organization**.
3. Input all necessary information as indicated by an asterisk.
4. Select **Save**.
5. Select **Send Package** for EACH RECIPIENT.

 **NOTE:** Once the package is submitted to CBCM for package, you are expected to see the package's status from "New" to "Finalized" in the "Distributions" tab.

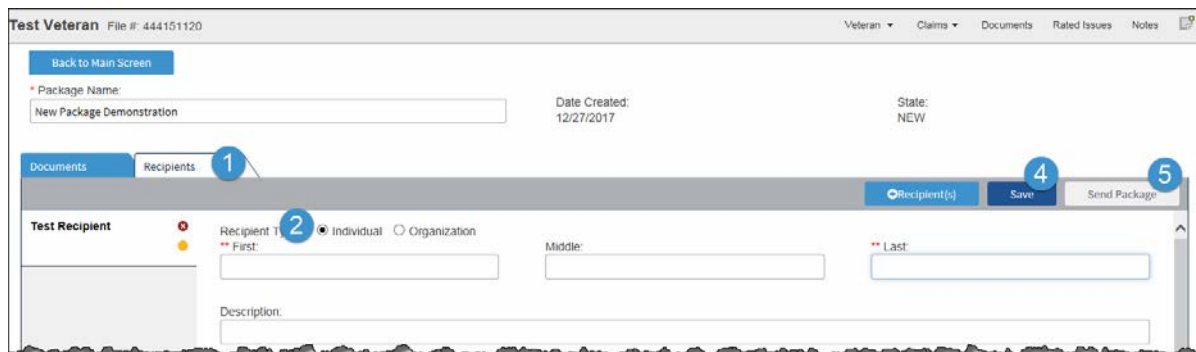



Figure 13 – Adding recipients

 **NOTE:** For printing ADL letters, please see CBCM Awards Job aid.

*This job aid contains fictitious Veteran information on various images for training purposes*



# Job Aid

## SOJ MAILING ADDRESS REFERENCE

If a claimant has a County or National Veteran Service Organization (VSO) as their representative, no address will be auto-populated. Instead, users will have to manually enter the claimant's station of jurisdiction (SOJ) address so the VSO letter copy can be locally disseminated. Please use the accompanying list titled, "SOJ Address List for VSOs\_CBCM" as a reference of SOJ address.



**NOTE:** If an address is highlighted in red on the "SOJ Address List for VSOs\_CBCM" spreadsheet, VBMS will still prompt users to validate the address. Users will see a message indicating a "missing apt/suite number." Be sure to use the address entered from spread sheet, as these addresses have been validated.

**Address Suggestion**

The address you entered may be invalid:

**Street Address:** Attn: Mailroom Suite 601  
130 S. Elmwood Avenue

**City:** Buffalo  
**State:** NY  
**Zip Code:** 14202

Address Suggestion(s):

**Warning: Missing Apt/Suite Number**

**Street Address:** 130 S ELMWOOD AVE  
**City:** BUFFALO  
**State:** NY  
**Zip Code:** 14202

Submit Selected Edit Selected Cancel Selected

\*\* Name Line 1:  USE RECIPIENT NAME FROM ABOVE \*\* City: Buffalo

DVA Buffalo Regional Office

Figure 14 – Address Suggestion