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|  | **VBMS-Fiduciary** **Centralized Benefits Communications Management (CBCM)** |
| **INSTRUCTIONS for using CBCM to send out correspondence and notification** |
| **PURPOSE**: To provide the fiduciary hub employees with high-level steps on how to send out correspondence and notification letters using CBCM**DISCLAIMER**: All Claim ID#s, File #s, and names are fictitious and for use only in the VBMS Fiduciary training environment. | **WARNING**: This is not a formal document and is for Internal Use Only. |

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| Create a package via the eFolder | * Select the applicable document(s) using the boxes for each desired document
* Then select **Add to Package** from the **Action** drop down menu

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| Create a package via the eFolder | * Then choose to add the document(s) to a new or existing package
* if a new package is created, a package name is required (i.e. Due Process Notification 11-3-20)
* If either **Add & Return to eFolder** or **Add & Go to Package Manager** is selected, the user will have the option of adding additional documents to the package.

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| Creating Packages in Package Manager | * Create a new or existing package by clicking on the **Package Manager from the Veteran’s** drop-down menu

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| Creating Packages in Package Manager | * If the package was automatically created and inserted into Package Manager by VBMS-Fid, the complete package will be on the **Packages** tab.
* From this tab, the user will be able to select the correct package to review the documents and add recipients

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| Creating Packages in Package Manager | * To build a new package click **Create**

* The user may then select an existing package or a new package

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| Creating Packages in Package Manager  | * For new packages, the user will have to name the package and select **Add Document(s)**

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| Creating Packages in Package Manager | * The available drop down allows the user to choose from documents in the beneficiary’s eFolder or Standard enclosures
* Once the appropriate documents have been selected and moved to the box on the right, select **Add Documents**

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| Creating Packages in Package Manager | * After the documents are added, click **Save**
* Continue to the **Recipients** tab (this will be grayed out until the package is saved)

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| Addressing Correspondence | * On the Recipients tab, the user can address the package to the desired recipients.
* Select **Add Recipient** to add a new option for a recipient
* If the Veteran is the recipient, select the **Veteran is recipient** option
* If the Veteran is NOT the recipient, complete the name and address boxes
* Select **Add Recipient** to add another option for a recipient
* If the correspondence needs to be sent to the beneficiary’s POA, select **Organization** as the recipient type
* Copies of letters for VSOs will be mailed to the SOJ

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| Addressing Correspondence | * Once the recipients and addresses are entered, select **Send Package** for each recipient
* A draft status is indicated by a yellow circle by the recipients' name
* Draft status that has been successfully sent to CBCM is indicated by a yellow envelope

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| Main Screen | * The Main Screen has a **Distributions** and **Packages** tab
* Distributions tab will display all correspondence and the recipients
* Packages tab will only display the individual package

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| Main Screen | * The Distributions tab indicates the status of the packages created
* Draft – package created but not sent
* In Progress- package created and sent to CBCM for processing
* Success- package processed by CBCM

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| Deleting a Package Created in Error | * Select the **Packages** tab on the Main Screen
* Select the trash can icon and indicate the package should be deleted when prompted
* **Note-** Once a package has been sent to CBCM, the user is unable to delete the package

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