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

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CURRENT FUNCTIONALITY REMINDER
INSTERTING 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.

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

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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.

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.*

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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.
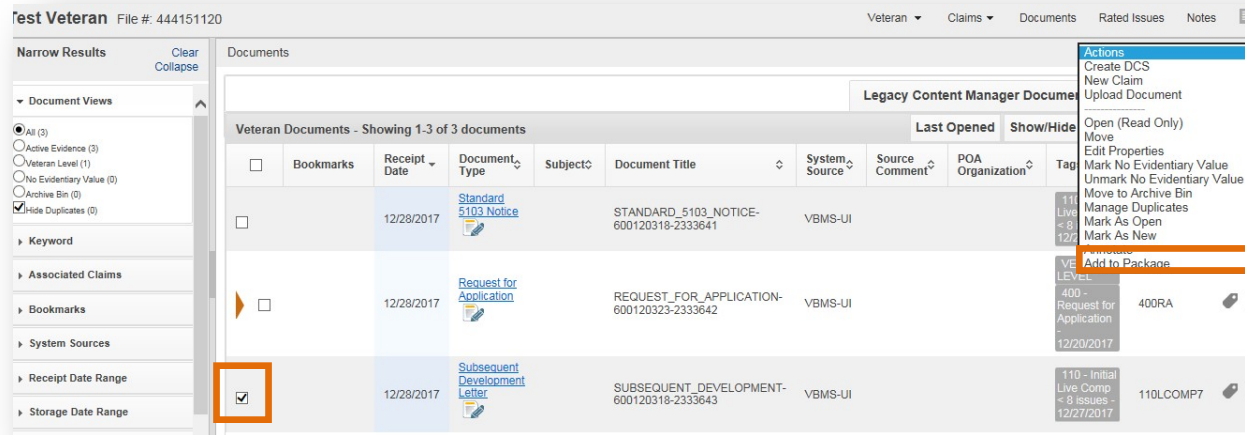

Figure 3 - The Action Down menu in the eFolder has been selected and you have the ability to select Add to Package. Note that the Subsequent Development Letter has been selected to be added to the Package

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

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☐ <u>New Package</u> 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.

• <u>An existing package</u> – 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".

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.

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ACCESSING THE PACKAGE MANAGER

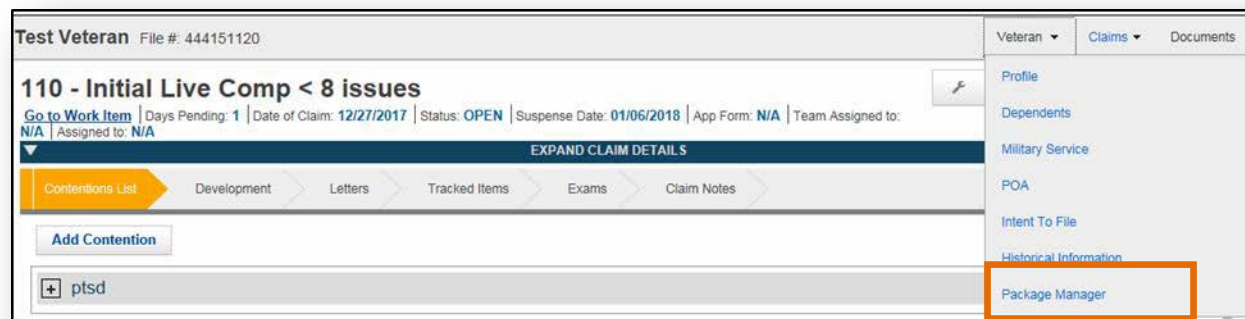The Package Manager can be accessed from the Veteran drop down menu.

Figure 5 – Package Manager option in Veteran drop down menu

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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).
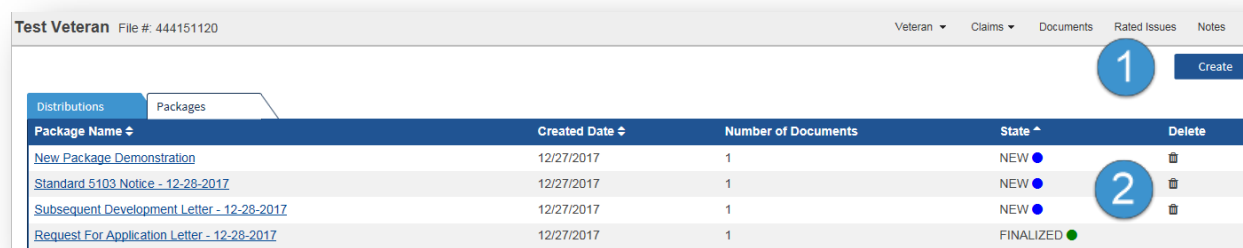

Figure 6 – The Create button (1) and the Delete button (2) on the Package Manager screen

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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.

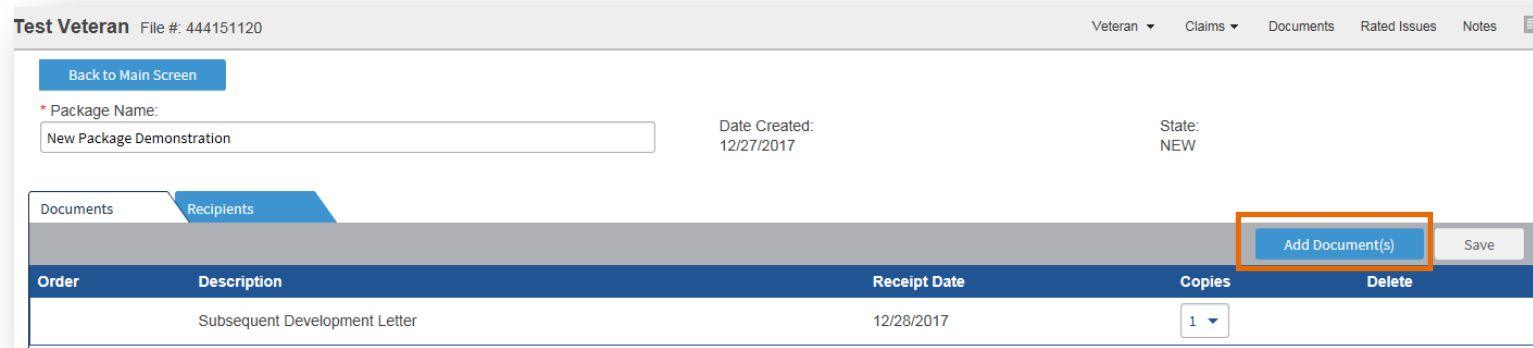To add document(s) to a package, select +Document(s).

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

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

Figure 8 – Add Documents to Package window

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

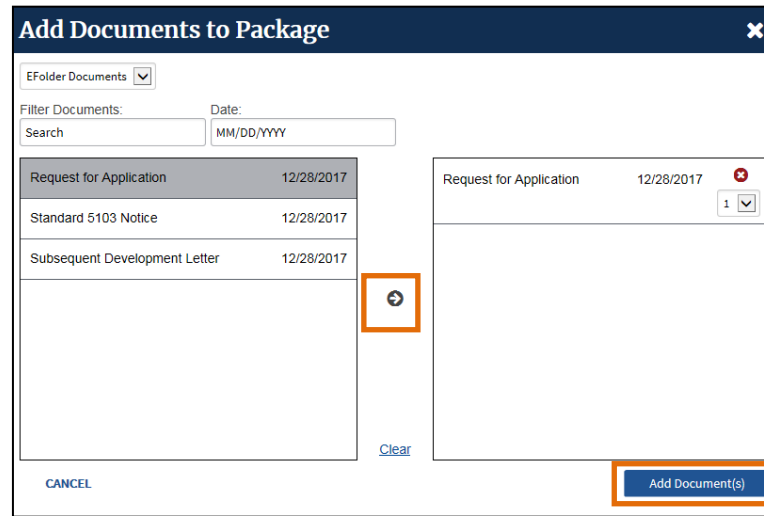*Figure 9 – Select and Add Documents*

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.

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ADDING STANDARD ENCLOSURES

To add standard enclosures to the package, select Standard Enclosures from the drop down menu.
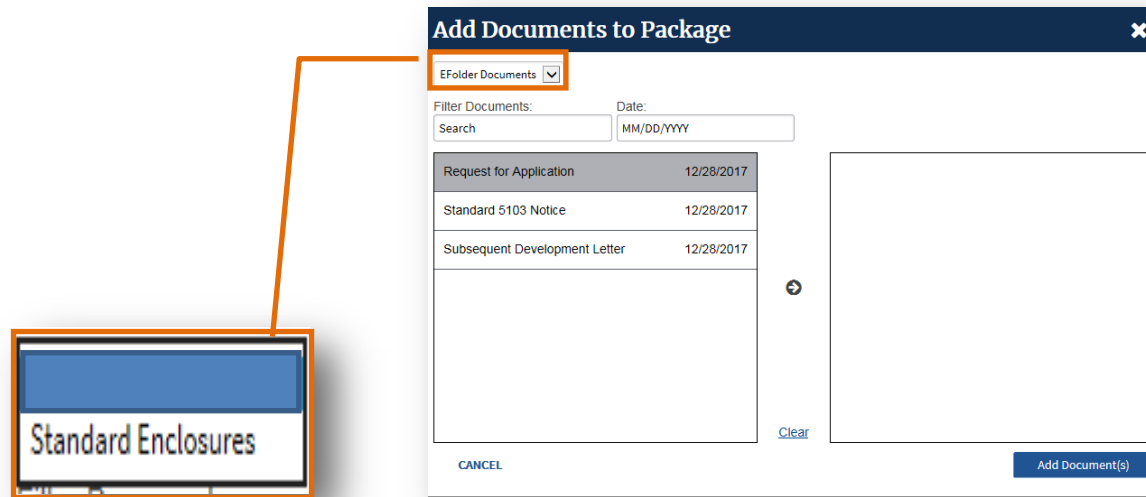
Figure 10 – Adding Standard Enclosures

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Select the standard enclosure you wish to add.

Figure 11 – Select Standard Enclosure

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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).
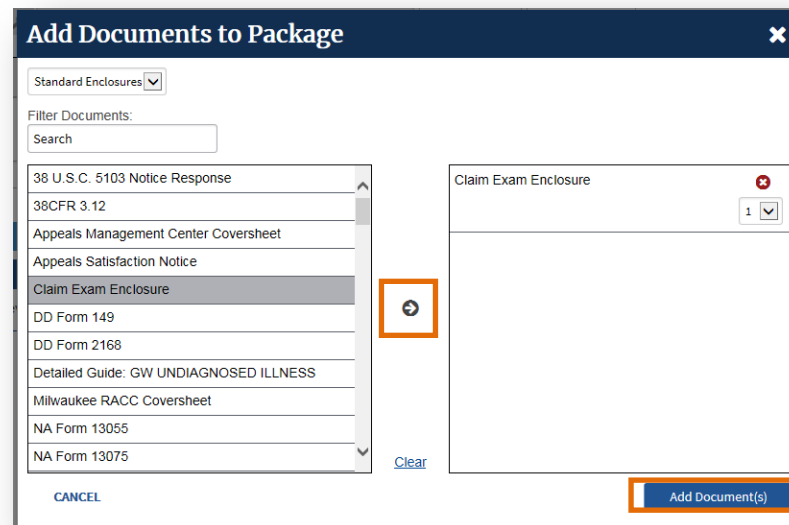

Figure 12 – Select and add enclosure(s)

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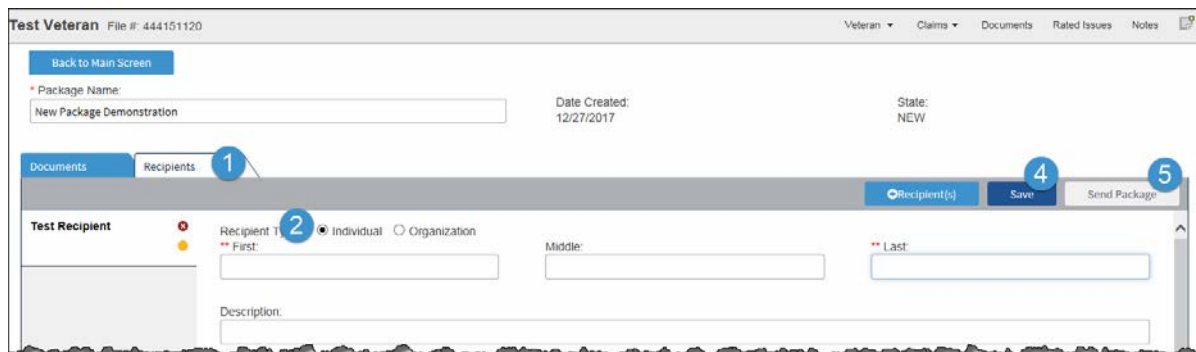
💡 NOTE: For printing ADL letters, please see CBCM Awards Job aid.

Figure 13 – Adding recipients

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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.

Figure 14 – Address Suggestion

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