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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 |
| 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. |
| Creating Packages in Package Manager | * Create a new or existing package by clicking on the **Package Manager from the Veteran’s** drop-down menu |
| 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 |
| Creating Packages in Package Manager | * To build a new package click **Create**      * The user may then select an existing package or a new package |
| Creating Packages in Package Manager | * For new packages, the user will have to name the package and select **Add Document(s)** |
| 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** |
| 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) |
| 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 |
| 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 |
| 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 |
| 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 |
| 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 |