CENTRALIZED MAIL (CM) PORTAL TRAINING - CACI
INSTRUCTOR LESSON PLAN
TIME REQUIRED: 3 HOURS

Table of Contents

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 #   3878420

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, Duplicate C (DUPC) Files and Folder Establishment and Introduction to Appeals and VACOLS.

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 Guide
- 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
- Entrust/CACI Token

| **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 CACI 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

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:

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

LESSON OBJECTIVES

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:

Slide 2

The CA will be able to:

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 Basic 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 (ROs). 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.

- Veteran's claim was received 7/27/12 as shown by VA Form 21-0820, but 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	Explain where these references are located in the workplace.

- CM Portal User Guide

Slide 3
- CM Portal SOP

Handout 2

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	.5 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.
- Using the trainee handout packet and references, differentiate the functions of the Super User and Basic User, with 85% accuracy.

The following topic teaching points support the topic objectives:

- Access and Login
- Features and Functions of the CM Portal
- Defining Roles

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 ICP for reviewing mail, transferring mail and uploading mail into VBMS. Mail will be analyzed online versus paper.

Features and Functions

Slide 5

An overview on following topics will be discussed in detail:

- Defining Roles - Basic User, Super User and National User
- Accessing the Centralized Mail Portal
- Logging into the Centralized Mail Portal
- Using the Home Page
- Filtering the Home Page
- Assigning a Mail Packet
- Reviewing a Mail Packet
- Uploading a Mail Packet into VBMS

Defining Roles *Slide 6* *Handout 3*	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 to clear exceptions in order to upload the mail packet into VBMS, reassign packet from one office to another, and submit packets for Download, Rescan, Split, or 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 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.
Accessing the Centralized Mail Portal *Slide 7* *Handout 3*	A user account and Entrust/CACI Token is required to access the *CM Portal* system. An email notification will be sent to users providing a Username and Personal Verification Number (PVN). 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. Note: If the User has issues logging in, ask them to clear their Internet Explorer cache. Additionally, be sure the browser is set to the most recent Internet Explorer version and not in Compatibility View. You can check browser settings by selecting F12. If a user forgets their password, contact omegahelp@caci.com as found on the login page.
Logging into the Centralized Mail Portal *Slides 8, 9 & 10* *Handout 3*	The Login page will be displayed. User must enter the User Name provided and select Continue. User will then advance to the Username Token PVN Authentication page. This page will require the User to enter the four digit PVN created. User will also be required to enter the Token Dynamic Password which will appear when you press the button on your assigned Token. If successful, the User will advance to the confirmation screen. On the confirmation screen, user must select Continue.

Home Page *Slide 11* *Handout 4 & 5*	Successful login will present the user with the Home Page. The page is comprised of twelve identification items.

1. **Page Navigation** – Allows the user to move to the first, previous, specific page, next, or last page of the Packet Lists.

2. **Refresh Page** - Resets the page back to the original view (will save any filters selected).

3. **Filter** - Narrows packet list by the selected field, e.g., Regional office, exception types, assignees, Veteran name/file number, and allows User to designate number of packets to list per page. Discussed in greater detail on following slides.

4. **Assign** - Allows Super User to assign specific packets to a User. Discussed in greater detail on following slides.

5. **Page Display Count -** Shows current range of packets and the total number of packets.

6. **Column Headers -** Identifies packet metadata (fields) and can be sorted or reconfigured to show desired fields. Discussed in greater detail on following slides.

7. **Document Rows** - Reflects available packets in queue. The row is presented based on time in queue and whether they have been opened by you as follows**:**
   - Bold red – older than one week that have not been opened by you
   - Red – older than one week that have been opened by you
   - Bold black – younger than one week that have not been opened by you
   - Black – younger than one week that have been opened by you
   - Green italic – work that has been completed in the last 90 days, with the exception of Downloads which will appear indefinitely, and Unidentifiable Mail which will appear for one year

8. **Selection Checkbox -** Used to select all or specific packets to be assigned.

9. **Functions Icons -** Quick access to the CMP Queue/packet list page (Home Page). Select Upload to add PDFs or TIFF documents to the tracker application page. Select Reports to

access the report module

10. Sign-Out - Exit link to logout of the application.

11. Contains Trigger Docs – displays an indicator showing all trigger (action needed) documents in the mail packet. Trigger documents are defined as one of the following:

- VA Form 21-526 (526EZ, 526b, 526c, etc.)
- VA Form 21-4138
- Non-Rating CESTs (VA Form 21-686c, 674, 674b, etc.)
- VA Form 27-0820
- VA Form 21-4142

12. **Applied Filters** for RO and Solicited Queue - Indicators next to the assign button tell a user the current RO and solicited queue they are currently viewing.

Home Page Reports	Super Users with the reports permission have access to generate a report of work processed at their RO. The Reports button located on the Home Page will be available if the Super User has access.
Slide 12 *Handout 6*	Select the Repots button, then select User Work Processed RO. Enter the date or date range of the report you would like to generate, and select Get Report. The Report will open in Excel and will display daily work assigned, reassigned, and processed by each user at the RO.
Home Page Column Headers *Slide 13* *Handout 6*	There are 14 Column Headers on the Home Page. Column Headers can be rearranged or hidden based on User preference. Except for "Complete Date" and "Date Assigned", all other headers will appear upon accessing the system. "Complete Date" and "Date Assigned" are optional and will only show up if the User manually checks the box(es) under column selection. Below are the header names and definitions. Hovering over each column header in the queue will give a brief description of that column. - **Regional Office** – Identifies the specific RO associated with mail packet - **CMT ID** – Unique identifier number assigned by Portal Vendor (not PII) - **Date of Portal Entry** – Identifies date mail packet uploaded to portal - **VA Receipt Date** – Identifies Date of Claim (Date Stamp) - **Complete Date** – Identifies Date mail packet uploaded to VBMS,

downloaded or approved for rescan or split (optional column)
- **File Number** – Identifies Veteran's file number
- **Last Name –** Identifies Veteran's last name
- **First Name –** Identifies Veteran's first name
- **Contains Trigger Docs** – Displays an indicator showing if actionable document exists in packet
- **Doc Type Contained** – Displays which actionable documents exist in packet
- **Assignee** – Identifies the individual the mail packet is assigned to
- **Date Assigned** – Identifies date mail packet assigned to specific individual (optional column)
- **Resolution** – Identifies current status of the packet in the portal
- **Emergent –** Identifies emergent issues

Home Page

Column Features

Slide 14

Handout 6, 7

Columns can be sorted and displayed depending on user preference. Each column can be sorted in ascending or descending order by selecting the column and choosing the sort preference. User can also choose to filter by specific column.

Columns can also be hidden by selecting the dropdown on the column and removing the check mark next to the undesired column. To have access to the column again, simply place a check mark in the box.

To view the columns in a different order, select a column and drag and drop it to the desired location.

User also has the ability to filter within each column.

Column preferences will be saved for the duration of the login session.

Home Page

Column Filters

Slide 15

Handout 7

Allows the user to filter within the CMP Queue by clicking on any of the individual column headers.

If a user wants to filter by a specific Veteran last name, user would go to the header "Last Name" and click on the header. A drop down menu appears. Select "Filters", in the box type in the last name of the Veteran. All Veterans with that specific name in the CMP Queue will filter.

To filter for specific document types, in the filters selection, you would type in the form number. All documents identified as 526 will filter.

Filtering *Slide 16* *Handout 7*	Users and Super Users have the ability to filter on the packet lists page to quickly identify packets. The filter button located at the top of the Packet List page contains several options which can be used together to quickly identify a packet you may be searching for. Select the filter button, fill out the filtering criteria and select the filter button to execute. If you would like to start your filter over, select the "Reset" button and the filter will reset. Filtering options and their descriptions are below: • Regional Office (only National Users can access this) • Solicited? • Emergent • Exception Type • Assignee • Resolution • Find By • Page Size The following slides describe each filter option.
Filtering – Solicited? *Slide 17* *Handout 8*	Mail will be categorized as either solicited or unsolicited. Solicited mail will be mail VA specifically requested while unsolicited will be any other mail sent. Solicited filtering options include: • All • Solicited • Unsolicited
Filtering – Emergent *Slide 18* *Handout 8*	The emergent column will display any of the emergent statuses associated with that record. Users will be able to add one or more emergent values with a record in the packet detail screen. **Emergent filtering options include:** • Select all emergents – **All** • Terminally ill claimants – **TERM** • Veterans that were seriously injured in service and are not receiving benefits – **SERW** • Claimants that are suffering from extreme financial hardship – **FINH** • Prisoner of War and their survivors – **FPOW** • Homeless Veterans – **HOME** • Suicidal Claims – **SUIC**

Filtering – **Exception Type** *Slide 19*	The portal was designed with the end goal of Auto-CEST in mind, so the Exception Types refer to reasons why the packet was unable to Auto-CEST. Since Auto-CEST is not currently active, all packets will have an Exception Type assigned by the scanning vendor. All Exceptions need to be Cleared by the Basic User working the packet before upload to VBMS can occur.
Handout 8	Exception Type filtering allows both the Basic User and Super User to filter by specific Exception Type. Exception Type selections include:

- Cannot Identify Veteran in VBA System
- Claims establishment document type, Missing Data- cannot submit document for automatic claims establishment
- Claims establishment document type, All required data available, failed to auto-establish
- Upload to CMS failed
- Missing Information, Veteran Name and/or File ID cannot be automatically captured
- Other

Filtering – Assignee *Slide 20* *Handout 9*	Only the Super User may filter through the Assignee option. Filtering through this method will provide the Super User the list view for the following selections:

- Assigned – All mail packets assigned
- Unassigned – All mail packets not yet assigned
- All – Mail packets in any assignment status
- Specific Assignee – can select from list of assignees at the RO

Filtering – Resolution *Slide 21* *Handout 9*	This option will allow the Basic User and Super User to filter on specific resolution including:

- All

- Resolved (packets that have been completed – will display packets that are up to 90 days past the completion date)

- Unresolved (**Default selection** – packets that have not been worked and require action)

- Upload (mail packet has been sent for upload to VBMS and will appear in the queue in green italic font to indicate packet is complete)

- Cleared (all Exceptions have been cleared but packet has not been sent for upload to VBMS)

- Exception (exceptions exist which must be Cleared before upload to VBMS can occur)

- Download Pending (Basic User has requested a Download to remove the packet from the portal to work in the paper environment and still needs Super User approval)

- Download Confirmed (Super User has approved the request to Download and will appear in the queue indefinitely in green italic font to indicate packet is complete)

- Rescan Pending RO (Basic User has requested a Rescan to send an unreadable document through scanning again and still needs Super User and National User approval)

- Rescan Pending Final (Super User has approved the request for Rescan and still needs National User approval)

- Rescan Confirmed (National User has approved the request for Rescan and will appear in the queue in green italic font to indicate packet is complete)

- Split Pending (Basic User has requested a Split of documents that should not be uploaded together (such as two Veterans co-mingled) and still needs Super User approval)

- Split Confirmed (Super User has approved the request for Split and the packet is being sent back for re-upload as separate packets)

- Failed to Upload (the packet has failed to upload three times and additional action is needed for upload to VBMS to occur)

- UM Pending (Basic User has marked the packet as Unidentifiable Mail)

- UM Confirmed (Super User has approved the packet as Unidentifiable Mail and will appear in the queue in green italic font for one year)

Filtering – Find By

Slide 22

Handout 10

This filter option contains several metadata fields for searching Veteran information. They include:

- File Number
- Last Name
- First Name
- Middle Initial
- CMT ID

13

Filtering – Page Size	Filtering by page size allows the Basic User or Super User to adjust the number of packets displayed in the packet list. Options include:
Slide 23	• 20 • 40 • 60
Handout 10	• 80 • 100

Home Page	The Basic User and Super User Home Page views will slightly differ.
Super User View	The Super User view will include the Assign option as they are responsible for assigning packets to Basic Users.
Slide 24	The Super User view will display all mail packets assigned to the RO and show whom it is assigned to. Assignee column will be blank if the packet has not been assigned to anyone.
Handout 10	
	The Super User display of available packets will show how many packets are in the portal for the entire RO.

Assigning a Mail Packet	When a packet enters the portal, it will automatically be assigned to the RO identified during processing. The Super User must assign each mail packet manually.
Data Grid Assign Option – Selecting Packets (Super User)	There are two steps required when assigning a packet.
	First, on the packet data grid, the Super User has the option to assign a single mail packet, multiple packets, or all available mail packets at one time. To select one packet at a time, mark a check in the specific box on the left. To select more than one packet for assignment, check as many boxes as desired. To select all available packets in the grid, select the top checkbox and it will mark a check in all packets.
Slide 25	
Handout 10	

Assigning a Mail Packet	Next, the Super User must selected the Assign button located on the top menu bar. A pop up screen will appear. Next to "Assign to," a drop down menu will be available. The Super User will be able to select an assignee from the list of all Basic Users at the RO.
Selecting Assignee, Packet View Assign Option	
	The Super User may add a Comment. This is an optional field. Comments cannot be edited or deleted and will stay in the portal as long as the mail packet is there. Comments do not upload to VBMS.
Slide 26	
Handout 11	Finally, the Super User must select the Assign button at the bottom of the pop up screen to complete the process.

The Close button will take you out of the assign screen without saving comments and bring you back to the main page.

Note: The Super User has to option to Reassign a mail packet from one Basic User's queue to another if the workload or other circumstance require them to do so.

TOPIC 2: VIEWING AND UPLOADING MAIL IN THE CM PORTAL

INTRODUCTION

This topic will demonstrate to the trainee the process for viewing mail in the CM Portal and uploading mail to VBMS.

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, discuss the process for uploading mail to VBMS, with 85% accuracy.

The following topic teaching points support the topic objectives:

- Viewing Mail Packet
- Uploading Mail Packet into VBMS

Home Page

The Basic User and Super User Home Page views will slightly differ.

Basic User View

The Basic User View will only display mail packets assigned to them.

Slide 27

The Basic User display of available packets will show how many packets are assigned to them.

The Basic User is primarily responsible for reviewing the mail packets. The Basic User may only review mail packets specifically assigned to them.

To view the mail packet, the user will select (double-click) the desired row.

Reviewing a Mail Packet *Slide 28* *Handout 12, 13*	The screen that displays after selecting the mail packet is identified as the Packet Details. There are eight main parts to this screen. 1. Packet Menu Bar – Users can access the Actions menu, Upload, Save updated details or Cancel changes for the current packet. 2. View Tabs – Toggle between Details (shown) or Comments (containing view-only notes about the packet). 3. Packet Detail – Contains the Regional office drop down menu field to show the assigned RO and Receipt date field which tracks the date the packet was received. Includes Completed Date after the packet has been worked. Shows information about the selected Veteran; File number, Last name, First name, and Middle initial. 4. Documents – Lists the documents contained in the packet. 5. Document Detail – Shows information about the selected document; Document ID, Document type, Page count, Exceptions, and Contentions. 6. Actions Menu – Request or Confirm Download, Rescan, Split, or Unidentifiable Mail 7. Image View – Page view of the document (does not appear until a document is selected). 8. Exceptions – Shows which exceptions exist for the current document. 9. Assignee - User can select Edit to assign the record to another user. By taking this action, the record is automatically saved. The following slides will discuss each section in detail.
Reviewing a Mail Packet Documents Grid *Slide 29* *Handout 13*	The Documents grid shows all the documents received in the mail packet. Each row is a different type of document for the same Veteran. The Doc ID column is not relevant to VBA users, but is used by the scanning vendor. The Doc Type provides what the document is. The Exceptions column shows which Exceptions exist for each document. If the Exceptions have been cleared, this field will be blank. The columns in the Documents Grid can be rearranged just like the columns on the Home Page, with the User determining which columns are viewable and using the drag and drop feature to rearrange the

columns.

Users need to select each document row to view all documents in the mail packet.

Reviewing a Mail Packet Image View *Slide 30* *Handout 13*	Upon selecting a document from the Documents grid, the user is now able to view the document. The Document Detail fields will populate with information included by the scanning vendor. Document Details will be discussed further on the following slides. Portable Document Format (PDF) navigation tools will appear at the top of the document.
Reviewing a Mail Packet Details and Comments *Slide 31* *Handout 13, 14*	The Details tab shows which RO the mail packet is assigned to, and the date the mail packet was received. The receipt date is entered by the scanning vendor and cannot be edited in the portal. The completed date is populated after the packet has been worked and cannot be edited in the portal. Super Users and Users both have the ability to update the Assignee status. From this screen the mail packet can be assigned to another User or Super User within RO. Click on the edit button and from the Assign to drop down menu select the individual the mail packet will be transferred to. A comment is not required. Click on assign and the mail packet will immediately be reassigned to selected individual. All users have the ability to update the Regional Office field to reassign work to another RO. When mail is received which belongs to another jurisdiction, users can route the mail using the dropdown and selecting the correct RO. After the RO has been selected, a pop-up will appear in which the Super User can enter comments which are viewable by the receiving RO. The user will then select Reassign to complete the transfer, or Cancel to close out and keep the packet at the current location. The File Number will not be populated by the scanning vendor, but must be entered by the user. **The File Number should not contain any spaces or dashes.** The Last Name and First Name may be populated by the scanning vendor; if it is not, it must be entered by the user. **The File Number, Last Name, and First Name are the data fields which VBMS pulls from when uploading. These fields must be correctly entered by the user and needs to match VBMS in order**

for upload to occur. If these fields are not completed, upload to VBMS will be unsuccessful, and the mail packet will returned to the assignment queue for rework.

The Emergents field allows the User to attach any emergent status associated with the record.

There is a checkbox stating "I have fully reviewed this package" on each packet which must be checked before upload to VBMS can occur.

The Comments tab shows all comments created by Super Users when assigning mail to Basic Users or to other ROs. Any user can also add a comment in this tab. There is an indicator to show how many comments exist for that packet. Comments cannot be edited or deleted and will stay in the portal as long as the mail packet is there. Comments do not upload to VBMS. If a packet fails to upload to VBMS, a Comment will be automatically added providing a reason for the failure to upload.

Reviewing a Mail Packet Emergent *Slide 32* *Handout 14*	The Emergent field allows that user to associate one or more emergent values to a claim. From the drop down selection, the following options appear: - Terminally ill claimants – **TERM** - Veterans that were seriously injured in service and are not receiving benefits – **SERW** - Claimants that are suffering from extreme financial hardship – **FINH** - Prisoner of War and their survivors – **FPOW** - Homeless Veterans – **HOME** - Suicidal Claims – **SUIC** User may select one or more options. The user may also delete an emergent association by selecting the "X" next to the emergent selection.

Reviewing a Mail Packet Document Details and Clearing Exceptions *Slide 33* *Handout 15*	The Document ID is populated by the scanning vendor and cannot be edited. The Document Type is populated by the scanning vendor and cannot be edited. The Page Count provides how many pages exist for the selected document. The Exceptions dropdown shows which exceptions exist for each document. After reviewing the document and completing the appropriate action in VA systems, the exception needs to be Cleared. All exceptions must be cleared from each document before attempting to upload to VBMS. Note: When the "I have fully reviewed this Package" checkbox is selected in the Package Detail section, all Exceptions are automatically cleared. The Contentions fields may list contentions populated by the scanning vendor. These fields are not read by VBMS and do not take the place of the employee completing a full review of the mail packet. Users can update these fields but are not required to do so. **The Contentions fields should not contain any special characters, such as an ampersand (&).**
Reviewing a Mail Packet Packet Menu Bar *Slide 34* *Handout 15*	The Packet Menu Bar allows the user to complete action for the current packet. The following buttons are available: - Actions - Upload - Save - Back/Cancel Each will be discussed in detail.
Reviewing a Mail Packet Packet Menu Bar – Upload, Save, and Back/Cancel *Slide 35* *Handout 15*	The Upload tab on the Packet Menu bar allows the User to upload mail packet to VBMS. This will be the final button selected before the packet is removed from the queue and sent for upload. If packet details have not been populated, or the packet has not been checked as reviewed, or Exceptions still exist which have not been Cleared, a pop-up will appear which notifies the user that the action must be taken. The Save tab will save any changes the User has made on the screen, but will not send for upload to VBMS. The Back/Cancel tab will close out of the mail packet and will not save any changes or send for upload to VBMS.

Reviewing a Mail Packet Packet Menu Bar – Actions Tab *Slide 36* *Handout 16* *Repeat the scenarios of Download, Rescan, and Split requests*	If the mail packet cannot or should not be worked in the portal, the Actions tab on the Packet Menu bar allows the Basic User and Super User to request or confirm Download, Rescan, Split, and Unidentifiable Mail packets. The Basic User has the option to Download or Split. They will select from the dropdown menu as appropriate. A Basic User can request a Rescan or Unidentifiable Mail. The Super User has the option to confirm or deny requests for Rescan or Unidentifiable Mail. Super Users can also submit requests for these actions. They will select from the dropdown menu as appropriate. Rescan requests require approval from a National User. To email a single document to the appropriate business line from a downloaded packet, select the envelope icon, then choose "Send Copy." Make sure your email is sent encrypted. To email multiple documents from a downloaded packet, they must be saved individually using Internet Explorer "File," then "Save As." Save as many documents as needed, and then include them as attachments to the email. Make sure your email is sent encrypted.
Uploading Mail Packet to VBMS **Upload** *Slide 37* *Handout 16*	After the Veteran's file number, first name, and last name have been entered in the Packet Details section, the "fully reviewed" check box has been checked, and all Exceptions have been Cleared, the mail packet is ready for upload to VBMS. Select Upload at the Packet Menu Bar to send the mail packet to VBMS. Note: completed work will appear in the queue in green italic font for 90 days after it has been completed.
Additional Information *Slide 38* *Handout 16*	Reminders: All actions (CESTing, updating systems, updating evidence, etc.) must be completed prior to uploading mail to VBMS. If a paper 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. If an eFolder does not exist, one must be created.

Misfiled and Misdirected Mail *Slide 39* *Handout 17*	The 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: 1. Veteran 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
Questions *Slide 40*	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.

PORTAL DEMONSTRATION AND PRACTICAL EXERCISE

TIME REQUIRED   1.5 hours

Demonstration   Instructor should log in to the Portal. Display the different features and functions. Show the employees the Basic User and Super User functions and screens. Open a document and work the mail with the group. Upload the mail to VBMS.

Hands On Training   Prior to hands on training, the Instructor should ensure that Basic Users and Super 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 log in to VBMS and other legacy systems they use when processing mail (i.e., Share, COVERs, etc.).

Next have the employees open up a mail packet.

Super Users will review mail. Super Users should become familiar with assigning and reassigning mail packets.

Basic Users should analyze the document and determine necessary action. Have user 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.

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 Basic 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.