CENTRALIZED MAIL (CM) PORTAL TRAINING - SMS
TRAINEE HANDOUT

Table of Contents

OBJECTIVES

- Using the trainee handout packet and references, demonstrate how to access the CM Portal, with 85% accuracy.
- Using the trainee handout packet and references, identify the features and function of the CM Portal, with 85% accuracy.
- Using the trainee handout packet and references, discuss the process for viewing mail in the CM Portal, with 85% accuracy.
- Using the trainee handout packet and references, distinguish the difference in functions between those of the Super User and User, with 85% accuracy.
- Using the trainee handout packet and references, demonstrate the method for uploading the mail to VBMS, with 85% accuracy

References

- CM Portal User Manual
- CM Portal Super User Manual
- CM Standard Operating Procedures

TOPIC 1: ACCESS AND GENERAL FEATURES/FUNCTIONS OF THE CM PORTAL

Access and Login

A user account is required to access the *CM Portal* system. An email notification will be sent to users providing a user name and temporary password. That email will also provide a link/URL address for accessing the system. If the link does not work, copy the URL address provided in the email and paste the URL into web browser and hit enter. The Login page will be displayed. Type in user name and password" and click on the Log On button.

First time login to the system will require user to change password. New password must be at least 8 characters long, contain upper and lower case letters, at least 1 number and 1 special character.

Successful login will take you to the Home Page.

Recover Password

If user forgets password, enter Username and click on "Forgot Password" link under the Login tab. An email will be sent providing the User a temporary password which must be changed.

Home/Landing Page

The Home Page is also known as "Work Queues". Based on the role assigned, User and Super Users will have access to different queues.

The Home Page is composed of three parts. The top portion of the screen is identified as the Collybus section. Currently three features are present in this section.

- **Search -** The search feature allows the user to filter on document index values for document retrieval.
- **Upload -** The upload feature allows the user to upload a new document directly into the workflow. ***This feature is currently not available***
- **Workflow** - The workflow feature will return the User and Super User to their default queue

The Search function allows a User to search the portal for specific mail packets. Under the *Select Search* there will be a dropdown. Current option includes: "Workflow". There are also Search Fields in which the User will input data for specific search. Available fields for current search include:

- Current RO – Allows the User to search by specific RO. Must enter Station Name not

Station number.

- SMS Package Tracking # - Allows the User to search for a specific SMS Package Tracking number
- Assigned User – Allows the User to search by Assigned User
- Received Date – Allows the User to search by date
- First Name – Allows the User to search by specific first name
- Last Name – Allows the User to search by specific last name
- Veteran File ID# - Allows the User to search by claim number
- SSN – Allows the User to search by SS Number
- Street Address – Allows the User to search for a packet by specific address. Does not require User to include City and State. Must match address in system.
- City – Allows the User to search for a packet from a specific city. Should be entered in conjunction with a state for a more refined search.
- State – Allows the User to search for all packets with an address at that specific state. Must enter the States two letter abbreviation
- Zip – Allows the User to search for packets by specific zip code
- Doc Notes - (not currently active)

The User may select more than one field for a more refine search.

The button to the right of each field provides input tips or pre-determined values to aide in entering the right kind of data for that field.

 When clicked, displays a list of 'wild card' characters and operators that can be used alongside values entered into the search fields. The question mark button helps you compose the right string of wild cards and operators to ensure results.

NOTE: Most wild cards and operators should be placed before the value.

- Entering just a value into a field will only search for that exact value.
- Entering in an expression that starts with an operator (<, >, <>) will trigger interpretation of the value as a 'search expression'.
    - ***NOTE:*** *When using expressions, the results will take longer to return than if using exact value filters.*
- Less than (<) and greater than (>) only apply to date, time and integers. Equal/not-equal applies to all values.

- A string search does not require “_”, except when it may contain control characters. Example: “Hello, my name is”. The comma after Hello is a control character.
- Strings can contain a wildcard character to do a partial match, i.e. *Hello*.
- Dates should be entered as Month/Day/Year or Month-Day-Year. Either ‘/’ or ‘-‘ can be used as a separator (it does not have to be consistent). A date is considered a time range for the entire day.
- Time should be entered as Month/Day/Year Hour:Minute:Second.Millisecond (am or pm). Eokither ‘/’ or ‘-‘ can be used as a separator (it does not have to be consistent). Minute, second, millisecond and am/pm are all optional. If omitted, defaults to 0 and am. Times must be an exact match. If a range is desired, use a comma or enter a date.
- A range of values uses a comma separator, i.e. 1,5 or 1/1/2012,5/1/2012
- A list of possible values use a semi-colon separator, i.e. 1;2;3;4;5 or 1/1/2012;1/15/2012;1/20/2012

 When clicked, allows the user to select a single ‘text’ value from a pre-determined dropdown list.

 When clicked, allows the user to select a value *according to corresponding field*. For example, date field produces a list of date ranges; refund reason produces a list of reasons, etc.

- Edit - Displays the *Edit User Searches* window and allows you to save a customized user search (more info in next section).
- Select Defaults - Set the current customized search as the default search to display upon log in. Once a default has been set, click the button again to clear it as desired.
- Counts - Displays the Search Result Counts window. Shows the quantity of documents available according to document type.

The results of what User searched for in the Search Field window on the left display in the Results Grid on the right. From the Results Grid, documents can be modified multiple different ways.

- Package Status – Processing or Completed
- Current RO -
- SMS Package Tracking
- Assigned User
- Received Date
- !
- Doc Type
- First Name

- Last Name
- Veteran File ID #
- SSN
- Street Address
- City
- State
- Zip

Any of the above fields can be sorted.

Home Page – Work Queue

The Home Page, is also known as the Workflow Queues.

The User and Super User views will slightly differ based on assigned queues.

Available to the left of the screen are assigned queues based on role.

The User is presented with two queues:

- Hold Queue – mail packages placed on hold which require additional information in order to continue processing

- Work Queue – mail packages assigned to Users and pending processing

The Super User is presented with five queues:

- Assignment Queue – mail packages that will be assigned to the User for processing

- Authorization Queue - mail packages a User has returned for rescan or split which Super User will approve or deny

- Hold Queue – mail packages placed on hold which require additional information in order to continue processing

- Reassign Queue – mail packages to be transferred to another RO

- Work Queue – mail packages assigned to Users and pending processing

Listed to the right of each queue is a number which represents the number of mail packages available for review.

TOPIC 2: VIEWING MAIL IN THE CM PORTAL

Workflow Queues

Select the desired queue by placing a check mark in the box. To the right of the screen, the system will return a listing of all available documents currently waiting processing in a results grid. This will only appear if the box to the left of the queue is checked.

The results grid columns will include:

- View Document Indicator
- Workflow Queue Name
- When Added (date/time the document was added to queue)
- Assigned User (Work Queue only)
- Instruction (Work Queue only)
- Received Date (date received by VA/contract site)
- SMS Package Tracking #
- Veteran file ID #
- SSN
- Last Name
- First Name
- ! (Priority document indicator)
- Doc Type (Lists priority documents present in the package)
- Error Return Reason (if attempt to upload failed)

Each queue will display 100 packages at a time. At the bottom of the list of packages, users can navigate to different pages of the queue by selecting the arrows or entering which page to display.

There are two methods for viewing available documents in a queue. The user may choose to mark the box to the left of the queue which will display all available documents in the queue. The User can then selected any of the available document packages by clicking on the folder icon.

The User may also view the first available document by clicking on the queue bar.

Sorting

Users and Super Users have the ability to sort within the queues to quickly identify packages. The sort button located at the top of the page contains several options which can be used together to quickly identify a package you may be searching for.

Select the Sort dropdown, and choose your sort preference. If you would like to return the queue to the original view, select Default from the dropdown. Sorting options and their descriptions are below:

- Default – ascending order of date of receipt
- Assigned User – ascending order of whom the package is assigned to, based on first name
- Doc Type – Descending order of document type
- Doc Type & DOR – Descending order of document type, then ascending order of date of receipt
- Doc Type & Vet File ID # – Descending order of document type, then ascending order of file number
- DOR & Doc Type – Ascending order of date of receipt, then descending order of document type
- Package Contains Trigger Doc – All items with trigger documents
- Package Contains Trigger Doc & Doc Type – All items with trigger documents, then by order of document type
- Package Contains Trigger Doc & DOR – All items with trigger documents, then by ascending order of date of receipt

Actions

The Actions buttons are found on the main queue page as a quick Action dropdown. These same Actions buttons can be found in the Workflow Processing Page.

- Re-route – Allows the User and Super User to send the mail package to the reassignment queue.

- Hold – Allows User or Super User to move/transfer a package to the hold queue. A note may be placed in the hold reason; however, it is not necessary. Documents should not be placed on hold unless it is absolutely necessary.

- Complete – This action will allow the User or Super User to upload the package to VBMS or send package to the Authorization Queue.

- Assign – Only the Super User can access this button. By selecting this button, the Super User will be able to assign packages to available Users. A drop down menu will list all available Users within the RO, as well as how many packages are assigned to each User in parenthesis. A second drop down menu allows the Super User to select an instruction. Choices include Index Document or Index Package. Either instruction option can be selected; there is no difference. If a Super User is assigning work from the main queue screen, multiple packages can be selected and assigned by marking the check box at the left of each desired mail package, and then selecting Assign from the quick Actions dropdown.

Workflow Processing Page

Selecting the View envelope on the main queue will take the user to that specific mail package in the processing window. Users are also able to access the mail package by clicking on the desired Queue bar on the left, which will automatically launch the first mail package available in the processing window.

There are several functions in the mail package view.

The grid at the top left provides the user a list of all documents in the mail package. Next to the grid are Actions and Task buttons. Immediately below the grid are view buttons and tools.

The left section of the page includes the thumbnail view of the documents. The main document view is displayed in the center of the screen. The right section includes the document status.

Each section will be explained in greater detail.

Package Level Processing

Package level processing includes all document types found in a mail package.

Mail Package Grid

The grid provides the user a view of the mail package level. The mail package level contains:

- DDoc ID – Number assigned to the type of document received
- Collybus ID – Unique control number assigned to each document by the scanning vendor
- Doc Type – Will always be Vet Doc
- Status – Document Level Status that is assigned based on action taken by users
- Received Date – Date received by the scanning vendor

The package may contain one document or there may be several documents. To view a document, the user must select the desired document by clicking on a row within the grid. Left click once and the first page of the document will be displayed in the center of the screen. The user can select other rows within the mail package grid to review other documents.

Thumbnail View

To the left of the main document view, the thumbnail view of all the pages in that particular document will appear. User can choose to hide the thumbnail view by clicking on the small grey shaded panel bar between the thumbnails and main image. Multiple documents can be selected to view more than one thumbnail document at a time by holding Ctrl on the keyboard and left clicking the desired documents, or by holding Shift on the keyboard and selecting the first and last rows of the desired group of documents.

To review each page within the document type, the user can click on the any page within the thumbnail view, or the user may choose to use the view buttons immediately above the thumbnail and document view.

Document View

This view displays in the center of the page. The first page in the selected document type is shown. To select the next page the user can click on the next page in the thumbnail view, or can choose to use the navigation buttons above the main document page.

Actions and Tasks Features

The buttons displayed will depend on the queue that was selected. As previously informed, the Actions buttons available on the Main Queue screen are also available on Workflow Page.

Work Queue

The following Actions and Tasks buttons are displayed when in the Work Queue.

- Re-route – Allows the User and Super User to return the mail package to the reassignment queue. When selected a pop-up window will display asking the user to select Ok or Cancel.

- Hold – Allows User or Super User to move/transfer a package to the hold queue. A note may be placed in the hold reason, however, it is not necessary. Documents should not be placed on hold unless it is absolutely necessary. When selected, the user will be prompted for a Hold Reason, which can be entered as free text. The user will select Ok or Cancel.

- Complete – This action will allow the User or Super User to send a package to VBMS or the Authorization Queue. When selected, a pop-up window will display asking the user to selected Ok or Cancel.

- Assign – Only the Super User can access this button. By selecting this button, the Super User will be able to assign package to available Users. A drop down menu will list all available Users within the RO, as well as how many packages are assigned to each User in parenthesis. A second drop down menu allows the Super User to select an instruction. Choices include Index Document or Index Package. Either instruction option can be selected; there is no difference. If a Super User is assigning work from the main queue screen, multiple packages can be selected and assigned by marking the check box at the left of each desired mail package, and then selecting Assign from the quick Actions dropdown.

To the right of the Actions Buttons are two Task buttons. They include:

- Index – User must update the following fields in order to complete upload to VBMS: Veteran First Name, Veteran Last Name, and Veteran File ID. Failure to update this information will result in failure to upload package to VBMS.

- Close – Allows user to close out of current package and return to the results grid under the main search screen.

Index Button – Emergent Claims

Included in Indexing is an “Emerg” field. This allows the User to designate the claim as “Emergent” by assigning an Emergent Code to the package, if applicable. The User should click on the down arrow and selected the appropriate category from the list. The code will display at the top of the drop down list. User must click on Save to save selection. Only one selection can be made from the list.

- TERM – Terminally ill claimants
- SERW – Veterans that were seriously injured in service and are not receiving benefits
- FINH – Claimants that are suffering from extreme financial hardship
- FPOW – Former Prisoners of War and their survivors
- HOME – Homeless Veterans
- SUIC – Suicidal claimants
- ALS – Diagnosed with Amyotrophic Lateral Sclerosis (ALS) or Lou Gehrig's Disease
- AGE - More than 85 years old
- HONR - Received the Medal of Honor

Hold Queue

The following Action and Task buttons are displayed when in the Hold Queue. Either user can mark a mail package on “Hold”.

- Return – Allows the User and Super User to move mail package back into the Work Queue. A pop-up window will display.
- Index – User must update the following fields in order to complete upload to VBMS: Veteran First Name, Veteran Last Name, and Veteran File ID. Failure to update this information will result in failure to upload package to VBMS.
- Close – Will take Super User back to main menu.

Assignment Queue

Only the Super User will have access to this queue. The Super User will have the option to Assign, Re-route, or work a mail package from this queue.

- Assign - Super User will select the Assign button. The program will return an assignment select pop-up window. The Super User will select the user name from the drop down as well as select the instruction for action. This will route the mail package to the defined user for processing.
- Re-Route – Super User will select the Re-Route button. The program will return a 're-route' pop-up window. This will send the mail package to the Reassign Queue for processing.
- Index – User must update the following fields in order to complete upload to VBMS: Veteran First Name, Veteran Last Name, and Veteran File ID. Failure to update this information will result in failure to upload package to VBMS.
- Close – Will take Super User back to main menu.

Reassign Queue

Only the Super User will have access to this queue.

- Route – Super User can route mail package to another RO. A pop-up window will display. From the drop down the Super User will select the appropriate RO.
- Index – User must update the following fields in order to complete upload to VBMS: Veteran First Name, Veteran Last Name, and Veteran File ID. Failure to update this information will result in failure to upload package to VBMS.
- Close – Will take Super User back to main menu.

Authorization Queue

Only the Super User will have access to this queue. The Super User has the ability approve or deny a rescan or split request by a User.

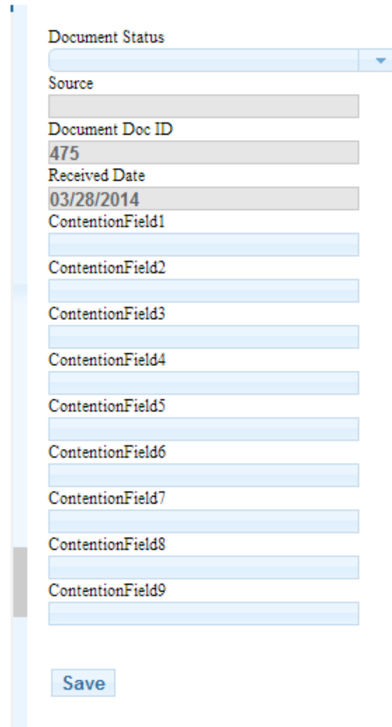
- Approved Rescan requests will be routed for final authorization by the COR user group.
- Approved Split requests will be routed to scanning vendor for corrective action on mail package.
- Denied Rescan requests will be routed to the Work Queue with a denial error.
- Denied Split requests will be routed to the Work Queue with a denial error.

Work Queue: Document Level Processing

The user can select any of the documents within the mail package to view & modify index values; some index values are restricted and cannot be edited by the user. Non-editable fields are highlighted in grey. The Document Status is editable by the user.

Document Status

- The user can modify the document status to one of the following:
  - Complete
    - User should select this if the document is ready to send to VBMS
  - Re-scan
    - User should select this if the document image is unclear and should be rescanned
  - Split
    - User should select this if the document contains mixed Veteran information that should be processed separately
  - Reject – Download Complete
    - User will select this action if the document needs to be removed from the queue, i.e., mail for other business lines that is sent via email to the business line
  - Unidentifiable Mail
    - Users can designate that the mail package as 'Unidentifiable Mail'.



After the selection of the appropriate action in the Document Status dropdown, the User will select Save, then select the Complete icon to send to VBMS or the Authorization Queue.

TOPIC 3: VIEW BUTTONS AND TOOLS

Additional Functions

Image Navigation

Click the “Arrow” buttons to navigate between documents.

Use the page number selector to jump to a specific page.

Rotating Images

Click the “Rotate” buttons to turn pages within the document.

Rotating an image only affects the view of the document as displayed to the current user and does not change the underlying file (i.e. saves rotation).

Zoom

Click the “Fit All” button to see entire document.

Click the “Fit Width” button to expand width to entire width of view.

Use the page layout drop down menu to choose view percentage.

Brightness and Contrast

Click the “Adjust Brightness and Contrast” button to adjust the brightness and contrast.

Append Pages (not currently active)

Click the “Append Pages” button to insert a document.

Replace Content (not currently active)

Click the “Replace Content” button to replace a document with a new document.

Version Number and Toggle (not currently active)

Use the Versions drop down menu to select, view and/or download a previous version of the document. This applies when the original image file is modified via ‘edit’, ‘append’ or ‘replace’ functions.

Email a Document

Select this button to attach the file to an email.

Save or Print a Document:

Once a document is presented, you may find the need to save or print a copy. For example, if the mail belongs to another business line, you will need to save (download) and email the document. To do this, select the "Adobe PDF" icon. Choose from the following download options:

- **Download Current Document**: Brings up all pages of the document to view in Adobe Acrobat Reader.

- **Download Current Page**: Brings only the image currently in the image viewer to view in Adobe Acrobat Reader.

- **Download All Documents**: Brings up all pages of the document to view in Adobe Acrobat Reader.

To email a single document, you can select the envelope icon in the PDF. To email multiple documents, you must save them and add them as attachments to the email. Make sure your email is sent encrypted.

After the document has been emailed, if it needs to be removed from the portal (such as with mail emailed to other business lines), the user will have to mark the mail as "Reject; DNP – Sent to LTS only" from the Document Status, then select "Save" and "Complete."

If printing is desired, select the printer icon or select "File" then "Print" within the PDF to choose the print options.

Notes

Notes can be added to any document and be available for view by anyone with permission to view the document. Access the notes screen by clicking the Notes icon. From the pop-up window click on the +. Another pop-up window will display and user can free style any message. When notes have been added to a document, the notes icon will be highlighted yellow. Click on the yellow note icon to view notes. Notes will not transfer to VBMS.

Additional Information

Establishing controls, updating evidence, and updating systems will be done the same way user has always done it. The only change is that the mail is now being viewed in an electronic environment by way of the CM Portal.

Date of claim – User is responsible for ensuring that CEST is based on earliest date stamp.

All actions (CESTing, Updating Systems, Updating Evidence, etc.) must be completed prior to uploading mail to VBMS.

If file exists at RO, make sure that file is transferred to the scanning site.

Ensure that an eFolder exists prior to uploading materials to VBMS.

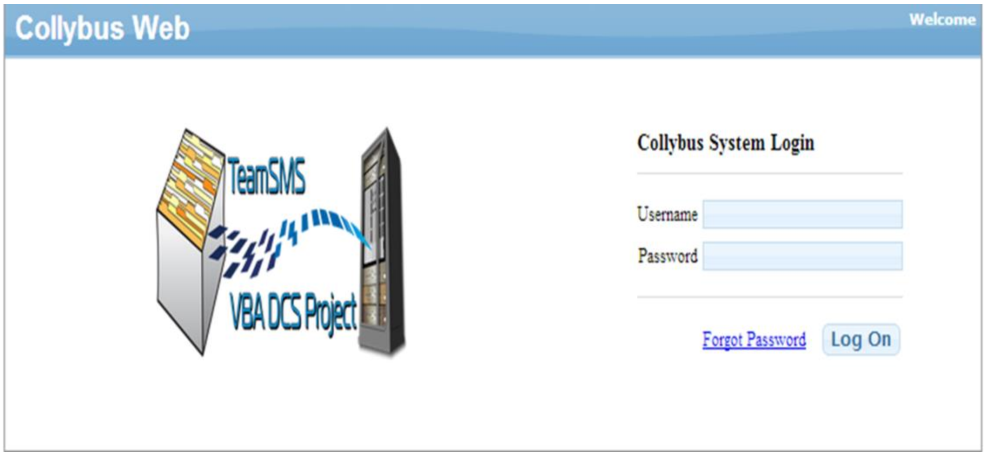
Misfiled and Misdirected Mail (Attachment B)

Current process for dealing with Misfiled or Misdirected Mail. This would include mail belonging to other business lines: PMC, Education, Voc Rehab, etc.

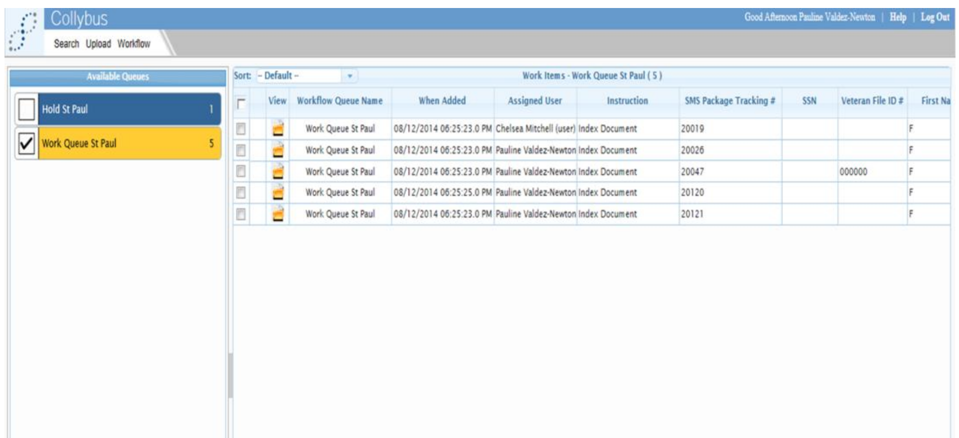
1. Veterans sends paper claim
2. Postal service redirects mail to the scan vender
3. Claim arrives at scan vendor
4. Claim scanned and data extracted
5. IPC receives misfiled or misdirected mail
6. IPC uses Download function in portal
7. Document sent to appropriate business line via email (per SOP)

ATTACHMENT A: PORTAL SCREENS

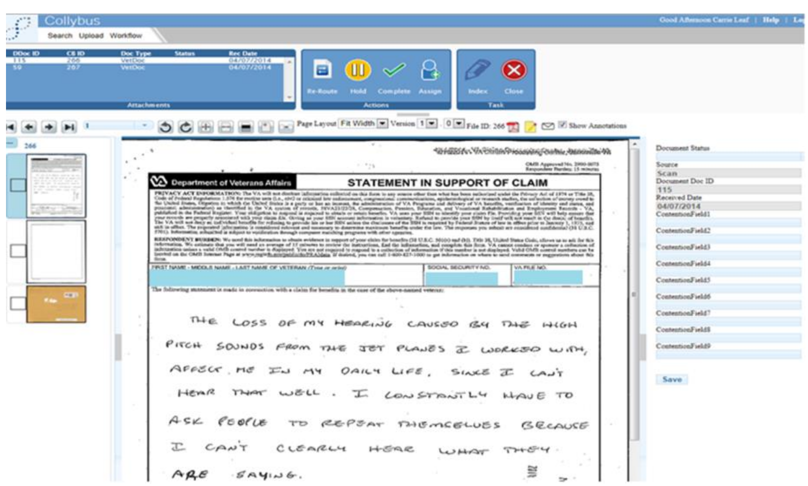
LOGIN SCREEN



WORKFLOW QUEUE VIEW



PACKAGE VIEW



ATTACHMENT B: MISFILED AND MISDIRECTED MAIL