

VBMS- R Import Evidence Tab Job Aid Transferring Evidentiary Data from VBMS Core to the VBMS-R Import Evidence Tab

Background

The Office of Benefits Automation (OBA), in collaboration with the Office of Business Integration and Subject Matter Experts from Compensation Service, Pension & Fiduciary Service and Rating Veterans Service Representatives (RVSRs) from the field, have developed enhanced Automated Evidence Upload functionality in Veterans Benefits Management System – Rating (VBMS-R).

On January 28, 2024, VBMS Release 32.7 will implement an automated solution that will allow claims processors to identify and easily transfer evidentiary data from VBMS Core to the VBMS-R Import Evidence tab.

This update will allow claims processors to send evidence to the Import Evidence tab while performing their review. This enhancement will improve workflow and help to minimize duplication of efforts, while improving accuracy for rating decisions.

This job aid provides information on how to use this tool in VBMS Core.

Note: the VBMS images on the following pages illustrate fictional Veterans.

Instructions

Option 1: From VBMS-Core, select the document to be transferred to VBMS-R:

The screenshot shows the VBMS web interface. The top navigation bar includes 'Search', 'Work Queue', 'Fiduciary', 'Intake', 'Unassociated Documents', 'LCM Unassociated', and 'Scorecards'. The main content area displays a table of documents. The first document is highlighted in blue. A red box highlights the 'Opened by Me' column for this document. The document details on the right include: SSN: [redacted], File #: [redacted], ICN: Unavailable, EDIPI: Unavailable, Gender: Male, Birth Date: 06/18/1942, Death Date: [redacted], General POA: [redacted], eFolder Access: No, Chg of Addr Auth: No, and VR&E Eligibility: [redacted].

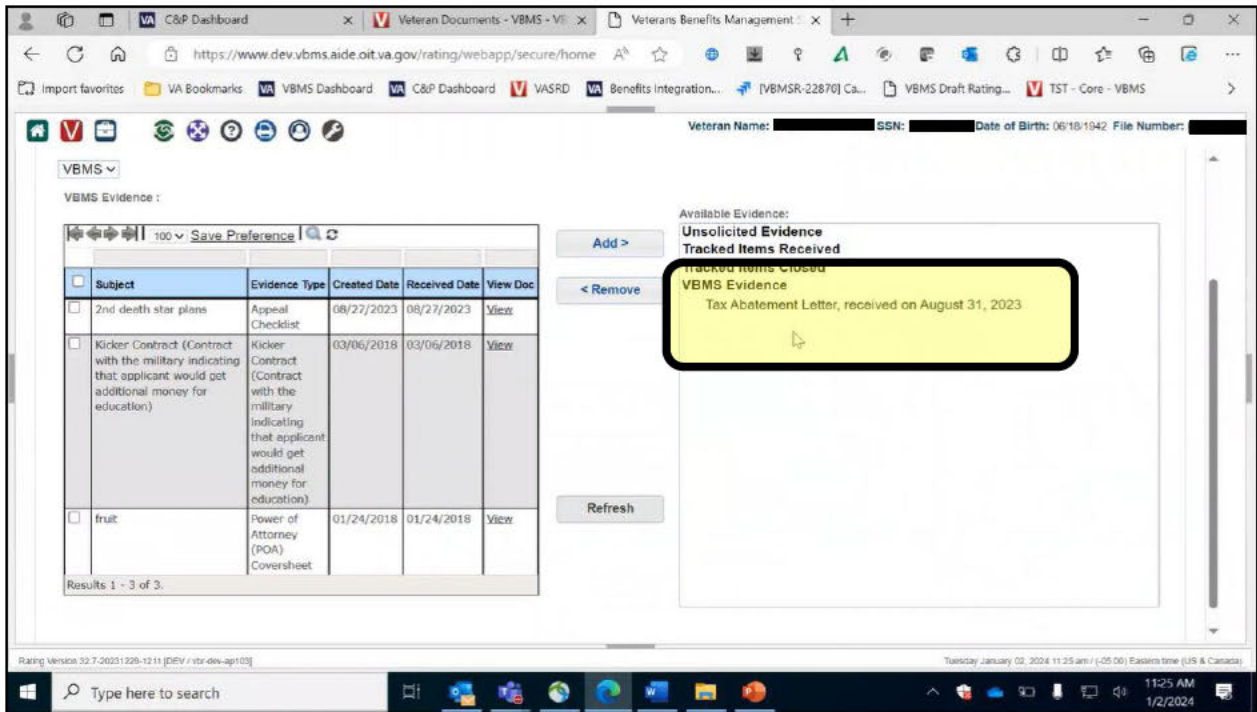
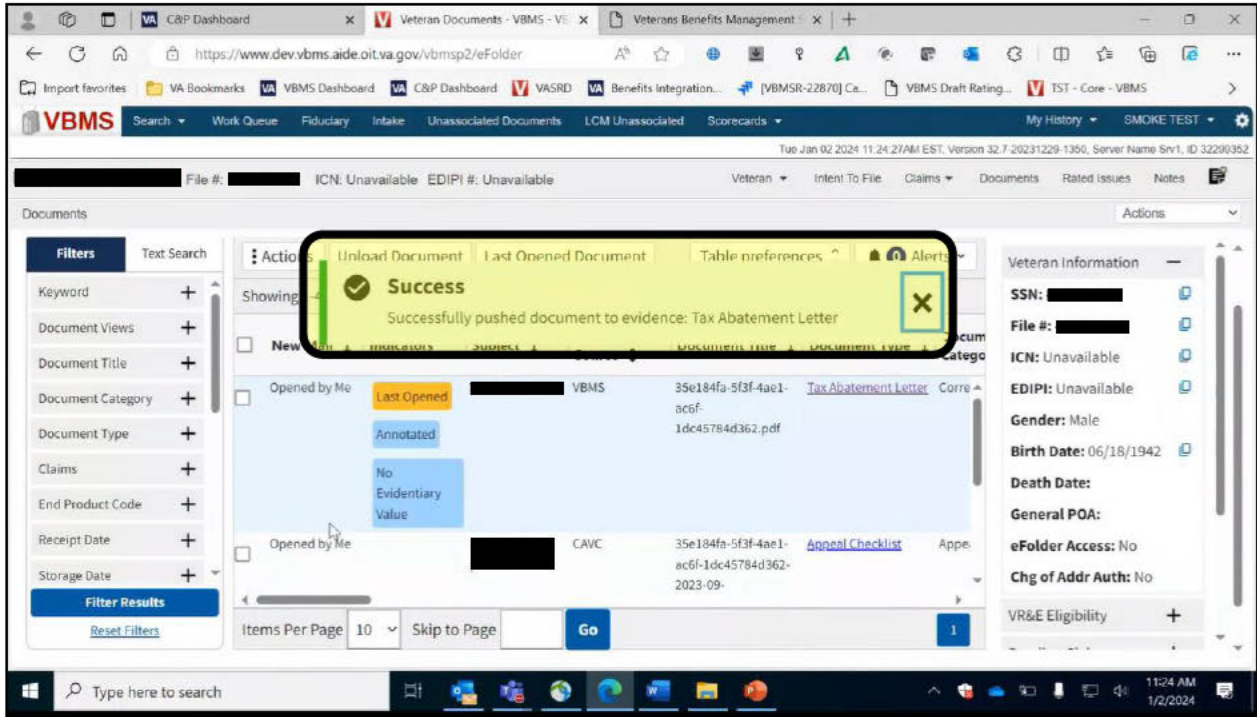
Document Title	Document Type	Document Category
35e184fa-5f3f-4ae1-ac6f-1dc45784d362.pdf	Tax Abatement Letter	Corre
35e184fa-5f3f-4ae1-ac6f-1dc45784d362-2023-09-	Appeal Checklist	Appe

Then, from the “Actions” drop-down menu, select “Push to Evidence.”

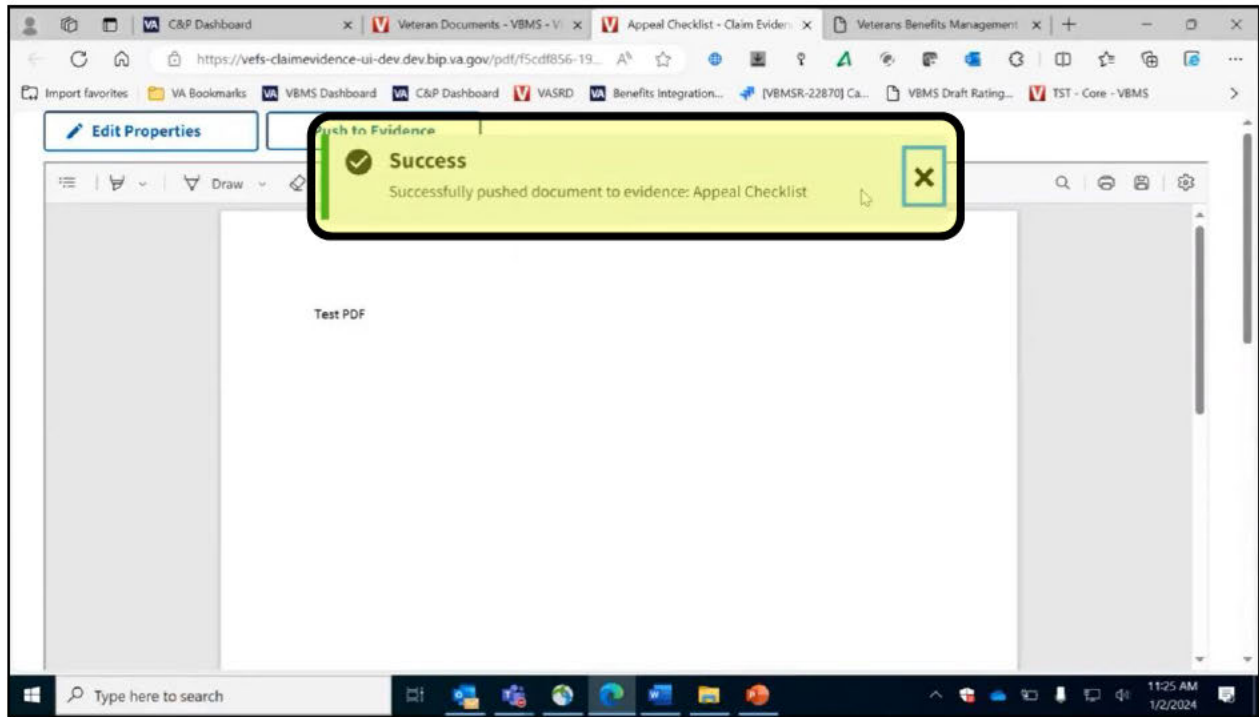
The screenshot shows the VBMS web interface with the 'Actions' dropdown menu open. The menu options are: Actions, Open (Read Only), Move, Mark as No Evidentiary Value, Unmark as No Evidentiary Value, Move to Archive Bin, Manage Duplicate Documents, Mark as Open, Mark as New, Annotate, Add to Package, Push to Evidence, and Open by Me. A red box highlights the 'Push to Evidence' option. The document details on the right are the same as in the previous screenshot.

Document Title	Document Type	Document Category
35e184fa-5f3f-4ae1-ac6f-1dc45784d362.pdf	Tax Abatement Letter	Corre
35e184fa-5f3f-4ae1-ac6f-1dc45784d362-2023-09-	Appeal Checklist	Appe

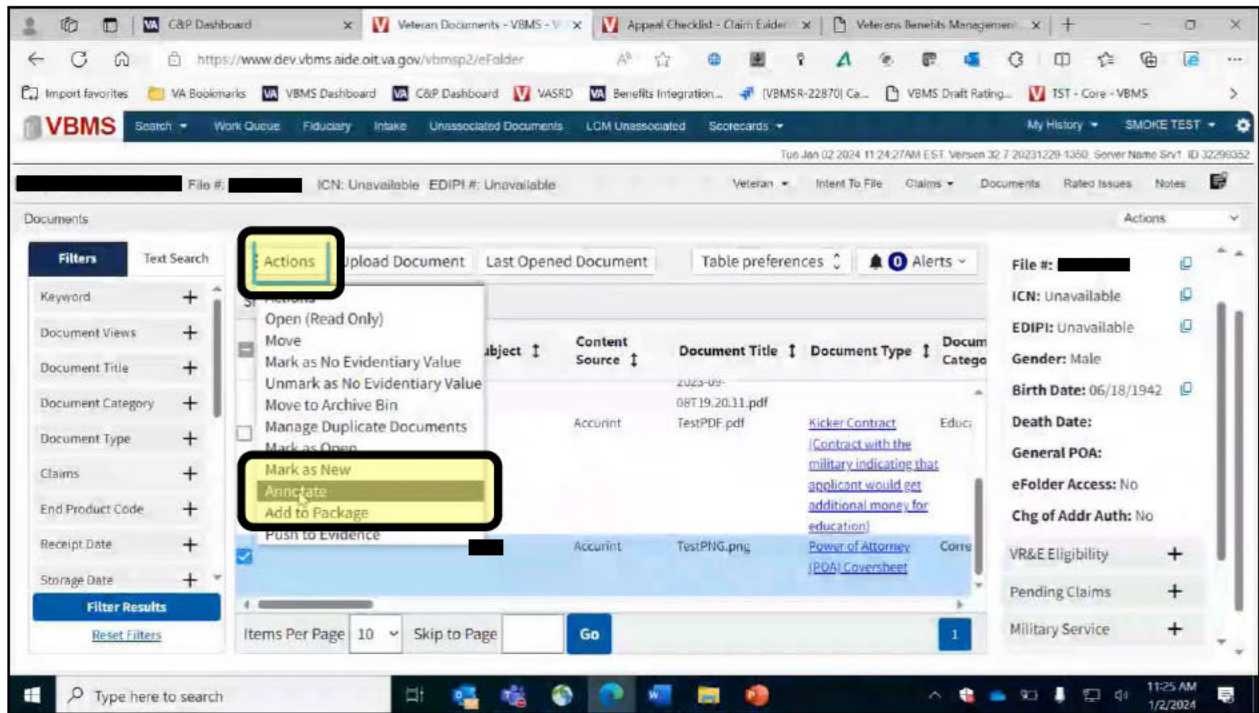
A dialog box will appear to advise that the document was pushed successfully, and the file will appear in VBMS-R:



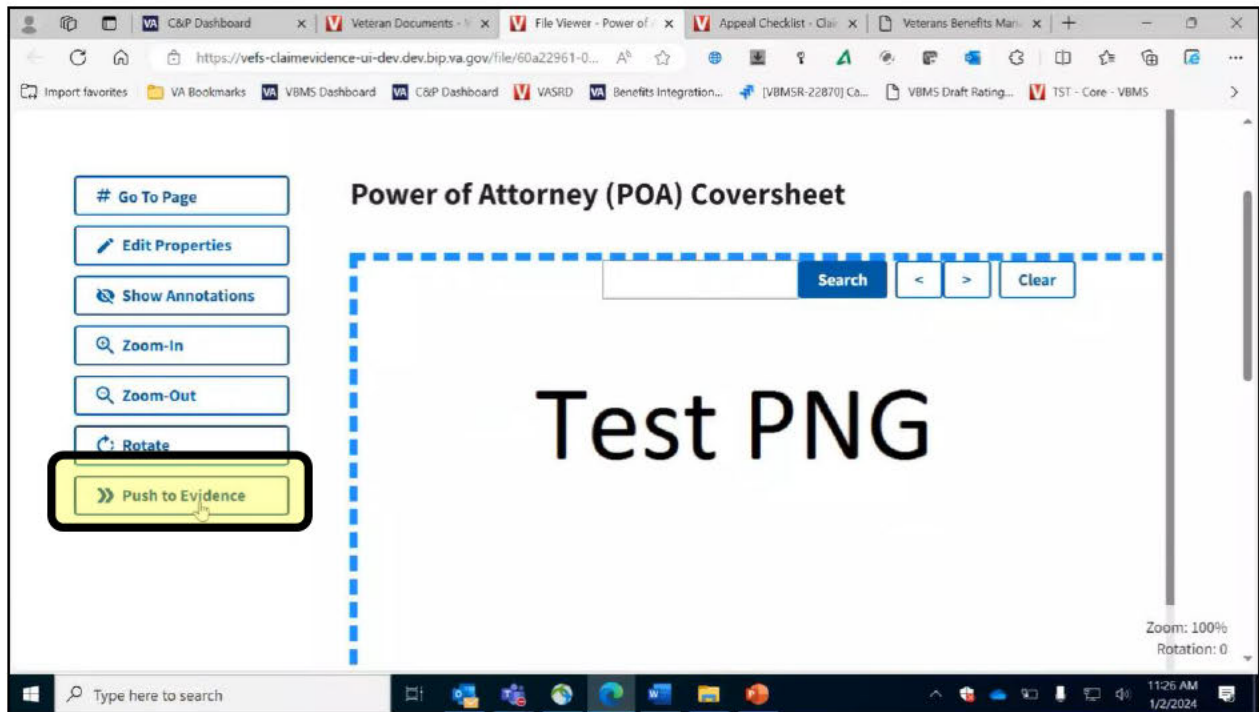
A dialog box will appear to advise that the document was pushed successfully, and the file will appear in VBMS-R:



Option 3: From VBMS-Core, select the document to be transferred to VBMS-R, and from the “Actions” drop-down menu, select “Annotate.”



Annotate the document as desired and select “Push to Evidence” upon completion:



A dialog box will appear to advise that the document was pushed successfully, and the file will appear in VBMS-R:

