Centralized Mail (CM) Portal Training - SMS

Instructor Lesson Plan

Time Required: 3 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 # TBD

PREREQUISITES Prior to this lesson, the Claims Assistant (CA) should have completed CA pre-requisite lessons on VBMS Claims Establishment, CEST and EP Controls in SHARE, Mail Management, and Duplicate C (DUPC) Files and Folder Establishment.

TARGET AUDIENCE The target audience for Centralized Mail (CM) Portal lesson is CA Entry Level.

Although this lesson is targeted to teach the CA Entry Level employee, it may be taught to other VA personnel as mandatory or refresher type training.

TIME REQUIRED 3 hours

MATERIALS/ TRAINING AIDS Lesson materials:

- Introduction to CM Portal PowerPoint Presentation
- Introduction to CM Portal Trainee Handout Packet
- CM Portal User and Super User Guides
- CM Standard Operating Procedures

TRAINING AREA/TOOLS The following are required to ensure the trainees are able to 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
- VBA Learning Catalog to access training materials
- Connection to the LAN applications including permissions to CM Portal, Virtual VA, and VA Legacy Systems
- Live Cases within the CM Portal for the practical exercise.

PRE-PLANNING

- ☐ 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.

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.
- ☐ Provide a sign in sheet and at the conclusion of the session, ensure that all trainees sign in.

INTRODUCTION TO SMS CENTRALIZED MAIL (CM) PORTAL

INSTRUCTOR INTRODUCTION

Complete the following:

- Introduce yourself
- Orient learners to the facilities
- Ensure that all learners have the required handouts

TIME REQUIRED

.25 hours

PURPOSE OF LESSON

Explain the following:

This lesson is intended to introduce the trainees to the Centralized Mail (CM) Portal. Trainees will learn how to access the system, retrieve and view the records in the system, transfer records, plus upload mail in the CM Portal into VBMS. This lesson will contain discussions and exercises that will allow user to gain a better understanding of:

- Accessing the CM Portal
- Identifying General Features and Functions of the CM Portal
- Viewing mail in the CM Portal
- Differentiating Super User and User Functions
- Uploading mail in the CM Portal into VBMS

LESSON OBJECTIVES

Discuss the following:

In order to accomplish the purpose of this lesson, the CA will be required to complete an assessment that CM Portal the following lesson objectives:

The CA will be able to:

Slide 2

Handout 2

- 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, differentiate the functions 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

Explain the following:

Each learning objective is covered in the associated topic. At the conclusion of the lesson, the learning objectives will be reviewed.

This lesson contains three sections. First section covers handout and PowerPoint training. Second section includes portal demonstration. Third section allows for employee hands-on training.

MOTIVATION

On a daily basis, VBA processes approximately 80,000 pieces of mail throughout its 56 Regional Offices. The average control time nationally is 22 days. By developing a centralized mail system, VA expects to decrease the amount of time it takes to control mail, thereby achieving the goal of processing claims in 125 days with at least 98 percent accuracy. Additionally, VBA continues to strive for a 100 percent paperless environment.

The (CM) Portal is an "electronic mail" system that will be used extensively for reviewing incoming Veteran Service Center (VSC) mail. Future plans include adding other business lines. The Intake Processing Center (IPC) will have the responsibility of placing mail under control, transferring mail to other ROs, and uploading the mail into VBMS. The CM Portal will reduce the likelihood of "lost" mail as all mail will be scanned. Additionally, the automated transfer and receipt of mail will provide more efficient service to our Veterans resulting in a positive experience.

Plus, work can be accomplished from almost anywhere. If any RO has to close operations due to weather, training, etc., another RO can assist.

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

STAR ERROR CODE(S)

The Systematic Technical Accuracy Review (STAR) Program reviews cases and considers them either "accurate" or "in error" for the purpose of measuring accuracy. The following are examples of "Date of Claim" errors called during past STAR reviews.

Please discuss the common errors with the trainees.

- Claim was date-stamped in RO on 5/20/13. The correct date of claim is date the claim was received. 38 CFR 3.400(b)(2)(i)
- The Veteran submitted claim prior to discharge. Therefore, the earliest date of claim would be the day following discharge. M21-1MR III.i.1.2.b
- Veterans claim was received 7/27/12, as shown by VA Form 21-0820, dated stamped 7/30/12. DOC should be earliest date claim is received at a VA facility. *M21-1MR III.i.1.2.b; *FL 13-10

REFERENCES

Slide 3

Explain where these references are located in the workplace. They can all be found on the Compensation Service Centralized Mail TIP Sheet http://vbacodmoint1.vba.va.gov/bl/21/Transformation/docs/cm.pdf.

Handout 3

- CM Portal User Manual
- CM Portal Super User Manual
- CM Portal SOP

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

INTRODUCTION

This topic will demonstrate to the trainee how to access the CM Portal. It will also allow the trainee to identify the general features and functions of the CM Portal.

TIME REQUIRED

.25 hours

OBJECTIVES/ TEACHING POINTS

Topic objectives:

- Using the trainee handout packet and references, access the CM Portal, with 85% accuracy.
- Using the trainee handout packet and references, identify features and function of the CM Portal, with 85% accuracy.

The following topic teaching points support the topic objectives:

- Purpose of the CM Portal
- Access and Login
- Features and Functions of the CM Portal

Purpose of CM Portal

Slide 4

CM will transition VBA mail operations from the current decentralized mail processing to a centralized receipt and virtual analysis concept by using the United States Postal Service (USPS), contractor-operated scanning and automated work routing processes to add VA claimant correspondence received via mail directly to the Veterans Benefits Management System (VBMS) eFolder.

The Centralized Mail Processing (CM) Portal application is "virtual mail" in an electronic environment. It is the primary tool used in the IPC for reviewing mail, transferring mail and uploading mail into VBMS. Mail will be analyzed on-line versus paper.

Features and Functions

Slide 5

The CM Portal application has the following features.

Login Page

Home Page

- Super User Queues
- User Queues
- Options

Processing

- Package Level Processing
- Document Level Processing

View Buttons and Tools

User Functions

Slide 6

The portal supports three user roles.

Basic User - The Basic User will be able to view their assigned mail packets within their RO. The Basic User will also be able upload the mail packet into VBMS, download and email mail packets belonging to other Business Lines, reassign packet from one office to another, and request for packets to be Rescanned , Split or sent for Unidentifiable Mail.

Super User - The Super User can view all mail packets within their RO and will be responsible for assigning packets to Basic Users at their RO. They are the final approver for Split and Unidentifiable Mail requests and second approver for Rescan requests. Super Users also have the ability to perform all the actions of a Basic User.

National User - The National User can view all mail packets across all ROs and will be responsible for the final approval of all Rescan requests. National Users also have the ability to perform all the actions of Basic Users and Super Users.

Access and Login

Slide 7 & 8

Handout 4

A user account is required to access the *CM Portal* system. An email notification will be sent to users providing a user name and password. That email will also provide a link/URL address for accessing the system. Upon accessing the specified URL, the Login page will be displayed. Enter the Username and Password assigned and select “Log On”.

First time login to the system will require users to change their password. The new password must be at least eight characters long, contain upper and lower case letters, at least one number and one special character.

Recover Password

Slide 9

Handout 4

If user forgets their password, click on “Forgot Password” link. The user will be required to enter their user name if password is needed. An email will be sent with the user name and/or password.

Home/Landing Page

Slide 10

Handout 4

Successful login will present the user with the Home/Landing Page. On this page you will find the “Help” and “Log Out” buttons. The “Help” button will present User with the Collybus User Manual. Log Out button will log the User out of the SMS Portal.

The Collybus Options are presented at the top left hand of the screen. These options will be described in greater detail later on.

User will also be presented with the Available Queues. These will also be described in greater detail later on.

Home Page Options

Slide 11

Handout 4

Options available at the top of the Home Page will vary by user permission. Currently three features are present.

- 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.

Search Function

Slide 12

Handout 5 & 6

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

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). Either ‘/’ 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.

After selecting a search from the dropdown, three additional options are available. Edit, Select Defaults, Counts

- 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.

Search Selections

Slide 13

Handout 6

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 these 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.

User View

Super User View

Users will have access to two queues.

Super Users will have access to five queues.

Slides 14 & 15

Handout 7

The total number of documents available for processing is listed to the right of each queue. The User and Super User may select the queue he/she wants to begin processing.

Home Page - Available Queues

Slide 16

Handout 7

Each workflow process queue, its function and access is explained below.

- Assignment Queue – mail packages that will be assigned to the User for processing (Super User access only)
- Authorization Queue - mail packages a User has returned for rescan or split which Super User will approve or deny (Super User access only)
- 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 (Super User access only)
- Work Queue – mail packages assigned to Users and pending processing

TOPIC 2: VIEWING MAIL IN THE CM PORTAL

INTRODUCTION

This topic will demonstrate to the trainee the process for viewing mail in the CM Portal and uploading to VBMS. It will also distinguish the Super User and User functions.

TIME REQUIRED

.50 hours

OBJECTIVES/ TEACHING POINTS

Topic objectives:

- 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 functions of the Super User and User, with 85% accuracy.
- Using the trainee handout packet and references, discuss the process for uploading mail to VBMS, with 85% accuracy.

The following topic teaching points support the topic objectives:

- Viewing Mail Package
- Actions and Tasks Buttons

Workflow Queue

Slide 17

Handout 8

Select the desired queue by placing a check mark in the box. To the right side of the screen, the work items waiting processing within the specific queue will be listed in a results grid.

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.

Workflow Queue

Sorting

Slide 18

Handout 9

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

Workflow Page

Actions

Handout 9

The following 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

Slide 20

Handout 10

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.

Workflow Page

Package Level Processing

Slide 21

Handout 10

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

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 VA or 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.

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.

Workflow Page

Actions & Tasks

Slide 22

Handout 11

As previously informed, the Actions buttons available on the Main Queue screen are also available on Workflow 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

To the right of the Actions Buttons are two Task buttons, which are only found within the mail package. 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.

Actions Buttons

Slide 23

Handout 11

This slide displays the pop up window when any of the Actions buttons are chosen.

The Re-Route pop-up window confirms that the user wants to send the package to the Re-Assign Queue.

The Hold pop-up window allows the user to free text a hold reason.

The Complete pop-up window confirms that the user wants to mark the package as complete.

The Assign pop-up window allows the Super User to select a User from the drop down menu to assign the mail package. The second drop down menu requires the Super User to select an instruction. The current choices include: Index Package and Index Document. It does not matter which is selected.

Index Button

Slide 24

Handout 12

Prior to completing a mail package (uploading package to VBMS or sending to Authorization Queue); a User must update the Index box.

The following field must be complete prior to uploading a package to VBMS. The Veteran File ID# which is the Veteran's Claim number as it appears in VBMS, the Veteran's First Name and the Veteran's Last Name. All other fields are optional.

Many of the fields in the pop-up window may be pre-populated. The user has the option to correct any pre-populated information or update any blank information. The information must be saved in order for the changes to take place.

Index Button

Emergent Claims

Slide 25

Handout 12

Included in the Index 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

Actions

Hold Queue

Slide 26

Handout 12

The Hold Queue contains the Return button. The Return button allows the user to remove the package from the Hold Queue and return the package back into the Work Queue.

A user can also utilize the Index button from the Hold Queue.

Actions Assignment Queue *Slide 27*	Only the Super User has access to this queue. The Super User has the option to assign, re-route, or work the mail packages from this queue. Assign allows the Super User to move the mail package to the Users Work Queue. Re-route allows the Super User to move the mail package to the Re-Assign Queue. A Super User can work the mail package from this queue and can utilize the Index and Complete buttons.
Actions Reassign Queue *Slide 28*	Only the Super User has access to this queue. The Super User has the option to route the mail packages to another RO from this queue. After selecting Route, a drop down menu will allow the Super User to select another RO. Indexing can also be completed from this queue.
Actions Authorization Queue *Slide 29* *Handout 13*	Only the Super User has access to this queue. The Super User has the option to approve or deny a request from a User who wants to have a mail package rescanned or split. If the Super User approves the request, the mail package will require additional approval by a COR user (Central Office staff). If the request is denied, the mail package will be returned to a User.
Workflow Page – Document Level Processing *Slide 30* *Handout 14*	The right side of the package view is the document status. Users can select any of the documents within the mail package to view and modify index values. Some index fields are restricted and cannot be edited by the user. Non-editable fields are highlighted in grey. The field that is editable by the user is Document Status. The user can modify the document status to one of the following: Complete – User will select this action if the work is completed and ready to upload to VBMS Re-Scan – User will select this action if the document is unable to be viewed and needs to be re-scanned Split – User will select this action if the document contains information for more than one Veteran and needs to be split 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

INTRODUCTION

This topic will discuss View Buttons and Tools

TIME REQUIRED

.25 hours

OBJECTIVES/ TEACHING POINTS

Topic objectives:

- Using the trainee handout packet and references, discuss the use of the View Buttons and Tools with 85% accuracy

The following topic teaching points support the topic objectives:

- Additional Functions
- Additional Information

View Buttons and Tools

These are the buttons and tools found on the Workflow Processing Page above the main document view:

Slide 31

Image Navigation
Rotating Images
Zoom
Brightness and Contrast

Handout 15

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 permanently change how the file is saved.

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):

Select this button to insert a document.

Replace Content (not currently active):

Select this 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 (not currently active):

Select this button to attach the file to an email.

View Buttons and Tools – Save or Print

Slide 32

Handout 16

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.

View Buttons & Tools – 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.
Slide 33	Previous notes can be viewed in the pop-up screen. New notes can be added by selecting “+”.
Handout 16	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	Date of claim – User is responsible for ensuring that claims establishment is based on earliest date stamp.
Slide 34	All actions (CESTing, Updating Systems, Updating Evidence, etc.) must be completed prior to uploading mail to VBMS.
Handout 17	Ensure that an eFolder exists prior to uploading materials to VBMS. If there is no eFolder the mail package will fail to upload and be returned to the assignment mail queue. If file exists at RO, make sure that file is transferred to the scanning site. Super Users with special permissions are able to access Reports through a separate SMS link. For more information about this feature, or to request access, please visit the OBPI-VCIP Centralized Mail page.
Misfiled and Misdirected Mail	This slide provides a visual on how to process misfiled or misdirected mail. This would include mail belonging to other business lines: PMC, Education, Voc Rehab, etc. Discuss the 7 steps outlined:
Slide 35 *Handout Attachment B*	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. Documents sent to appropriate business line via email (per SOP)
Questions	Allow time for questions. If there are any questions that cannot be answered or are not addressed in these training materials, submit them to the OBPI-VCIP Issue Tracker.
Slide 36	

PORTAL DEMONSTRATION AND PRACTICAL EXERCISE

TIME REQUIRED	1.5 hour
Demonstration	Instructor should login to the Portal. Display the different features and functions. Show the trainees the Super User and User functions and screens. Open a document work the mail with the group. Upload the mail to VBMS.
Hands On Training	Prior to hands on training, Instructor should ensure that Super Users and Users have mail in Portal. Have users log in to the Portal. Ensure everyone is able to successfully log in or have them sit with someone who is able to log in before further instruction. Additionally, have users login to VBMS and other legacy systems they use when processing mail (i.e., Share, COVERs, etc.). Next have the trainees open up a mail package. Super Users will review mail. Super Users should become familiar with assigning and reassigning mail packages. Users should analyze the document and determine necessary action. Have users perform necessary action and when completed, upload the documents to VBMS. Ask if there are any questions about the information presented in the exercise, and then proceed to the Review.

Lesson Review, Assessment, and Wrap-up

INTRODUCTION	The Centralized Mail (CM) Portal lesson is complete.
Discuss the following:	Review each lesson objective and ask the trainees for any questions or comments.
TIME REQUIRED	.25 hours
LESSON OBJECTIVES	You have completed the Centralized Mail (CM) Portal lesson. The trainee should be able to: • Describe procedures for accessing the CM Portal • Identify the general features and functions of the CM Portal • Discuss the process for viewing the mail in the CM Portal • Distinguish between the Super User and User functions • Describe how to upload mail from the CM Portal into VBMS
ASSESSMENT	Remind the trainees to complete the on-line assessment in TMS to receive credit for completion of the course. The assessment will allow the participants to demonstrate their understanding of the information presented in this lesson.