Letter Creator Retirement and the VBMS Letters UI

Job Aide



Revision History

Date	Version	Description	Author
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Introduction

In response to the sunset of Internet Explorer (IE) browser, all relevant Letter Creator (LC) letter functionality is being rebuilt into VBMS. The migration of these letters will occur in a phased approach over several months.¹ Most of the LC letters will be built into a new component of VBMS known as the Letters UI. This job aide will provide directions on how to access and use the Letters UI to generate letters that were traditionally available using Letter Creator.

Using Letter Creator in Edge or Chrome

As IE is phased out, Letter Creator (LC) will still be available to users through the Edge or Chrome browsers, but some of the current LC functionality will no longer be operational. This includes the LC's ability auto-populate Veteran information (name, address) onto the letter template, and the auto-establishment of a package in Package Manager. Consequently, users who continue to generate letters out of the LC application using Edge or Chrome will need to manually perform those actions. Otherwise, all the substantive letter content functionality will still be available, and there are currently no plans to decommission Letter Creator.

Letters UI: Similarities and Differences with VBMS-Core

Generating a letter in the Letters UI is generally similar to the letter functionality in VBMS-Core, but there are some differences. One key difference is when a letter is finalized in the Letters UI, a package is <u>not</u> automatically created in Package Manager. *It should be stressed that, for all letters finalized out of the Letters UI, users will be required to manually create a package out of the eFolder, otherwise the letter will not be mailed to the recipient.* Additional differences between VBMS-Core and the Letters UI are:

<u>Restrictions on Claims Contentions</u> – VBMS-Core letters are very particular to the contentions. If the contentions are not correct, certain letters are not available to users (they are grayed out). The Letters UI letters are all available no matter the contentions or lack of contentions on an EP.

<u>No development actions</u> – letters in the Letters UI are truly "standalone" and do not require the input of any development actions.

<u>Not visible in the VBMS-Core Letters Chevron</u> – Completed letters in the new Letters UI will not be visible in the Letters chevron under the claim. Users must open the Letters UI to see any pending/completed letters. Letters will be available in the Veteran's eFolder.

Work in Progress

As noted, the migration of Letter Creator letters into the VBMS Letters UI will be performed in a phased approach over several months. As such, the Letters UI will remain a work in progress as new letter functionality is added over time. This Job Aide will be updated as needed to reflect changes to the application and as additional technical capabilities are made available to users.

¹ Please see Appendix A of this Job Aide of a list of letters and their anticipated date of deployment into the Letters UI.

Letters UI

Logging in to the Letters UI

The Letters UI is available in VBMS-Core under the Letters Chevron. To access the Letters UI, users should go to the Letters Chevron and select the "Letters UI" button.

\sim							
Draft or Pending Deferral(s) are associated with this claim.							Л
110 - Initial Live Comp < 8 issues	reate (DCS Upload Document	Nev	w Claim	SSA Inquiry	Manage Evidence	
Go to Work Item Days Pending: 695 Date of Claim: 08/13/2020 Status: SRFD Suspense Date: 09/27/2020 Ready to Recall: No Team Assigned to Winston Salem Assigned to saminure * EXPAND CLAIM DETAILS	*aziz						
Contentions Development Letters Tracked Items Exams Claim Notes Deferrals Record Research Requests		X		_			
Letters			Lett	ers UI	Add New Letter	Finalize Letters	
Filter Letters: Showing 1 - 7 of 7							1Ľ
Letter	\$	Status	-	Date Sent		-	
General Records Request (Medical) fswf (Preview)		Pending				1	l
Subsequent Development Letter (Preview)		Pending					

Using the Letters UI

The Letters UI is based generally on how letters work in VBMS-Core. When users first log into the Letters UI, they will see the Home Screen. The Home Screen will contain any partially generated/pending letters and any recently finalized letters.

	VBMS Letters								
Showi	Showing 1-3 of 3								
. A	Actions Add New Letter Finalize Letters								
	Letter	Status	Date Sent	View / Edit					
	Fugitive Felon Due Process (<u>Preview</u>)	Pending		Edit					
	PA FOIA No Judge Signature - Third Party (<u>Preview</u>)	Pending		Edit					
DRO Process Explanation (Preview) Pending									
Item	Items per page: 10 C Skip to page: 1 Go								

Creating a New Letter

To create a new letter, select "Add New Letter" from the home screen:

Add New Letter Finalize Letters								
Letter	Status	Date Sent						
DRO Process Explanation (Preview)	Unknown							
Items per page: 10 C Skip to page: 1 Go								

This will take you to the Add New Letter screen, where users will be able to select from a list of letters to create. Users will select from the list of available letters, add them to the Selected Letters column, and hit Confirm.

Add New Letters			
Choose a Letter(s)		Selected Letter(s)	Copies
Annual Clothing Allowance Constraints of the Constraint of the Con		Character of Discharge Notification General Records Request - Non Medical	1
Fugitive Felon Due Process			
Fugitive Felon Final Notification			
PA FOIA Acknowledgment - Claimant	// Remove		
PA FOIA Acknowledgment - Third Party	(K Remove		
PA FOIA Final Response - Claimant			
PA FOIA Final Response - Third Party			
PA FOIA No Folder Established - Claimant			
PA FOIA No Folder Established - Third Party			
PA FOIA No Judge Signature - Claimant			
PA FOIA No Judge Signature - Third Party			
			Cancel Confirm

Editing a Letter

Once letter(s) have been selected and confirmed, users are taken to the Edit Letter screen. Users will be given the opportunity to edit the letters using functionality similar to VBMS-Core letters. Users will be required to enter in the same required fields and various optional fields, as well as adding attachments, etc., depending on the letter. One new feature is the Screen Navigational Links on the left side of the screen that provide the ability to navigate to the different sections of the letter with a single click.

tter 1 of 2: Character of	Discharge Notification
haracter of Discharge lotification	General
General	Title (*Required) Preferred Name (*Required) Soloct 1
Custom Fields	Refer To (*Required)
Standard & eFolder Enclosures	373/MG
Free Text	Custom Fields EOD (*Required) Month Day Year RAD (*Required) Month Day Year
	Additional period of honorable service exists

Letter Preview, Save, Delete Options

The preview, delete, and save options are located at the bottom of the Edit Letter screen.

Once all the necessary inputs have been made, users can select "Preview" to preview the letter. Upon selecting "Preview" in the Edit Letter screen, the letter will pop up in a different tab, like how it works in VBMS-Core:

¥
Preview Delete
K Back Save and Continue >>
↑ Back to Top

Once a letter has been previewed, users can complete further edits to the letter, select "Save and Continue" to return to the home screen, or delete the letter.

Selecting "Save and Continue" will take you back to the next letter if you have selected multiple letters or to the Home Screen where users can select to Finalize the letter.

Showing 1-3 of 3								
Actions Add New Letter Finalize Letters								
	Letter	Status	Date Sent	View / Edit				
	DRO Process Explanation	Finalized	2022-07-11	View				
	Earlier Effective Date (<u>Preview</u>)	Pending		Edit				
	Character of Discharge Notification (Preview)	Pending		Edit				
Items	Items per page: 10 ♀ Skip to page: 1 Go							

Similar to functionality in VBMS-Core, all pending letters must be finalized at the same time.

: Act	ions Add New Letter Finalize Letters			
	Letter	Status	Date Sent	View / Edit
		×		View
	Earlier Effective Date (<u>Preview</u>)	Finalize Correspondence		Edit
	Character of Discharge Notification (Preview)	The following letters will be finalized. Once they have been finalized, you will not be able to modify them. Do you wish		Edit
Items per page: 10 C Skip to page: 1 Go		to continue? • Earlier Effective Date		1
		Character of Discharge Notification		
		Confirm		

Once the Letters are finalized, they will appear in the eFolder.

ERAMY STELE	File #: 7620	058110								Veteran 👻 Intent To	File Claims - Do	cuments Rated Issues
Narrow Results Clear Documents Actions Actions							15	 Veteran Summa 				
- Document Views	Compare Views WARNING: Document sets are pending scarning.						List Items	Scanning Status	Manage Evidence	X veteran Informati		
(0) AI (5)		Collapse Banners	Ants - Showing 1-6 of	6 documents					Last Openeo	Show/Hide Colum	ns Save Preferenc	ssn: 76.
OActive Evidence (6) OVeteran Level (5)			Receipt Date	✓ Document Type	Subject 🗘	System Source 🗘	Source Comment 🗘	Uploading User Role	POA Orga	nization 🗘	Originator First Name	File #: /6, EDIPI: U
Ono Evidentiary Value (0) Archive Bin (0) Hide Duplicates (0)			07/13/2022	Earlier Effective Date Letter	Earlier Effective Date	DocGen		DocGen				Gender: N Birth Date: 1
► Line of Business			07/40/2022	Character of Discharge Notification Letter	Character of Discharge	Declar		DesCar				Death Date: General POA: -
Keyword			07/13/2022		Notification	Dociden		Doccen				eFolder Access:
► Associated Claims			07/08/2022	DRO Process Explanation	DRO Process	DocGen		DocGen				Chg of Addr Auth: SC:
Bookmarks					Explanation							VDPC

Important: unlike VBMS-Core, the Letters UI will not create a package when a user finalizes a letter. Users will need to manually create the package out of the eFolder.

Appendix A: Schedule of LC Letters Being Built into Letters UI²

	Release		Release
Letter	Date	Letter	Date
Character of Discharge Notification	July 24th,		August 7th,
Letter	2022	POA Not of Record	2022
	July 24th,		August 7th,
Earlier Effective Date Letter	2022	HLR Not Timely	2022
	July 24th,	Decision Review Against Pending	August 7th,
Pre-Determination Hearing Letter	2022	Claim	2022
	July 24th,	Decision Review Against Proposal	August 7th,
Returned Mail Letter	2022		2022
Request for Application AMA	July 24th,	Clarification of Decision Review	August 7th,
Review	2022	Request	2022
	July 24th,	SOC Opt-In Notification	August 7th,
Fugitive Felon Due Process Letter	2022		2022
Request for Application	July 24th,	Third Party Authorization Incorrect	August 7th,
Compensation Pension or DIC	2022		2022
Fugitive Felon Final Notification	July 24th,	Local Appeal Hearing Letter	August 7th,
Letter	2022		2022
General Records Request (Non-	July 24th,		August 7th,
Medical)	2022	NOD Not Timely	2022
	July 24th,		August 7th,
PA/FOIA Final Response	2022	Form 9 Not Timely	2022
	July 24th,	Receipt of Unsolicited Evidence	August 7th,
PA/FOIA Acknowledgment Letter	2022		2022
FOIA Rejection Privacy Act	July 24th,		August 7th,
Acknowledgment Attorney	2022	Invalid Direct Deposit Update	2022
	July 24th,		August 7th,
PA/FOIA No Folder Established	2022	NOD Against Proposal	2022
	July 24th,	Active ITF Notification	August 21st,
PA/FOIA No Record	2022		2022
	July 24th,		August 21st,
PA/FOIA VA Exam	2022	IDES Return to Active Service	2022
	July 24th,		August 21st,
PA/FOIA No Judge Signature	2022	Incorrectly Established Claim	2022
	July 24th,		August 21st,
PA/FOIA No Signature	2022	Exam Appointment	2022
	July 24th,	Withdrawal of Claim	August 21st,
No Exclusive Contact to Veteran	2022	(Comp/Pension)	2022
	July 24th,	Suspension of Claim Due to Return	August 21st,
Travel Board Video Conference	2022	to Active Duty	2022
	July 24th,		August 21st,
DRO Process Explanation	2022	IDES Benefits Estimate	2022

 $^{^{\}rm 2}\,{\rm This}$ schedule is subject to change depending on testing and other factors.

Request For Application -	July 24th,	Debt to Veteran for Failure to	September
Dependency	2022	Withhold Attorney Fees	4th, 2022
	July 24th,	Fee Recoupment Procedures-Final	September
Annual Clothing Allowance Letter	2022	Notice	4th, 2022
Request for Application - Helpless	July 24th,	Dependency Claim Missing	October
Child	2022	Information	16th, 2022
Application or Form - Incomplete,	August 7th,	Attorney Revocation Letter to	October
Unclear, or Outdated	2022	Veteran	16th, 2022
	August 7th,		October
Withdrawal of AMA Claim	2022	Invalid Fee Agreement	16th, 2022
Non-BDD Claim-Request	August 7th,	Attorney Revocation Letter to	October
Resubmission	2022	Attorney	16th, 2022