VA Central Mail Tracker

User Guide

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Revision History Sheet

REVISIONS TO VA Central Mail Tracker User Guide

The **VA CENTRAL MAIL TRACKER USER GUIDE** is revised as needed to accommodate substantive content updates or new developments in system design modification, which were not anticipated at the time the manual became effective.

The date found on the manual's footer is the date the manual was last modified. The revision date and corresponding page numbers where the revisions were implemented will be noted on the Revision History sheet under "Date" and "Page(s) Revised".

The revision date and page number will only be noted if substantive changes are made to a given page. The revision date and page number will not be recorded if a manual's page is altered due to spacing or formatting changes.

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-- REVISION HISTORY –

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I. INTRODUCTION

The VA Central Mail Tracker (VACMT) application provides the VA a web-based tool to view, update and clear exceptions identified in mail processing.

The VACMT application allows the VA to view, update and clear exceptions related to packages received in mail processing. Once a package has made it through the workflow, it will be uploaded to VBMS. Described at a very high level, the mail exception handling process using the VACMT application will include steps outlined here (*Figure 1*).
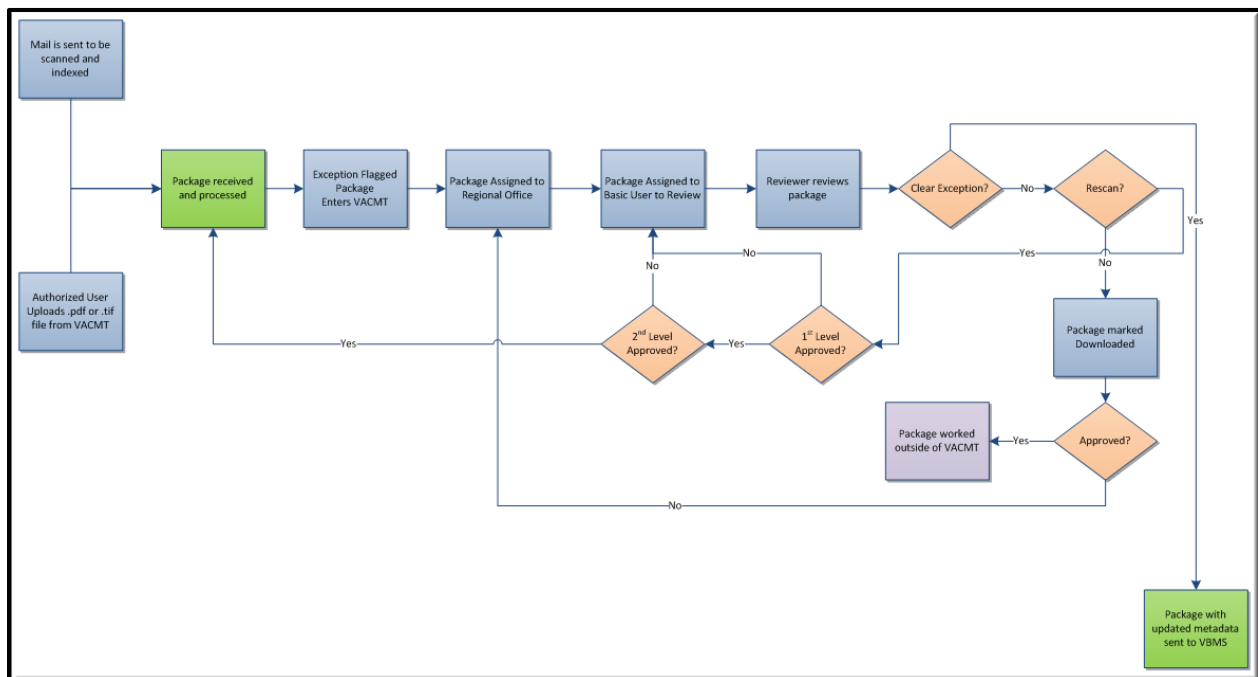

Figure 1 – Mail Exception Handling Process

II. USER ROLES

The VACMT application supports three main types of users of the application: a Basic User to review packages; a Super User to assign packages; and a National User with access across all regional offices.

Basic User
Upon login Basic users will view all packages assigned to them within the Regional Office (RO) to which they are assigned. Their primary role will be to review packages, clear exceptions, mark packages "downloaded" and/or mark packages "rescan".

Super User
The primary role of a Super User will be to assign packages to Basic Users for review, verify packages marked "downloaded", perform first level confirmation of packages marked "rescan" and reassign packages to different Regional Offices, if applicable. Super Users have the ability to perform all of the actions of a Basic User.

National User
The primary role of a National User will be to access and monitor VACMT related reports and have the ability to view all packages across all Regional Offices in the application. Additionally, some National Users will be granted special permission to perform the final confirmation for packages marked "rescan". National Users have the ability to perform all of the actions of a Super User and Basic User.

III. LOGGING IN

Authorized users are provided an Entrust token and must create a Personal Verification Number (PVN) prior to logging into the VACMT application. These users can access the VACMT application directly using the following URL: https://vacmt.omega-caci.com/

Once on this page, users must first enter their username and ensure the Authentication Method selection is "Token/Multi-factor Authentication", then click *Continue.* (*Figure 2*)

Figure 2 – Login Screen 1

Next, at Enter Current PVN, type the 4-digit PIN. At Enter Token Dynamic Password, type the 8-digit number generated from assigned the Entrust. Once entered users must click the *Continue* button to login *(Figure 3)*. To acquire the dynamic password users must press and hold the button on the Entrust token and the eight digit dynamic password displays. If users need to change the PVN, click the *ChangePvn* button to enter and confirm the new PVN and then click *Continue*.

Figure 3 – Login Screen 2 with and without changing the PVN

Lastly, the confirmation screen will appear along with the last successful login and last unsuccessful login information. To enter the application users must click the *Continue* button at the bottom of this message *(Figure 4)*.
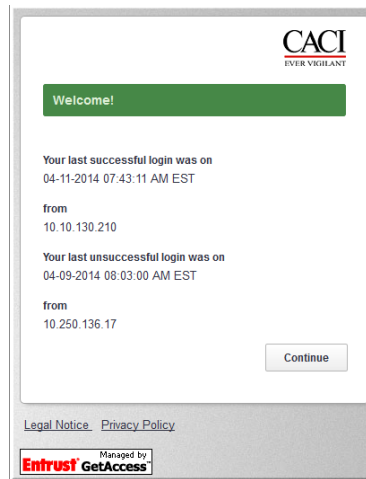

Figure 4 – Login Screen 3

IV. ASSIGNING A PACKAGE

As packages enter the VACMT application, they will be automatically assigned to the Regional Office identified during the scanning/indexing process based on the zip code of origin. Super Users will assign these packages to Basic Users for review and exception processing. Super Users will also have the ability to reassign a package to a separate Regional Office if it does not belong to their respective office.

Assigning Packages to Basic Users

When a package enters the VACMT application, it will automatically be assigned to the Regional Office identified during processing. Each package must be manually assigned to a Basic User by either a Super User or National User before the Basic User will be able to review them. Below are the steps to follow to assign a package to a Basic User.

1. Login to the VACMT application.

    - *Notice the packages which appear in the datagrid are assigned to the Regional Office of the Super User logged in.*

2. Ensure you are on the CMP Queue main menu option.

3. Click the filters button located on the top menu bar.

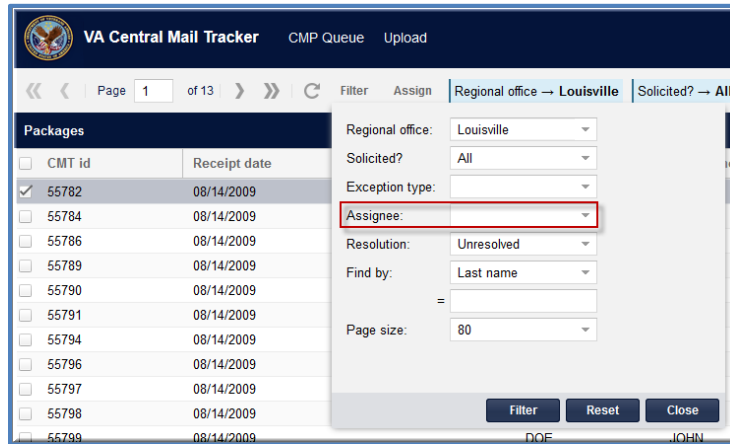4. Select the Assignee filter option. *(Figure 5)*

Figure 5 – Assignee Filter

5. Select the "unassigned" option in the dropdown.

6. Click the *Filter* button located at the bottom of the filter screen.

   - *Notice the packages which appear in the datagrid are all unassigned packages for the respective regional office. Users may also refine their selection by using additional filtering options prior to assigning.*

   - *By default, the Resolution filter is set to Unresolved so users only see packages that are unresolved and require action. Please refer to the filtering section of the user guide for more information.*

7. Select 1 or many of the checkboxes to the left of each package you wish to assign. *(Figure 6)*

   - *You may also select the checkbox at the top of the datagrid to select all packages.*

Figure 6 – Select Packages

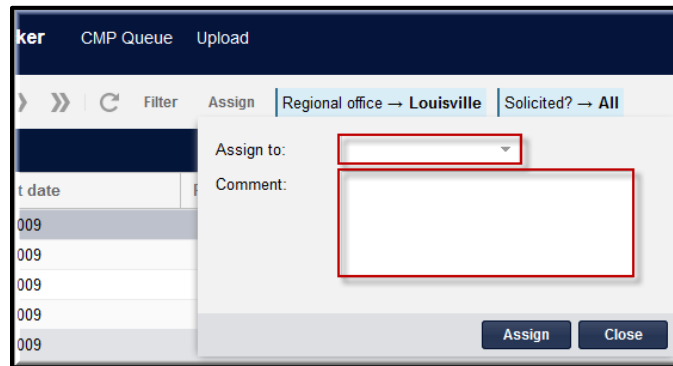8. Select the *Assign* button located on the top menu bar. *(Figure 7)*

Figure 7 – Assigning

9. Select the dropdown menu to view a list of all potiential Basic Users assigned to your respective Regional Office.

10. Select the Basic User you wish to assign.

11. Add a comment to the Basic User (optional). The comment will be viewable within each package detail assigned.

12. Select the *Assign* button to complete the process.

Reassigning Packages to Basic Users

Super Users and National users also have the ability to reassign a package to a different Basic User if the workload or circumstances require them to do so. Below are the steps to follow to reassign a package to a different Basic User.

1. Repeat Steps 1 – 8 of the *Assigning Packages to Basic Users* section of the user guide.

2. Select the Basic User you wish to re-assign.

3. Add a comment to the Basic User (optional). The comment will be viewable within each package detail assigned.

4. Select the *Assign* button to complete the process.

Reassigning Packages to a Different Regional Office

There may come a time when the Regional Office assigned to a package during scanning/indexing is incorrect. If this occurs Super Users and National Users will have the ability to reassign the package to the appropriate Regional Office. Below are the steps to follow to reassign a package to a different Regional Office.

1. Login to the VACMT application

2. Ensure you are on the CMP Queue main menu option.

3. Locate the package you wish to reassign using the filtering capabilities in the top menu bar.

   - *Please refer to the filtering section of the user guide for more information.*

4. Double click on the package you wish to reassign on the datagrid.

5. You are now on the Package Detail page. Select the Regional Office dropdown menu to view the list of potiential Regional Offices to be assigned.

6. Select the new Regional Office you wish to assign the package to. *(Figure 8)*
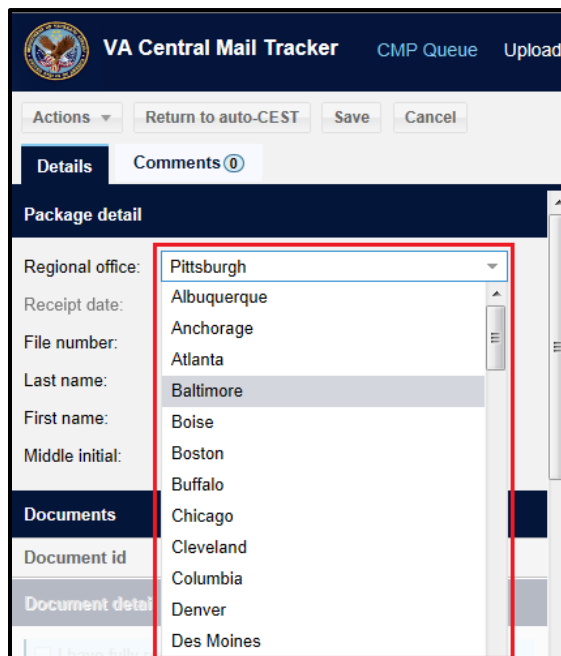

Figure 8 – Re-assigning ROs

7. A modal window will appear along with a message that states *"You elected to reassign this package to a different RO. All previously unsaved changes will be lost. Once reassigned you will exit this package detail page and return to the package list page."*

8. Enter a comment explaining why the package is being reassinged to the new Regional Office. *(Figure 9)*
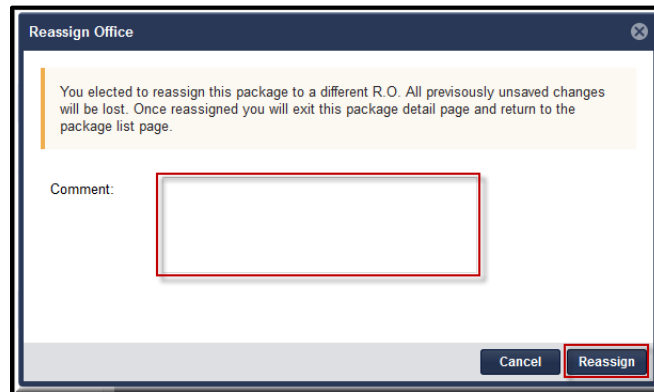

Figure 9 – Re-assigning ROs Comment

9. Select the *Reassign* button at the bottom of the modal window to complete the process.

- *The package is now reassigned and you are taken back to the Package List page.*

V.   REVIEWING A PACKAGE

Reviewing packages is a primary responsibility of a Basic User. Basic Users may begin the review of packages once a Super User or National User has assigned packages to them. When reviewing packages, Basic Users compare the data captured during the scanning/indexing process against the images produced during the same process. Super Users and National Users may also perform a review if necessary.

Reviewing Packages – Cleared Exceptions

Reviewing packages is a primary responsibility of a Basic User. Basic Users may begin the review once a Super User or National User has assigned them packages. If a Basic User can address the exception(s) for a package to allow the documents to upload to VBMS, they will mark the respective package cleared and send it back for Auto-CEST (Note that until Auto-CEST is rolled out in VBMS, the Basic User may need to CEST the package). Below are the steps to follow for a Basic User to clear exceptions assigned to packages.

1. Login to the VACMT application.

2. Ensure you are on the CMP Queue main menu option.

- *The Package List page will display including a list of packages that still need to be worked in the VACMT application, sorted with the oldest packages using the receipt date at the top.*

2. Double-click on the first package in the list. *(Figure 10)*This will take you to the package detail for the respective package.

- *Once in the package detail there are several items to review. The left panel contains the package level information at the top including the current regional office assigned, package receipt date, and fields to enter the file number, last name, first name, and middle initial.*

- *Below the package detail is a small datagrid with a list of documents in the respective package. The column defaults for this Documents grid are Document ID and Exceptions.*

Figure 10 – Package List

- *Additional columns within the datagrid are available by selecting the down arrow within a column heading > columns > check the columns to be displayed > uncheck columns to be hidden. It is recommended to keep the number of columns selected to four or less. (Figure 11)*

Figure 11 – Package List Column Features

- *You may also drag and drop the columns to the position you desire. The columns will remain in the position you last left them for the life of your session. If you logout/login the columns will be restored to their original position.*

3. Navigate to the document list datagrid and sort by the exception column to bring the documents containing exceptions to the top.

4. Select the first document in the list containing an exception to view the package detail. *(Figure 12)*
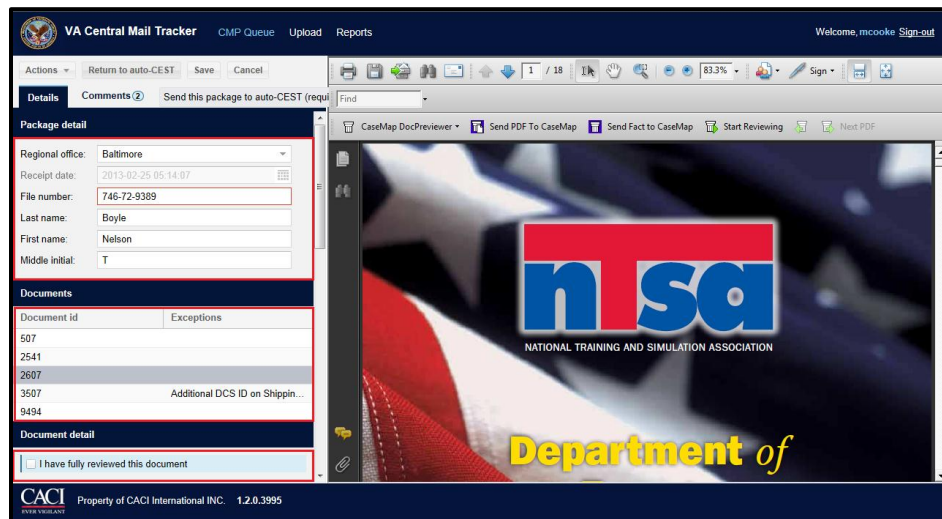
Figure 12 – Package Detail

- *After selecting a row in the document list, the image of the document will appear to the right and the respective metadata will display in the section below the document list. The metadata caputred for each document includes:*

    - *Document ID – Not editable*
    - *Document Type*
    - *List of exceptions identified*
    - *Page Count – Not editable*
    - *Contentions (when applicable)*

5. Review and correct the metadata populated when compared to the image displayed on the right. Some exceptions will require actions to be taken in other VA systems.

    - *The File Number, Last Name, First Name, and Middle Initial fields are now displayed under Package Detail and only need to be entered once.*

    - *File Number is restricted to 9 digits but will allow an 'X' at the end to indicate a deceased veteran.*

    - *Middle Initial is restricted to one (1) character.*

6. Once all of the missing data elements have been corrected which address the respective exception listed at the bottom of the document, click the clear button next to the exception listed.

7. At Document detail, click the checkbox next to *I have fully reviewed this document.*

8. Click the *Save* button at the top of the package.

9. Repeat steps 5 - 8 for each exception listed, for each document in the package until all exceptions have been cleared for the entire package.

- *You may view the document list exception column to confirm all exception are cleared. When the column is blank, all exceptions have been cleared.*

- ***Once all exceptions have been cleared, all of the mandatory fields have been populated (FileNumber, First Name, Last Name) and you have reviewed each document in the respecitve package,*** *you will be ready to return the package for Auto-CEST and upload into the VBMS system.*

10. Click the *Return to auto-CEST* button to complete the review process. *(Figure 13)*

- *Once selected, the package will be updated with a resolution of "Auto_CEST" and the Basic User will return to the Package List page.*

- ***NOTE: The application will perform a validation to ensure all exceptions have been cleared, mandatory fields are populated (FileNumber, First Name, Last Name), and you have reviewed each document in the respecitve package. If the package does not meet all criteria a warning message will appear with the missing information and will prevent the user from marking* Return to auto-CEST. *Also, be aware that any spaces before or after data in the FileNumber, First Name, and Last Name fields are removed automatically by the system when clicking* Return to auto-CEST. *This avoids issues when uploading documents to VBMS*.**
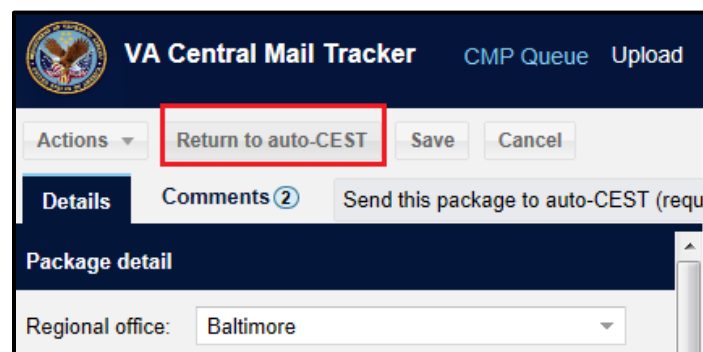

Figure 13 – Return to Auto-CEST

Reviewing Packages – Downloaded

There may be scenarios where a document should not be uploaded to VBMS.   For scenarios like these, the User may elect to mark the package "Downloaded" and resolve the package outside of the VACMT application. This designation requires an additional approval from a Super User or

National User to confirm. Below are the steps to follow for a Basic User to mark a package "Downloaded".

1. Execute the steps 1-8 outlined in the *Reviewing Packages – Cleared Exceptions* section of the user guide.

   - *If at step 8 you have a package that contains one or more exceptions that cannot be cleared **and** the image quality is clear enough for review you can mark the package "Downloaded".*

   - *Follow the external procedure for handling packages marked "Downloaded".*

2. Select the *Actions* button at the top of the left panel.

3. Select the submenu items *Download > Downloaded. (Figure 14)*

   - *Once selected the package will be updated with a resolution of "Download_pending" and the Basic User will return to the Package List page. The package must be confirmed by a Super User or National User for the package to complete the download process in the VACMT application.*
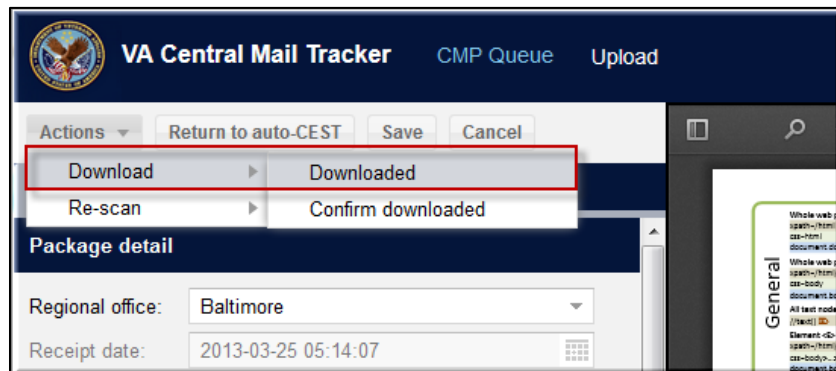
Figure 14 – Downloaded

Reviewing Packages – Rescan

There may be a scenario where a package contains images that are unreadable (examples: paper folded in half during scan or scan quality extremly poor). Packages marked for rescan require a two step approval from a Super User and a National User to confirm. ***Note: Packages should not be marked rescan for images that are slightly poor quality, this is for extreme cases only.*** Below are the steps to follow for a Basic User to mark a package *Rescan*.

1. Execute the steps 1-8 outlined in the *Reviewing Packages – Cleared Exceptions* section of the user guide.

- *If at step 8 you have an image with extremely poor quality you can mark the package "Rescan".*

2. Select the *Actions* button at the top of the left panel.

3. Select the submenu items *Rescan > Request re-scan. (Figure 15)*

- *Once selected the package will be updated with a resolution of* Rescan_pending_ro *and the Basic User will return to the Package List page. The package must be confirmed by both the Super User and National User with the appropriate permission for the package to complete the rescan process in the VACMT application.*
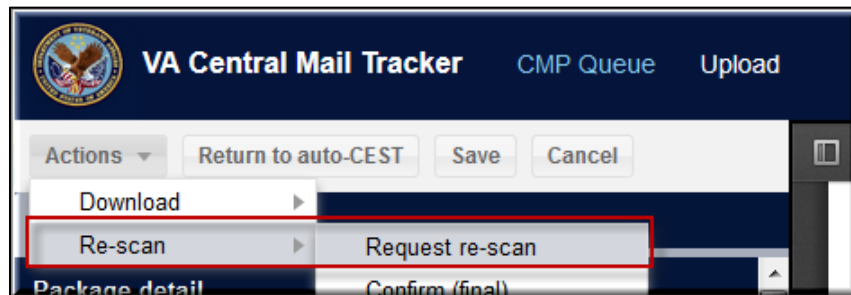

Figure 15 – Rescan

VI. CONFIRMING PACKAGES

Confirming packages is a primary responsibility of a Super User and at times a National User. Super Users must confirm packages marked "Downloaded" and are the first level of confirmation for packages marked "Rescan". National Users may also confirm packages marked "Downloaded" and those National Users with the appropriate permission are the second level approval for packages marked "Rescan".

Confirming Packages – Downloaded

Confirming packages marked "Downloaded" is a primary responsibility of a Super User. Super Users will have to ability to filter packages marked downloaded, review and confirm if the download designation is appropriate. Below are the steps to follow for a Super User to confirm a package marked "Downloaded".

1. Login to the VACMT application.

- *Notice the packages which appear in the datagrid are assigned to the Regional Office of the Super User logged in.*

2. Click the filters button located on the top menu bar.

3. Select the *Resolution* filter option.

4. Select the *DOWNLOAD_PENDING* option in the drop down. *(Figure 16)*

    *   *Notice the packages which appear in the datagrid contain the Resolution selected from the previous step.*
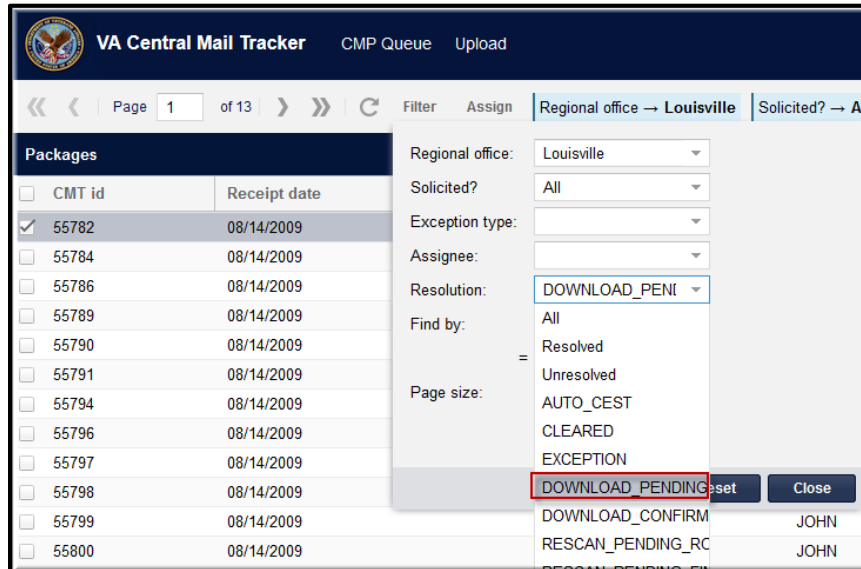
Figure 16 – Download Pending Filter

5. Double-click on the first row in the data grid.

6. Perform a review of the package using steps 1-8 outlined in the Reviewing Packages – Cleared Exceptions section of the user guide.

7. If you agree with what the Basic User determined, select the *Actions* button at the top of the left panel > Select the submenu items *Download > Confirm downloaded*. STOP HERE IF YOU CONFIRM. *(Figure 17)*
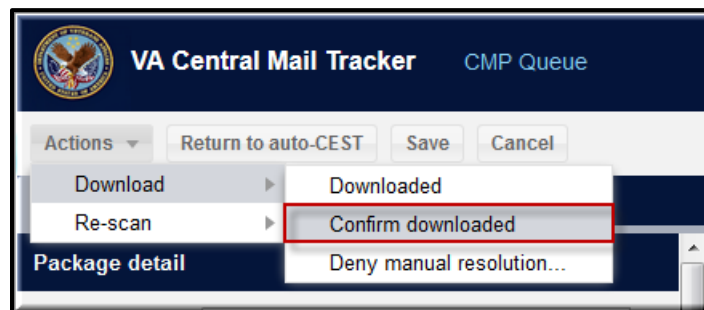
Figure 17 – Confirm Downloaded

    *   *Once selected the package will be updated with a resolution of "Download_confirm" and the Super User will return to the Package List page. At this point the package has completed its workflow in the VACMT application and will not be uploaded to VBMS.*

8. If you do not agree with what the Basic User determined, select the *Actions* button at the top of the left panel . Select the submenu items *Download > Deny manual resolution*.

9. A modal window will appear and will allow you to reassign to any Basic User in the respective Regional Office. Select the reviewer you wish to assign and enter the required comment to explain why the download was denied.

10. Click the *Deny* button at the bottom of the modal window.

   - *Once selected the package will be updated with a resolution of* Exception *and the Super User will return to the Package List page. At this point the package has re-entered the workflow and must be re-reviewed by the Basic User.*

Confirming Packages – Rescan

Confirming packages marked "Rescan" is a primary responsibility of a Super User and National User. Super Users and National Users will have to ability to filter packages marked rescan, review and confirm if the rescan designation is appropriate. Below are the steps to follow for a Super User and National User to confirm a package marked "Rescan".

   SUPER USER

1. Login to the VACMT application.

2. Click the filters button located on the top menu bar.

3. Select the *Resolution* filter option.

4. Select the *RESCAN_PENDING_RO* option in the dropdown.

   - *Notice the packages which appear in the datagrid contain the Resolution selected from the previous step.*

5. Double-click on the first row in the data grid.

6. Perform a review of the package using steps 1-8 outlined in the Reviewing Packages – Cleared Exceptions section of the user guide.

7. If you agree with what the Basic User determined, select the Actions button at the top of the left panel . Select the submenu items *Rescan > Rescan RO confirm* option. STOP HERE IF YOU CONFIRM.

   - *Once selected the package will be updated with a resolution of "Rescan_pending_final" and the Super User will return to the Package List page. At this point the package has been sent to the National User for final confirmation.*

8. If you do not agree with what the Basic User determined, select the *Actions* button at the top of the left panel. Select the submenu items *Rescan > Deny re-scan request* option.

9. A modal window will appear and enter the required comment to explain why the rescan was denied. Select the reviewer you wish to assign and enter the required comment to explain why the download was denied.

10. Click the *Deny* button at the bottom of the modal window.

   - *Once selected the package will be updated with a resolution of* Rescan_deny *and the Super User will return to the Package List page. At this point the package has re-entered the workflow and must be re-reviewed by the Basic User.*

NATIONAL USER (with additional permission to perform final confirmation of rescan)

1. Login to the VACMT application.

2. Click the filters button located on the top menu bar.

3. Select the *Resolution* filter option.

4. Select the *RESCAN_PENDING_FINAL* option in the dropdown.

   - *Notice the packages which appear in the datagrid contain the Resolution selected from the previous step.*

5. Double-click on the first row in the data grid.

6. Perform a review of the package using steps 1-8 outlined in the Reviewing Packages – Cleared Exceptions section of the user guide.

7. If you agree with what the Super User determined, click the *Confirm_final* button at the top left panel of the package detail page. STOP HERE IF YOU CONFIRM. *(Figure 18)*

   - *Once selected the package will be updated with a resolution of* Rescan_confirmed *and the National User will return to the Package List page. At this point the package has completed its workflow in the VACMT application.*
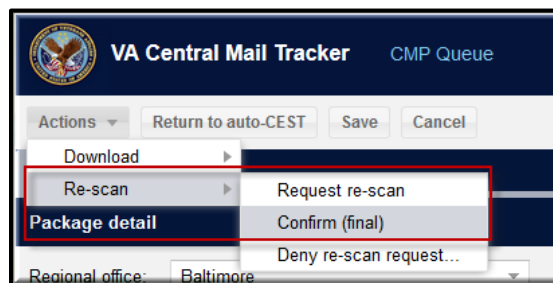

Figure 18 – Confirm Rescan

8. If you do not agree with what the Super User determined, select the Actions button at the top of the left panel. Select the submenu items *Rescan > Deny re-scan request* option.

9. A modal window will appear and enter the required comment to explain why the rescan was denied. Select the Super User or reviewer you wish to assign and enter the required comment to explain why the download was denied.

10. Click the *Deny* button at the bottom of the modal window.

- *Once selected the package will be updated with a resolution of* Exception *and the National User will return to the Package List page. At this point the package has re-entered the workflow and must be re-reviewed by the Basic User.*

VII. FILTERING

All users of the VACMT have the ability to filter on the package lists page to identify packages quickly. The filter button located at the top of the Package List page contains several options which can be used together to quickly identify a package you may be searching for. Simply click the filter button, fill out your filtering criteria and select the filter button to execute. By default, the *Resolution* field is set to *Unresolved* to list documents that require action. If you would like to start your filter over, select the *Reset* button and the filter clears. Filtering options and their descriptions are below: *(Figure 19)*

Figure 19 – Filtering Options

- Regional Office – National users will have the ability to pull packages assigned to a specific regional office. The *All* option is available to view packages across regions. Users who do not have the National role will see their own Regional Office in this filter and it will not be editable.

- Solicited? – Filter by All, Solicited mail, or Unsolicited mail.

- Exception Type – Filter on a specific exception type.

- Assignee – Filter by a specific assignee, selecting from a list of assignees for a respective regional office. Assignee's full name and user name displays in the Package Detail Assignee column.

- Resolution – Filter on a specific resolution including All, Resolved, Unresolved, Exception, Downloaded or Rescan.

- Find by – Find by contains several metadata fields available for searching including: File number, Last name, First name, Middle initial and CMT ID.

- Page Size – Adjust the number of packages displayed in the package list, up to 100.

VIII.   UPLOAD FILES

The VACMT application supports upload of a single PDF or TIF file to enter into the indexing workflow. Privileged users containing a special permission will have access to the Upload page where they can perform an upload. To access, users must click the Upload option in the top menu highlighted here. *(Figure 20)*
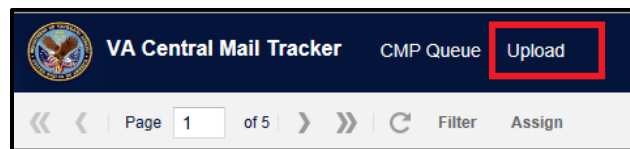

Figure 20 – Upload Page

Once on the upload page, users will notice a disclaimer outlining the types of files the upload feature supports. *(Figure 21)* Review list in the figure.
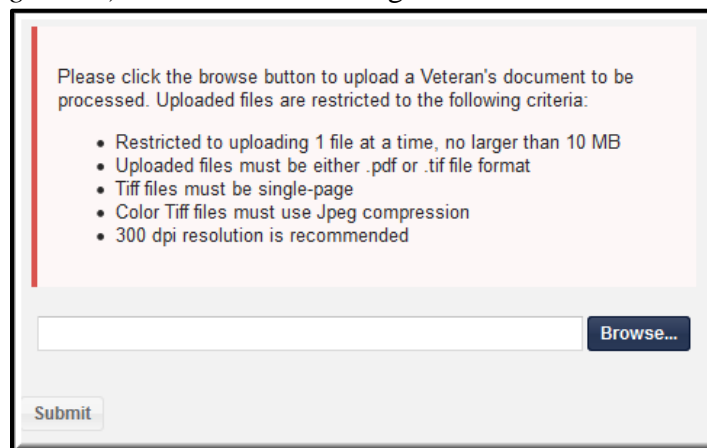

Figure 21 – Upload Disclaimer

Below are steps to use the upload feature.

1. Privileged users with the upload permission must first click the *Upload* to access the upload page.

2. Next users must click the *Browse...* button on the page and locate a .pdf or .tif file on their respective machines. Once a .pdf or .tif file has been located, a user must select the file in the file browser window. The file populates in the File name field. Click the *Open* button to identify it in the application. *(Figure 22)*
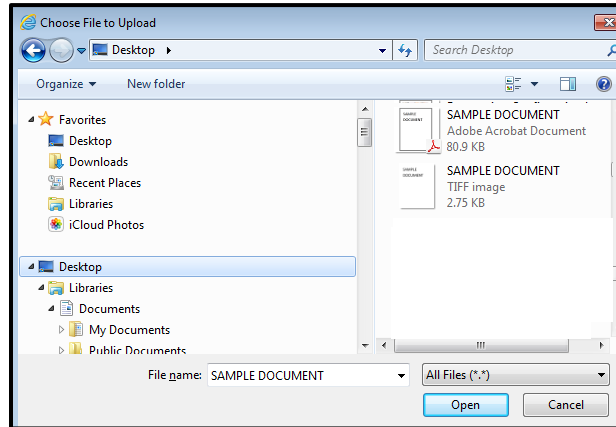

Figure 22 – Select File name and Open

From the Upload window, click the *Submit* button to begin the upload process. Once selected, users will see a progress bar with the status of the upload until the file is completed. *(Figure 23)*
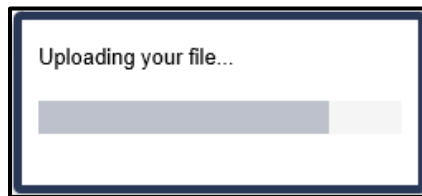

Figure 23 – Upload Progress Bar

-   The speed of the upload can vary and will depend on the size of the file and the speed of the internet connection for a given user.

-   The application will verify a user has selected a .pdf or .tif file prior to upload. If the user selects a different file type, this warning message displays. Click **OK** and upload the correct file type. *(Figure 24)*
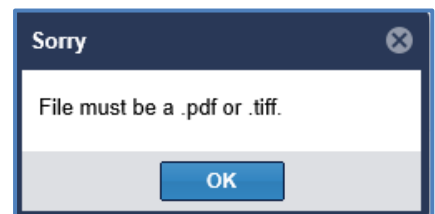

Figure 24 – Upload Validation Warning

IX. REPORTS

The VACMT application contains canned reports accessed by Privileged users containing a special permission. There are reports available for National Users that pertain to the CMP

operation at a high level and reports built for Super Users that focus on data within a specific regional office. To access, users must click the Reports option in the top menu highlighted here. *(Figure 25)*
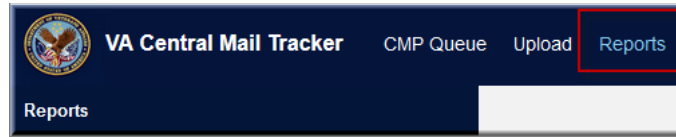

Figure 25 – Reports Page

Once on the reports page users will see a list of reports they have access to on the left panel under the reports title. To access a given report, simply click on the title and options to enter parameters and/or run the report will appear on the right side panel. *(Figure 26)*
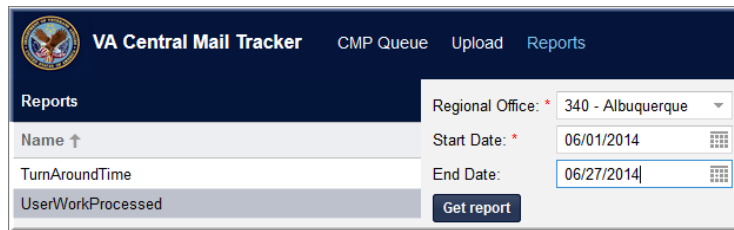

Figure 26 – Report List

Below is a table of available reports, available parameters (if applicable) and the access role of who will have access.

Report	Parameters	Access Role	Description
TurnAroundTime	N/A	National User	Displays turn around time metrics for each phase of the Central Mail process.
UserWorkProcessed	Regional Office, Start Date, End Date	National User	Displays work assigned, reassigned and processed by each basic user for a designated RO.
UserWorkProcessedRO	Start Date, End Date	Super User	Displays work assigned, reassigned and processed by each basic user for the assigned RO.

X.   NAVIGATING THE VACMT INTERFACE

The previous sections described common user tasks for the VACMT interface. This section outlines the basic views of this interface's two main screens – **Package List** and **Package Details**. Each is comprised of different areas, as described in Figure 27 and Figure 28.
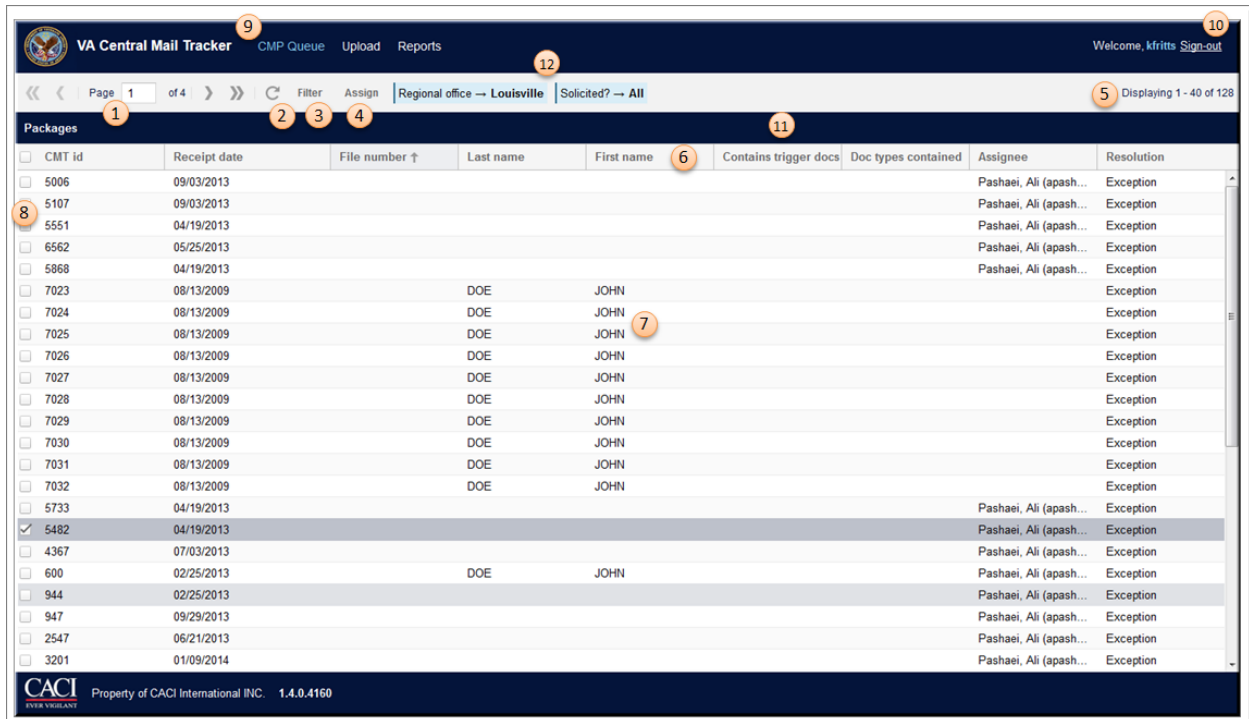
Figure 27 – Package List

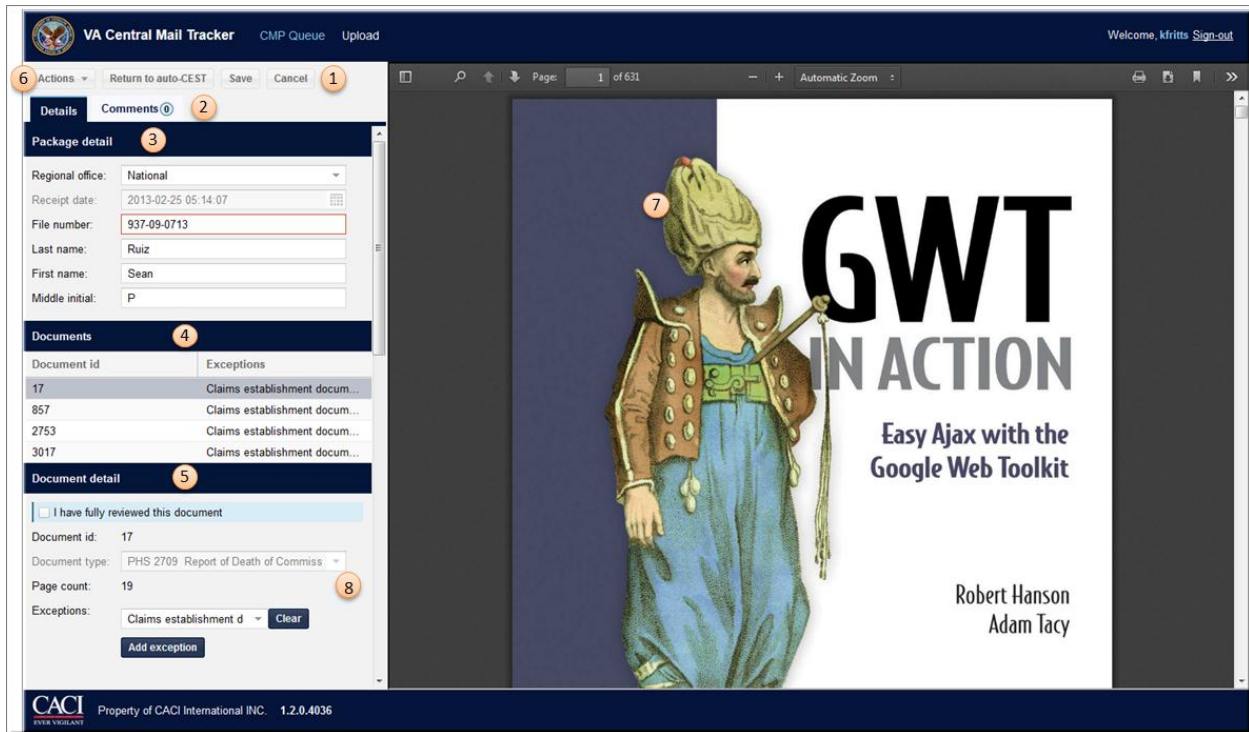|	ITEM	DESCRIPTION
1	Page Navigation	Jump to the first, previous, specific page, next, or last page of the Package Lists.
2	Refresh Page	Resets the page back to the original view.
3	Filter	Narrows package list by the selected field, e.g., Regional office, (un)solicited packages, exception types, assignees, veteran name/file number, and allows User to designate number of packages to list per page.
4	Assign	Allows Super User to assign specific packages to a User
5	Page Display Count	Shows current range of packages and the total number of packages.
6	Column Headers	Identifies package metadata (fields) and can be sorted or reconfigured to show/hide desired fields.
7	Document Rows	Reflects available packages in queue.
8	Selection Checkbox	Used to select all or specific packages to be assigned.
9	Function Icons	Quick access to package list by clicking the CMP Queue. 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	An indicator on the datagrid display appears when a package contains a trigger document. A trigger document is defined as: 1. VA Form 21-526 (526EZ, 526b, 526c, etc.) 2. VA Form 21-4138 3. Non- Rating CESTS (VA Form 21-686, 686c, 674, 674b), 4. VA Form 27-0820 5. VA From 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.

Figure 28 – Package Detail

	ITEM	DESCRIPTION
1	Package Menu Bar	Choose button to complete an action for the current package. Users can access the actions menu, Return to auto-cest, save updated details or cancel changes.
2	View Tabs	Toggle between Details (shown) or Comments (containing view-only notes about the package; indicates number of comments available).
3	Package Detail	Contains the Regional office drop down menu field to show the assigned regional office or change the location, Receipt date field which tracks the date the package was received, and entry fields for File number and Last /First names and Middle initial.
4	Documents	Lists the documents contained in the package.
5	Document Detail	Shows information about the selected document.
6	Actions Menu	Click Actions on the Package Menu bar to request Download or Rescan status. Also where Super Users and National Users go to confirm/deny these requests.
7	Image	Displays the image of the document selected on the left
8	Exceptions	Exceptions are at the bottom of the document detail panel, to view you must scroll to the bottom of this view.