Centralized Benefits Communications Management (CBCM) Phase One – Centralized Printing

Instructor Lesson Plan

Time Required: 2 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 # | 4562424 |
| Prerequisites | Prior to this lesson, the VSR, RVSR, AQRS, RQRS, CA, PCT VSR, and Pre-Discharge MSC should have completed the applicable Challenge Program.  |
| target audience | The target audience for AQRS, CA, PCT VSR, Pre-Discharge MSC, RQRS, RVSR- Entry level through Journey Level, VSR- Entry Level through Journey Level.Although this lesson is targeted to employees indicated above, it may be taught to other VA personnel as mandatory or refresher type training. |
| Time Required | 2 hrs. |
| Materials/TRAINING AIDS | Lesson materials:* Centralized Benefits Communications Management (CBCM) -PowerPoint Presentation
* Centralized Benefits Communications Management (CBCM) - Lesson Plan
* Centralized Benefits Communications Management (CBCM) - Trainee Handouts

Job Aids:* [Awards Job Aid](https://vba-media1.vbatraining.org/VBA_Learning_Catalog/Comp_Svc/Add_Ref/4415957_Add_Ref%283%29.pdf)
* [[CBCM August Update](https://vba-media1.vbatraining.org/VBA_Learning_Catalog/Comp_Svc/Add_Ref/4415957_Add_Ref%288%29.pdf)](https://vba-media1.vbatraining.org/VBA_Learning_Catalog/Comp_Svc/Add_Ref/4415957_Add_Ref%287%29.docx)
* [CBCM Glossary Quick Reference](https://vba-media1.vbatraining.org/VBA_Learning_Catalog/Comp_Svc/Add_Ref/4415957_Add_Ref%284%29.pdf)
* [CBCM Job Status Quick Reference](https://vba-media1.vbatraining.org/VBA_Learning_Catalog/Comp_Svc/Add_Ref/4415957_Add_Ref%285%29.pdf)
* [Centralized Printing FAQ](https://vba-media1.vbatraining.org/VBA_Learning_Catalog/Comp_Svc/Add_Ref/4415957_Add_Ref%281%29.pdf)
* [Core Job Aid](https://vba-media1.vbatraining.org/VBA_Learning_Catalog/Comp_Svc/Add_Ref/4415957_Add_Ref%282%29.pdf)

* [Preparing Files for Centralized Printing (QA July 2020 Call)](https://www.linkedin.com/learning/me?u=70115025)
* [[Tips for Using Centralized Printing Successfully](https://vba-media1.vbatraining.org/VBA_Learning_Catalog/Comp_Svc/Add_Ref/4415957_Add_Ref%287%29.docx%22%20%5Ct%20%22_blank)](https://vba-media1.vbatraining.org/VBA_Learning_Catalog/Comp_Svc/Add_Ref/4415957_Add_Ref%289%29.pdf)

* [VSO Addresses](https://vba-media1.vbatraining.org/VBA_Learning_Catalog/Comp_Svc/Add_Ref/4415957_Add_Ref%286%29.xlsx%22%20%5Ct%20%22_blank)
 |
| Training Area/Tools  | The following are required to ensure the trainees can 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
* Compensation Service Internet Website
* VBMS-Core
* VBMS-Awards (A)

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|  | * 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.
 |
| Pre-Planning  | * 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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| 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 Centralized Benefits Communications Management (CBCM) Phase One – Centralized Printing |
| 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 Lesson Explain the following: | This lesson is intended to provide an overview of Centralized Benefits Communication Management (CBCM) and explain the functionality of the August update in Veterans Benefit Management System (VBMS)-Awards program. Explain how CBCM is streamlining the delivery of outbound communications across all VBA business lines and describe the process for creating a package in VBMS Core and VBMS Awards. This lesson will contain discussions and exercises that will provide the user(s) a better understanding of: * CBCM benefits to Veteran’s, claims processors, and common terms used related to package creation.
* Creating and deleting packages in VBMS-Core and VBMS -Awards.
* Identify package status’s and actions needed to move the package forward.
* Explain the VSO co-location functionality added to VBMS-Awards program.
 |
| MotivationSlide 2 | Centralized Benefits Communication Management (CBCM) allows claims processors the ability to submit letters electronically to one central location for printing and distribution, allowing claims processors more time to focus on assessing Veterans compensation claims. And reduces the risk of Personal Identifiable Information (PII) violations. |
| Lesson ObjectivesDiscuss the following:Slide 2 Handout 2 | In order to accomplish the purpose of this lesson, all VSR, RVSR, AQRS, RQRS, CA, PCT VSR, and Pre-Discharge MSC will be required to accomplish the following lesson objectives.* Explain what CBCM is and the August 2018 update in the Veterans Business Management System – Awards (VBMS-A) program.
* Demonstrate how to create a Package in VBMS-Core and VBMS-A.
* Recognize the Package status in VBMS-Core.
* Identify the actions required of each status: Draft, In Progress, Success, and Failure.
 |
| Explain the following: | Each learning objective is covered in the associated topic. At the conclusion of the lesson, the learning objectives will be reviewed.  |
| STAR Error code(s) | Task 10 |
| ReferencesSlide 3 Handout 3 | Explain where these references are located in the workplace.* [M21-1 1.1.B – Duty to Notify Under 38 U.S.C. 5102 and 5103](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=duty%20to%20notify)
* [M21-1 1.3.B – A Representative’s Right to Notification and Review of Records](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)
* [M21-1 III.ii.1.B – Mail Management](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=centralized%20printing)
* [M21-1 III.ii.1.B – Evidence Requested from the Claimant](https://vaww.vrm.km.va.gov/system/templates/selfservice/va_kanew/help/agent/locale/en-US/portal/554400000001034/content/554400000014152/M21-1-Part-III-Subpart-iii-Chapter-1-Section-B-Evidence-Requested-From-the-Claimant)
* [M21-1 III.v.2.B – Decision Notices](https://vaww.vrm.km.va.gov/system/templates/selfservice/va_kanew/help/agent/locale/en-US/portal/554400000001034/content/554400000014231/M21-1-Part-III-Subpart-v-Chapter-2-Section-B-Decision-Notices?query=decision%20notices)
* [Awards Job Aid](https://vba-media1.vbatraining.org/VBA_Learning_Catalog/Comp_Svc/Add_Ref/4415957_Add_Ref%283%29.pdf)
* [CBCM August Update](https://vba-media1.vbatraining.org/VBA_Learning_Catalog/Comp_Svc/Add_Ref/4415957_Add_Ref%288%29.pdf)
* [CBCM Glossary Quick Reference](https://vba-media1.vbatraining.org/VBA_Learning_Catalog/Comp_Svc/Add_Ref/4415957_Add_Ref%284%29.pdf)
* [CBCM Job Status Quick Reference](https://vba-media1.vbatraining.org/VBA_Learning_Catalog/Comp_Svc/Add_Ref/4415957_Add_Ref%285%29.pdf)
* [Centralized Printing FAQ](https://vba-media1.vbatraining.org/VBA_Learning_Catalog/Comp_Svc/Add_Ref/4415957_Add_Ref%281%29.pdf)
* [Core Job Aid](https://vba-media1.vbatraining.org/VBA_Learning_Catalog/Comp_Svc/Add_Ref/4415957_Add_Ref%282%29.pdf)
* [Preparing Files for Centralized Printing (QA July 2020 Call)](https://www.linkedin.com/learning/me?u=70115025)
* [Tips for Using Centralized Printing Successfully](https://vba-media1.vbatraining.org/VBA_Learning_Catalog/Comp_Svc/Add_Ref/4415957_Add_Ref%289%29.pdf)
* [VSO Addresses](https://vba-media1.vbatraining.org/VBA_Learning_Catalog/Comp_Svc/Add_Ref/4415957_Add_Ref%286%29.xlsx)
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| Topic 1: Purpose and Benefits of Centralized Benefits Communications Management (CBCM) Phase One Centralized Printing |
| Introduction | This topic explains the purpose, benefits and frequently used terminology of CBCM.  |
| Time Required | 0.25 hours |
| OBJECTIVES/Teaching Points | Topic objectives:* Explain the new CBCM update in the Veterans Business Management System – Awards (VBMS-A) program.
* Review Federal Tax Information (FTI)
* Identify frequently used terminology of CBCM.

The following topic teaching points support the topic objectives: * Benefit of CBCM.
* Federal Tax Information (FTI)
* Frequently used terminology of CBCM.
 |
| Topic 1: Purpose and Benefits of CBCM Phase One – Centralized Printing (cont.)Slide 6-7Handout 4 | Centralized Benefits Communications Management (CBCM) is a Veterans Benefits Administration (VBA) initiative designed to provide greater choice for claimants and beneficiaries in how they receive correspondence from VBA. VBMS is the primary connection to CBCM, through CBCM-Package Manager letters are electronically submitted to one central location for printing and distribution. This functionality already active in VBMS-Core.In the August 2018 VBMS-A installed update, VBMS-A interface mirrors the VBMS-Core Package Manager interface for Veteran Service Officers at co-located Regional Offices. Automating the way, we notify our Veterans and their beneficiaries provides a faster more efficient means of notification. And will allow the Veteran Service Representative’s (VSR) more time to process claims. And reduces the risk of Personal Identifiable Information (PII) violations.  |
| Topic 1: Purpose and Benefits of CBCM Phase One – Centralized Printing (cont.)Slide 8Handout 5 | Commonly Used TerminologyPlease review the CBCM Glossary Job Aid attached to this lesson. Review with the audience common terms used in CBCM. |
| Topic 1: Purpose and Benefits of CBCM Phase One – Centralized Printing (cont.)Slide 9Handout 5 | **Federal Tax Information (FTI)**If the employee discovers FTI in VBMS follow the guidance in: [*X.4.B.2.d.  Removing an FTI Document Within VBMS and Securely Storing Within LCM.*](https://vaww.vrm.km.va.gov/system/templates/selfservice/va_kanew/help/agent/locale/en-US/portal/554400000001034/content/554400000143603/M21-1-Part-X-Chapter-04-Section-B-Federal-Tax-Information-FTI-Match-Safeguarding?query=federal%20tax%20information%20fti)  |
| Knowledge CheckSlide 10 | **1:** What does CBCM stand for?**A:** *Centralized Benefits Communication Management (CBCM)***2**. The functionality of sending correspondence(s) through CBMC- Centralized Printing is through which two VBA systems? A: *VBMS-Core and VBMS-Awards.* |
| Topic 2: Creating a Package in VBMS-Core |
| Introduction | This topic instructs on how to navigate to Package Manager through VBMS-Core from the letter chevron in the Claims Detail page and from the Veteran’s eFolder. The lesson also covers creating and deleting a package(s) in Package Manager, identifying the status of a package and what action(s) if any need to be taken in Package Manager to move the package forward.  |
| Time Required | 0.5 hours |
| OBJECTIVES/Teaching Points | Topic objectives:* Demonstrate how to create and delete a package in Package Manager
* Recognize the status of a package and identify the actions required of each status; draft, in progress, success and failure.

The following topic teaching points support the topic objectives: * Create a package via Letter Finalization
* Create a package via the Veteran’s e Folder
* Create a package in Package Manager
* Identify the status of a package in Package Manager
 |
| **Topic 2: Creating a Package in VBMS-Core**Slide 12Handout 6 | Creating a package:1. Via the Letter Finalization screen when a letter is finalized and
2. Manually, in Package Manager under the “Veteran” tab

The following slides will describe to the audience how to create a package in VBMS-Core.  |
| *Creating a package via Letter Finalization*Slide 14-15Handout 6-7**Creating a package in Package Manager** Slide 17-25Handout 7-12 | **Creating a package via Letter Finalization**When a letter is finalized in VBMS-Core, VBMS will automatically create a package in package manager. Finalized letters are automatically saved as a draft package. In VBMS-Core, under the Letter Chevron when a letter is finalized a green “success” banner appears. In this green banner is a link to Package Manager. Click “here” to be automatically directed to Package Manager and complete the process of creating a package. *Slide 15*In Package Manager, under Distributions tab chose the correct package for the Veteran. Packages are alphabetical by recipient’s name and date of letter. The status for the newly created package should reflect “Draft” with a yellow dot Finalizing the packet will be discussed later in the presentation. **Creating a Package in Package Manager** A package can be created from the Veteran’s eFolder by choosing the Veteran’s tab in VBMS-Core, opening the drop-down menu and selecting Package Manager. *Slide 18*Once the user selects Package Manager VBMS automatically directs to the main page of Package Manager. The view on the main page defaults to the “Distributions” tab.The main screen in Package Manager defaults to “Distributions” tab. From this screen the user will choose the “Create” tab in the upper right side of the screen. *Slide 19*The Create dialog box will appear, user will choose “New Package” then Create.*Slide 20*Users will name the package based on the request being made (i.e. Due Process Notification) and the correspondence date (i.e. Due Process Notification – 12/31/17Note: all (\*) asterisks need to be completed. *Slide 21*Follow slide progression – read slide*Slide 22*Most of the letters/packages created will require standard enclosures. From the eFolder’s documents drop down chose “Standard Enclosures”, a list of standard enclosure will populate in the left had column. Chose the appropriate forms, use the arrow to move the forms to the column on the right. Click “Add Document(s)” to move the documents to the package.\*Instructors inform the audience that letters created in either the Personal Computer Generated Letter (PCGL) or Letter Creator program will be sent after the letter has been uploaded to the eFolder.*Slide 23*Next, chose the “Recipients” tab. User will choose the appropriate recipients, either an individual or an organization. If the user selects “Veteran is Recipient” the Veteran’s information will populate the screen.*Slide 24*When “Organization” is chosen, the user can select the Co-located Organization option. Choosing this option will prompt the system for POA designations. Use the drop down menu under the National/State/Regional Organization and select the appropriate POA.Selecting the POA will automatically generate the address co-located to the RO of jurisdiction. *Slide 25*Click on “Send Package” when all information has been added. The package status will reflect as “Draft” indicated by a yellow dot Verify the package was sent to Centralized Printing when the circle changes to a yellow envelope and the status changes to FINALIZED. |
| nowledge CheckSlide 26 | 1: Name two areas in VBMS-Core where you can navigate to package manager. A: 1. Letter finalization screen, letter tab in VBMS-Core 2. from the Veteran’s eFolder2: What box do you check when creating a package to automatically populate the Veteran’s name and address? A: Veteran is Recipient |
| Topic 3: Identifying the Status of a Package  |
| Introduction | This topic instructs on the status of a package, the user will identify the status of a package and recognize if any actions are needed to move the package forward.  |
| Time Required | 0.25 hours |
| OBJECTIVES/Teaching Points | Topic objectives:* Identify the two (2) tabs in Package Manager where the package status is displayed.
* Explain the action required for each status of a package.
* Describe how to delete a package folder from Package Manager.

The following topic teaching points support the topic objectives: * Package Manager navigation
* Define the status of a package
* Deleting a package in Package Manager
 |
| Topic 3: Identifying the Status of a PackageSlide 28-30Handout 12-13 | From the Package Tab in VBMS-Core, Package Manager screen the user is able to view all packages and the package status under the “Distributions” tab or the “Recipients” tab.Click on the “Distributions” tab the users will see one of four (4) package status’s:1. Draft with a yellow circle C:\Users\acddhara\AppData\Local\Microsoft\Windows\INetCache\Content.MSO\1376F563.tmp means the package has not been finalized and sent. The user must finalize package for the package to be sent.
2. In Process with a yellow envelope in indicates the package has been finalized and is being processed by Centralized Printing. The user does not need to take any further action.
3. Success with a green checkmark My Little Pony Friendship is Magic indicates that Centralized Priming has received and accepted the package. No user action is needed.
4. Fail with a red exclamation mark package can also be created from the Veteran tab in VBMS-Core. This means Centralized Printing received the package but was unable to print it. User should contact VAVBAWAS/CO/VCIP

The “Distributions” tab displays packages related to the recipient, the recipients are in order or name and date of package. Status’s of packages under the “Distributions” tab provides information of package status and whether the package was received by Centralized Printing. *Slide 30*Similar information is found under the “Recipient” tab. Under the “Recipients” tab the information is sorted by package name and creation date. There are two (2) statuses under this tab.1. A blue circle circle icon indicates that package has not been finalized. The user needs to finalize and send the package.
2. A green circle How To Set Use Small Green Dot Icon Png - Transparent Background ... indicates the package has been sent to Central Printing. No further action is needed.

**Deleting a Package** trash 2 iconUnder the “Recipients” tab the user can delete packages no longer needed by clicking on the trash can icon. |
|  |  |
| Knowledge CheckSlide 31 | 1. Under the “Distributions” tab what are the 4 status’s a user may see?

A: Draft, In Progress, Success and Fail1. Under the “Packages” tab what would a user click to delete a new package?

A:The trash icon  |
| Topic 4: Creating Packages in VBMS-A |
| Introduction | This topic instructs on how to create a package in VBMS-A and describes the August 2018 update of the VSO collocation functionality in VBMS-A. |
| Time Required | 0.25 hours |
| OBJECTIVES/Teaching Points | Topic objectives:* Explain at which point in the awards generation process a user would create a package.
* Identify which tab is used to include enclosures to the packet.
* Describe what two (2) messages the authorizer receives when the award is finalized.
* Identify the status of a package sent from VBMS-Awards.

The following topic teaching points support the topic objectives: * Creating packages in VBMS-A
* Verifying package status in VBMS-A
 |
| Topic 4: Creating a Package in VBMS-AwardsSlide 33-39Handout 14-16Handout 17-18 | CBCM recently updated the VBMS-Awards interface which mirrors the VBMS- Core Package Manager interface for Veteran Service Officers at co-located Regional Offices. Prior to the VBMS update users were required to enter an address for National, State and Local VSO’s in VBMS-Awards for the Automated Decision Letters. CBCM implemented functionality that no longer requires entering the address of the co-located VSO’s.*Slide 33*Users can create packages in VBMS-Awards, following these steps:1. After generation of an award, navigate to the “Award Letter Interview” and select “Gen Letter”
2. Then click “Enclosures” tab.

***Note:*** Package Manager sends the documents which are indicated, users should only add documents that are not already in the Automated Decision Letter (ADL).*Slide 34*If the user needs to send additional enclosures, specify the recipients using the “Enclosure” tab. * Select “N” under “Part of Award Ltr.”, if it is not part of the normal award package.
* Select the recipient(s) using the pencil scratched pad icon.
* Enter the “Enclosed Order”. For example, if this enclosure goes first, then place a 1 in the space.

In August CBCM updated the Veteran Service Organization (VSO) collocation functionality in VBMS-Awards. The user no longer needs to add the VSO’s information. If the Veteran has a VSO associated with his/her profile the VSO information will automatically populate in package manager for VBMS-Awards.***Important***: If the “Local SOJ” is not populated, or the claimant has a private attorney, an address will still be required to be entered. The “Station of Jurisdiction” is the closest regional office based on the Veteran’s zip code. This is automatically selected and is not editable.*Slide 35-38*Instructor read through slides *35 – 38.**Slide 39*User will see one of 5 status’s and the action needed.Submitted, Submission Failed, Distribution Acknowledged, Distribution Completed and Distribution Failed. Audience should review the Centralized Printing Job Status Quick Reference for additional information. **Creating Packages in VBMS-A Authorization Review***Slide 41*Authorizers should review the addresses of recipients and to reconfirm which enclosures are going to which recipient. This information can be viewed from the “Correspondence Summary” tab from the Award Letter Interview screen. The authorizers can make adjustments/corrections in at this time by navigating to “Recipients” and/or “Enclosures” tabs.*Slide 42*Once the award is finalized the user will receive one of two (2) messages. * Success - if the package was successfully sent to Package Manager.
* Error – if the package failed to submit. The message will refer the user to the Package Manager.

It is the responsibility of the user to follow up and correct any errors received in the process of attempting to send the package to Package Manager. *Slide 43*To verify that the package was received by Package Manager and sent to Centralized Printing, the user must go to Package Manager in VBMS-Core. Search the Veteran’s name and package creation date under the “Recipients” tab. The status should show “In Progress” for successful submission.  |
| Practical Exercise |
| Time Required | 0.25 hours |
| EXERCISEHandout 19-20 | Ask if there are any questions about the information presented in the exercise, and then proceed to the Review. |
| Lesson Review and Wrap-Up |
| IntroductionDiscuss the following:  | The Centralized Benefits Communications Management (CBCM) Phase One-Centralized Printing lesson is complete.Review each lesson objective and ask the trainees if they have any questions of comment.  |
| Time Required | 0.25 hours |
| Lesson ObjectivesSlide 44 | The Centralized Benefits Communications Management (CBCM) Phase One-Centralized Printing lesson is complete.The trainee should be able to: * Explain the CBCM update in VBMA-A
* Demonstrate how to navigate to package manager through VBMS-Core and VBMS-A.
* Recognize status of a package
* Identify the actions required of each status, draft, in progress, success and failure.
 |