

**Department of Veterans Affairs  
Digitized Mail Handling Services (DMHS)  
Centralized Mail (CM) Portal**

**User Manual**



**Prepared by:**



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## Version History

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# 1 Introduction

The Department of Veterans Affairs' (VA) ongoing, substantial effort to improve and streamline paperless claims processing utilizes Digitized Mail Handling Services (DMHS) to support Intake, Conversion, and Mail Handling Services (ICMHS) processing of Centralized Mail (CM) content and documents. These services provide access to Veterans Benefits Administration (VBA) users for viewing digitized mail images and associated metadata via the DMHS CM Portal.

The process involves receipt of physical material from five (5) distinct sources:

- VBA Regional Offices (RO) and Pension Management Centers (PMC)
- Mail sent directly by Veterans or VBA Offices to designated Post Office (PO) Boxes
- Facsimile receipts from Veterans, VA Offices, and Veterans Service Organizations (VSO)
- Direct digital uploads of claims and evidence from VSO
- Private Medical Record (PMR) documentation from a VBA-designated PMR vendor

The DMHS CM Portal allows ICMHS and VBA/PMR vendors to submit, manage, and view documents in the system. The CM Portal provides a single-portal interface, which accesses digitized mail documents from all ICMHS and VBA/PMR vendors. VBA users can upload, view, retrieve, assign, and edit metadata before final documents are submitted to the Veterans Benefits Management System (VBMS).

DMHS provides the following interfaces to support intake and processing of ICMHS CM content and documents:

- CM Interface – consumes and processes digitized mail received from ICMHS vendors
- Direct Upload (DU) Interface – processes claims documents directly to the DMHS CM Portal
- Decision Ready Claims (DRC) Interface – processes VA compensation claims uploaded directly
- AutoEstablish/AutoCEST (AE) Interface – processes AutoEstablish claims

## 1.1 Purpose

The DMHS CM Portal User Manual explains the procedure for accessing and utilizing the improved functionality of the new CM Portal. Significant modifications have been incorporated to improve user experience, system efficiency, and program analytics. The resulting CM Portal application is more user-friendly with easier intuitive interaction. Enhanced database capabilities and improved scalability will accommodate customized VA technical and functional needs for CM processing now and into the future.

## 1.2 DMHS CM Portal Access Requirements

In order to access the new CM Portal, you must connect to the system using a secure VA virtual private network (VPN). Access is restricted by Internet Protocol (IP) address. If you are outside of the designated VA IP address range, CM Portal access is blocked.

Microsoft **Internet Explorer (IE) 11** or higher is the only supported web browser for entering the CM Portal. Other browsers (such as Google Chrome, Mozilla Firefox, and Microsoft Edge) are not fully supported at this time and may cause connectivity or technical issues while using the CM Portal.

The web address for the [CM Portal](https://dmhs.digitalcontentservices.com/) is <https://dmhs.digitalcontentservices.com/>.

## 1.3 Technical Support Help Desk

The **CM Portal Help Desk** provides technical support to maintain maximum system access with minimum downtime. User access management (UAM) requests are resolved quickly.

All emergency, system performance, availability, or non-UAM issues must be reported directly to the Veterans Claims Intake Program (VCIP). VCIP initiates the resolution process with the CM Portal Help Desk, during or after normal duty hours as necessary.

Normal duty hours for **CM Portal Help Desk** [email support](#) are **Monday through Friday** from **8:00 a.m.** until **5:00 p.m.** Eastern Standard Time (**EST**). All UAM email requests receive a response during normal duty hours.

Contact the [CM Portal Help Desk](#) at [dmhs\\_support@leidos.com](mailto:dmhs_support@leidos.com).

## 2 Accessing the CM Portal

Using a computer with a secure VA VPN connection, open **Internet Explorer (IE) 11** or higher web browser and proceed to the **CM Portal Home Page** at <https://dmhs.digitalcontentservices.com>.

The **CM Portal Home Page** features two (2) options for user entry: **Single Sign-On** and **Contractor Login**. Select the **Single Sign-On** button.

Figure 1: Centralized Mail Portal Home Page

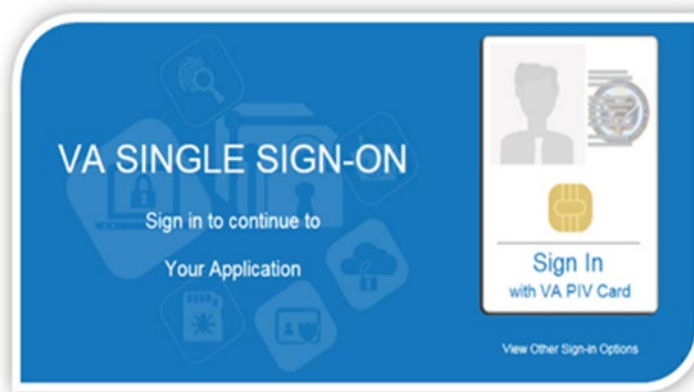


Members of groups **contracted** by the VA will select **Contractor Login**. The CM Portal User Manual does not explain Contractor Login, since VA personnel do not utilize this feature.

### 2.1 Single Sign-On for VA Employees within the VA Network

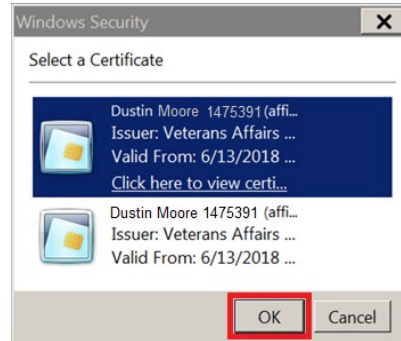
In the **VA Single Sign-On** window, click the **Sign In with VA PIV (Personal Identity Verification) Card** symbol.

Figure 2: VA Single Sign-On Window



Select a **Certificate** from the **Windows Security** window, and click the **OK** button.

**Figure 3: Select a Certificate Window**



Enter your **Personal Identification Number (PIN)** in the **Windows Security** window, and click the **OK** button.

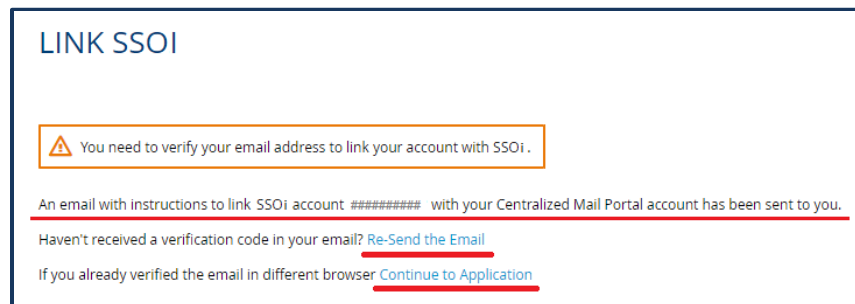
**Figure 4: Windows Security PIN Window**



After the VA sign-on authentication process is complete, the **Link SSOi** (Single Sign-On Internal) window appears if you need to connect your VA Single Sign-On and CM Portal accounts. You must verify your email address to link these accounts.

If you have an active and linked CM Portal account, you are automatically directed to the **CM Portal Centralized Mail Home Page**.

**Figure 5: Link SSOi Window**

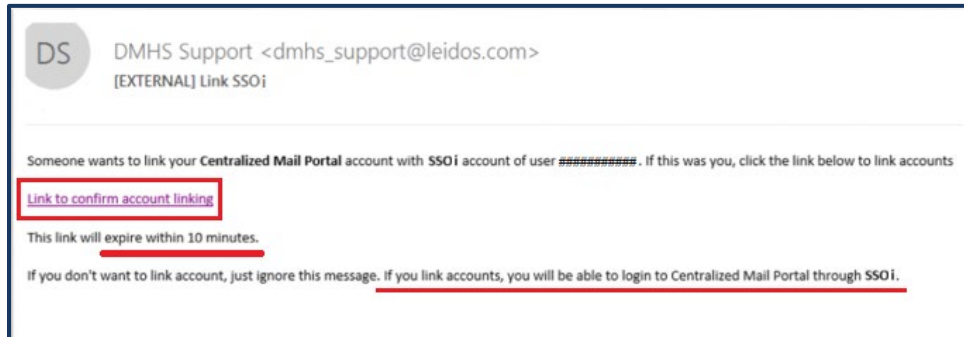


**DMHS Support** will send a **Link SSOi** email with instructions for linking the accounts. It may take up to five (5) minutes from when the **Link SSOi** window appears to receive this email. If you do not receive the email, click the **Re-Send the Email** option in the **Link SSOi** window.

Do **NOT** close the **Link SSOi** window; it will be accessed again later.

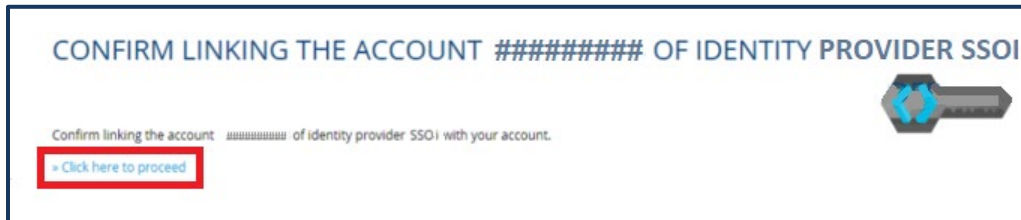
When you receive the **Link SSOi** email, click the link provided to open **Confirm Linking the Account** in a new browser window. The email link expires within **10** minutes from receipt.

**Figure 6: DMHS Support Link SSOi Email**



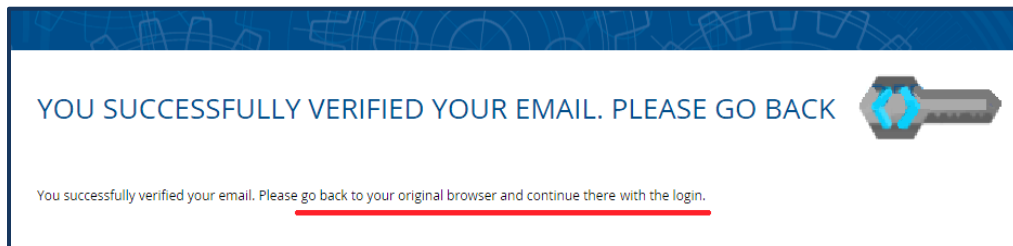
Select **Click here to proceed** in the **Confirm Linking the Account** window.

**Figure 7: Confirm Linking the Account Window**



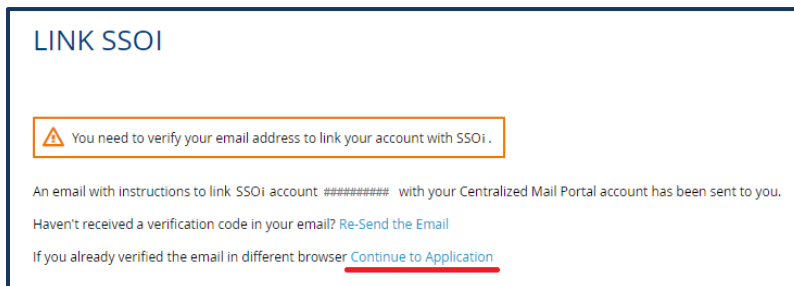
A confirmation message indicates that you successfully verified your email address.

**Figure 8: Successful Verification Confirmation Window**



Return to the **Link SSOi** window once your email address is verified, and click **Continue to Application**.

**Figure 9: Link SSOi Window – Continue to Application**



If you have an active CM Portal account, you are directed to the **CM Portal Centralized Mail Home Page**.

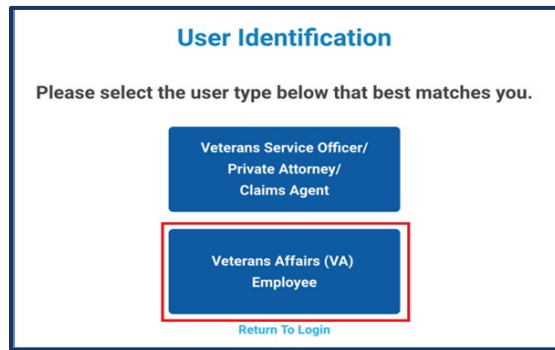
If you do NOT have a CM Portal account, you must complete the **Initial User Registration and Identification** process.

## 2.2 Initial User Registration and Identification

You must register during your **first sign-on** attempt. The system retains user registration information for future access.

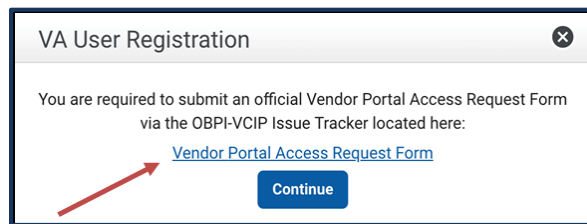
Select the **Veterans Affairs (VA) Employee** button on the **User Identification** screen.

Figure 10: User Identification Screen



The **VA User Registration** window is displayed. Click the **Vendor Portal Access Request Form** link to open the VA registration form. You must complete the **Vendor Portal Access Request Form** to enter the CM Portal.

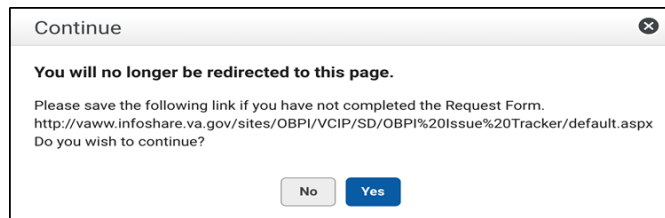
Figure 11: VA User Registration Window



Your account will be verified and assigned a **User Role** and permissions by the System Administrator before you can log in to the CM Portal.

If you select **Continue**, instead of the Vendor Portal Access Request Form, the following message appears.

Figure 12: Continue Message



Save the link provided to complete the **VA User Registration** process later.

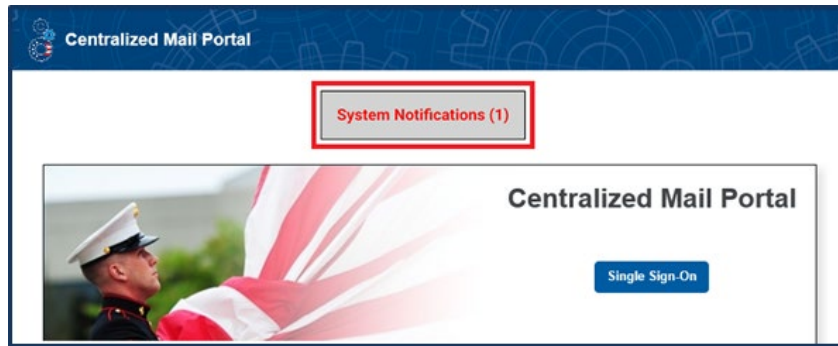
Click **Yes** to be redirected to the **Vendor Portal Access Request Form** and complete the **VA User Registration** process. Selecting **No** returns to the **User Identification** screen.

## 2.3 System Notifications Prior to Access

**System Notifications** announce important CM Portal information that must be acknowledged before accessing the system.

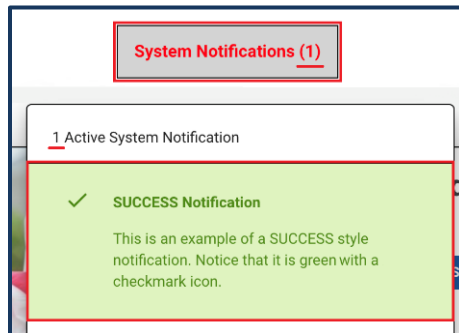
The **System Notifications** button displays at the top of the **CM Portal Home Page** when announcements, which are indicated by the number in parenthesis, are available.

Figure 13: CM Portal Home Page System Notifications







Click the **System Notifications** button to reveal the **System Notifications** window.

Figure 14: System Notifications Window

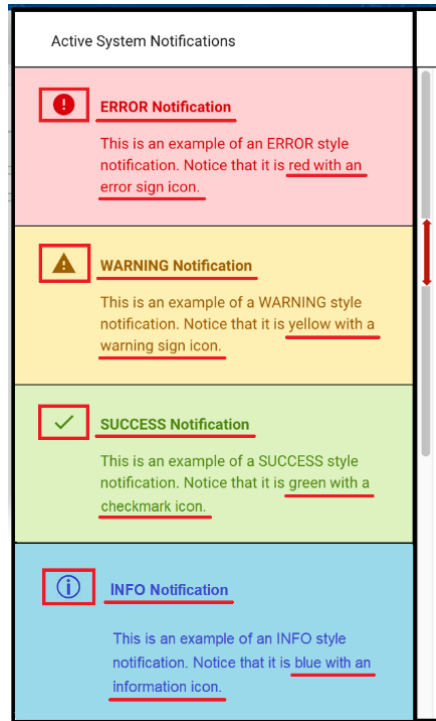


Use the vertical, gray **Scroll Box** (click and hold to drag up or down) to view all available messages from four (4) categories:

- **ERROR** Notification – red with an **Error Sign**  icon
- **WARNING** Notification – yellow with a **Warning Sign**  icon
- **SUCCESS** Notification – green with a **Checkmark**  icon
- **INFO** Notification – blue with an **Information Sign**  icon



**Figure 15: System Notification Categories**



Click anywhere on the screen outside of the **System Notifications** window to close it. Check periodically for updates or new messages.

System Notifications cannot be dismissed once viewed and remain until removed by the System Administrator.

## 3 Application Toolbar

The **Application Toolbar** at the top of the window displays available application options on the right side of the Centralized Mail Portal logo. All users are granted basic CM Portal application permissions. **User Role** assignment governs overall access, which is detailed in Section 4. Your actual Application Toolbar may vary.

Figure 16: Entire CM Portal Application Toolbar



### 3.1 Centralized Mail

The Centralized Mail option processes a mail packet from the point of receipt by the CM Portal until final disposition (uploaded to the VBMS, marked as Unidentified Mail, etc.). The Centralized Mail button is displayed if you have user role access. CM functionality is described in Sections 6–7.

### 3.2 Direct Upload

The Direct Upload option processes claims documents directly to the CM Portal. The Direct Upload button is displayed if you have user role access. Direct Upload functionality is explained in the Veterans Service Organization (VSO) User Manual.

### 3.3 Decision Ready Claims

The Decision Ready Claims option processes claims submitted by an accredited VSO for a final decision within 30 days from receipt. The Decision Ready Claims button is displayed if you have user role access. Decision Ready Claims functionality is explained in the VSO User Manual.

### 3.4 Admin

The Admin (Administration) option can add, modify, and disable user accounts. The Admin button is displayed if you have user role access. Administration functionality is described in Section 8.

### 3.5 System Notifications







System Notifications (represented by **Stationary**  or **Ringling**  **Bell** icons) announce important CM Portal information that is relevant while actively working in the system. The **Ringling Bell** icon indicates that announcements are available, which is specified by the number on the right side of the icon.

Figure 17: Ringling Bell Icon with Four System Notifications

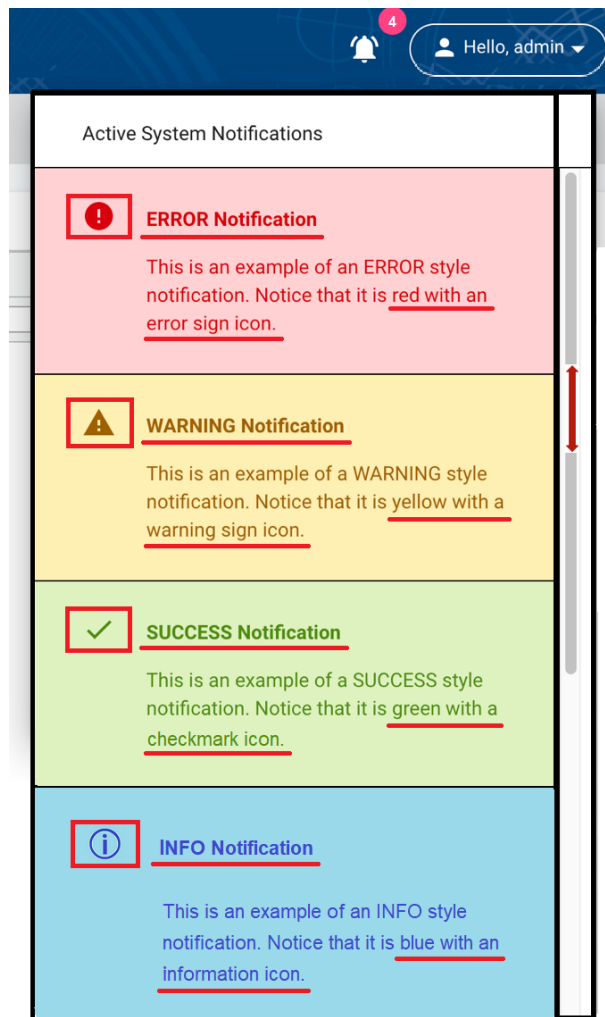


Click the **Ringling Bell**  icon to reveal the **System Notifications** window.

Use the vertical, gray **Scroll Box** (click and hold to drag up or down) to view all available messages from four (4) categories:

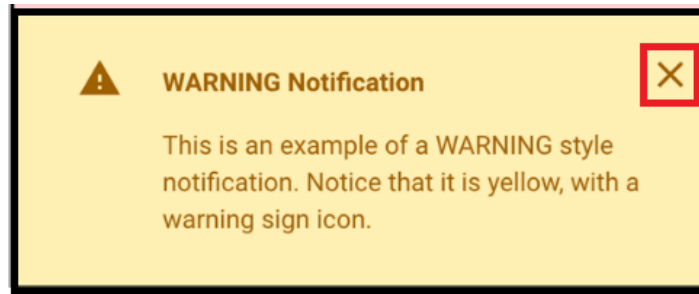
- **ERROR** Notification – red with an **Error Sign**  icon
- **WARNING** Notification – yellow with a **Warning Sign**  icon
- **SUCCESS** Notification – green with a **Checkmark**  icon
- **INFO** Notification – blue with an **Information Sign**  icon

**Figure 18: System Notifications Window with All Four Notification Categories**



Certain Notifications can be permanently dismissed after review, while others temporarily disappear during the current session only. These messages reappear for the next session and remain active until removed by the System Administrator.


The **X** icon on the right side of the Notification either permanently or temporarily deletes the message. Notifications without the **X** icon can only be eliminated by the System Administrator.

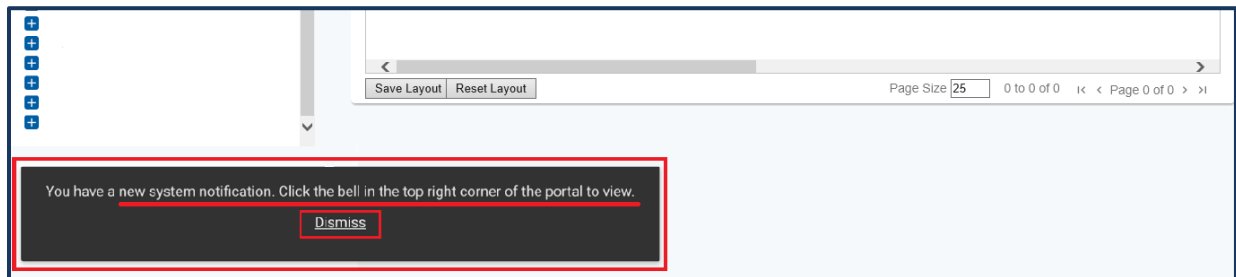
**Figure 19: Delete System Notifications Using the X Icon**

Click anywhere on the screen outside of the **System Notifications** window to close it.

A **System Notification Message** window appears in the lower left corner of the screen when a new Notification is posted during the session.

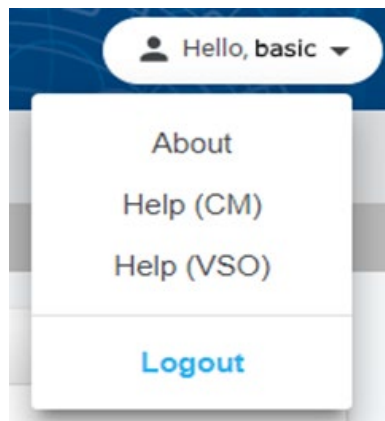
Click the **Dismiss** button to close the window; otherwise, it automatically closes in seven (7) seconds.

Proceed to the **Ringling Bell**  icon to reveal the **System Notifications** window. Check periodically for updates or new messages.

**Figure 20: New System Notification Message Window**

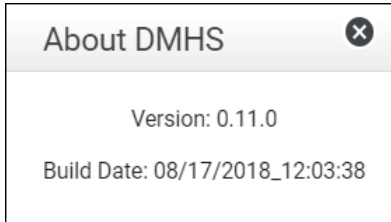
## 3.6 Hello, User

Your user account button is located on the far right side of the Application Toolbar. Click the **Down Arrow** to view the menu options. Options vary based on user role access.

**Figure 21: User Account Basic Menu Options**

**About** provides information on the DMHS Version and Build Date.

**Figure 22: About DMHS Information**



**Help (CM)** opens [this User Manual](#) in a new browser tab.

**Help (VSO)** opens the **Veterans Service Organization (VSO) User Manual** in a new browser tab.

**Logout** ends your CM Portal session. You must log out to disconnect from the system when you are ready to exit the CM Portal.

The system automatically ends your session after **60** minutes of inactivity. If you do not access your CM Portal account for a period of **90** days, it will be deactivated. Contact the **CM Portal Help Desk** ([Section 1.3](#)) to reactivate your account.

## 4 User Roles, Permissions, and Queues

CM Portal functionality access is governed by **User Role** and **Location** assignments from the System Administrator; therefore, you may not have access to all applications.

The CM Portal supports six (6) **User Roles**:

- Basic User
- Super User
- Supervisor
- Records Management Officer (RMO)
- National Reviewer
- Contracting Officer's Representative (COR)

Each **User Role** is assigned to at least one (1) **Location**. Only two (2) exceptions have permission for all Locations:

- **National Reviewers** have read-only access for mail packets in all Locations, excluding those marked as Restricted.
- A **COR** has authorization to perform all functions on all mail packets at all Locations.

The **System Administrator** is an external, nonassignable role (not a VA employee) that monitors the system environment to ensure continuous, optimal performance of CM Portal functions and support systems, including managing user access and permissions, system notifications, and system security.

### 4.1 Basic User Role

The Basic User performs these functions at designated Locations:

- Assign Do Not Upload status to a packet
- Request a Re-scan of a packet
- Request a Split on a packet
- Request a Hold on a packet
- Request that a packet is designated as Unidentified/Unidentifiable Mail (UM)
- Route a packet to the Reassign Queue for a new location
- View assigned packets in the Centralized Mail Queue
- View all user packets in Centralized Mail Search results, if the location is not restricted
- Perform Basic User functions on packets assigned to any user in the Search results
- Upload a packet to the VBMS
- Add or view Notes
- Download a packet
- Review packet history
- Export as CSV by creating a comma-separated value (CSV) file to transfer data into a spreadsheet format using Search results

- Mark packet as Unread

## 4.2 Super User Role

The Super User performs the same functions as a Basic User at designated Locations plus these additional tasks:

- Process packets in the Authorization Queue (first-level Split and Re-scan requests)
- Process packets in the Reassign Queue
- Assign packets to users for processing

## 4.3 Supervisor User Role

The Supervisor performs the same functions as a Super User at designated Locations plus these additional actions:

- Process packets in the Unidentified Mail First Queue

## 4.4 Records Management Officer (RMO) User Role

The RMO performs these functions at designated Locations:

- Process packets in the Unidentified Mail Final Queue
- View packets
- Review packet history
- Download a packet to a local workstation
- Export as CSV using Centralized Mail Search results
- View and add notes to any packet using Search results

## 4.5 National Reviewer User Role

The National Reviewer performs these functions at all unrestricted Locations:

- View packets
- Review packet history
- Download a packet to a local workstation
- Export as CSV using Centralized Mail Search results
- View packet notes

## 4.6 Contracting Officer's Representative (COR) User Role

The COR performs the functions of all user roles for all Locations plus these additional actions:

- Process packets in the COR Authorization Queue (final-level Re-scan requests)
- Process packets in the Unidentified Mail Final Queue
- Add, update, and delete Users, Roles, and Locations
- Access and update the Admin (Administration) function

- Perform a Retrigger action on a completed packet

## 4.7 Queues

Mail packets are placed into various processing **Queues** based on the current state of the packet. The mail packet resides in a particular Queue until operations are performed that progress it to another Queue. Queue assignments are dictated by **User Role**, which are listed in Table 1.

**Table 1: Queue Assignments Based on User Role**

User Role	Queue	Description
Basic User	Hold	Contains packets placed on hold, which may require additional information to continue processing
	Work	Contains packets assigned to a specific user at a specific location for processing
Super User	Assignment	Contains packets pending assignment to a Work Queue
	Authorization	Contains packets requested for Re-scan or Split that require Supervisor or Super User authorization to continue
	Hold	Contains packets placed on hold, which may require additional information to continue processing
	Reassign	Contains packets that require rerouting to a different location or user for processing
	Work	Contains packets assigned to a specific user at a specific location for processing
Supervisor	Assignment	Contains packets pending assignment to a Work Queue
	Authorization	Contains packets requested for Re-scan or Split that require Supervisor or Super User authorization to continue
	Hold	Contains packets placed on hold, which may require additional information to continue processing
	Reassign	Contains packets that require rerouting to a different location or user for processing
	Unidentified Mail (UM) First	Contains packets that a Basic User or Super User has designated as Unidentified Mail
	Work	Contains packets assigned to a specific user at a specific location for processing



User Role	Queue	Description
RMO	Unidentified Mail (UM) Final	Contains packets that a Supervisor or Super User has authorized as Unidentified Mail
National Reviewer	Assignment	Contains packets pending assignment to a Work Queue
	Authorization	Contains packets requested for Re-scan or Split that require COR, Supervisor, or Super User authorization to continue
	Hold	Contains packets placed on hold, which may require additional information to continue processing
	Reassign	Contains packets that require rerouting to a different location or user for processing
	Unidentified Mail (UM) Final	Contains packets that a Supervisor has authorized as Unidentified Mail
	Work	Contains packets assigned to a specific user at a specific location for processing
COR	Assignment	Contains packets pending assignment to a Work Queue
	Authorization	Contains packets requested for Re-scan or Split that require COR, Supervisor, or Super User authorization to continue
	COR Authorization	Contains packets that a Super User or Supervisor authorized for Re-scan by a scanning vendor
	Hold	Contains packets placed on hold, which may require additional information to continue processing
	Reassign	Contains packets that require rerouting to a different location or user for processing
	Unidentified Mail (UM) Final	Contains packets that a Supervisor has authorized as Unidentified Mail
	Work	Contains packets assigned to a specific user at a specific location for processing

## 5 Display Controls

The display on most screens in Centralized Mail can be expanded or collapsed and navigated both horizontally and vertically to extend the view of available information.

### 5.1 Horizontal Display Controls


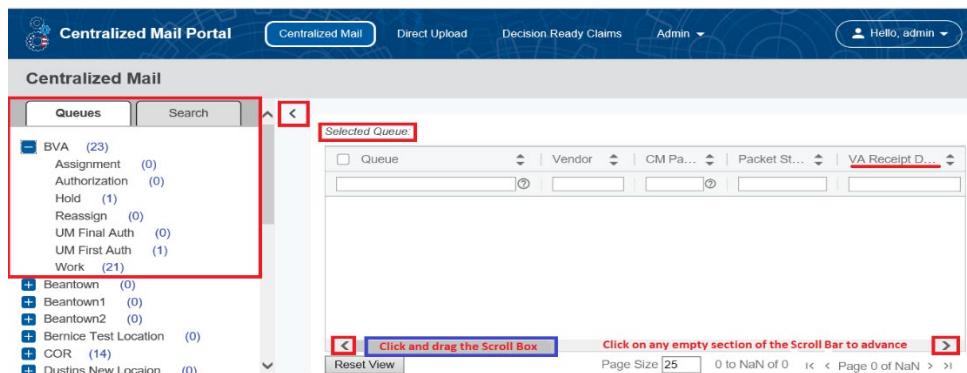
The **horizontal display** shows all data to the far left side of the window when the **Left Arrow**  icon is visible at the top left side of the **Task Bar** above the **Selected Queue** or **Search Results Grid** (or on any screen in the program). This is the standard view for the main screen in Centralized Mail, which features the **Queues** and **Search Tabs** on the left side. Menu options on the left vary depending on the screen.

Figure 23: Left Arrow Standard Main Screen View



View additional information from results on any screen in both horizontal directions using various methods:




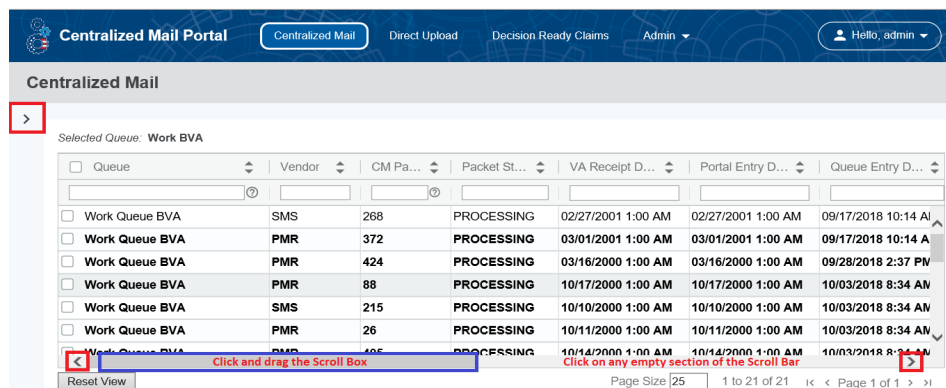
- **Left**  and **Right**  **Scroll Arrow** icons on the **Horizontal Scroll Bar** at the bottom of the window – single click repeatedly or click and hold on the mouse depending on the desired advancement speed.
- The gray **Scroll Box** (highlighted in blue) – click and hold to drag.
- Any empty section of the **Scroll Bar** – single click or click and hold to advance.
- **Left Arrow**  icon at the top left side of the **Task Bar** – click to expand the selection to the right by hiding the options menu on the left side of the screen.

Figure 24: Left Arrow Changes to Right Arrow in Expanded Screen View



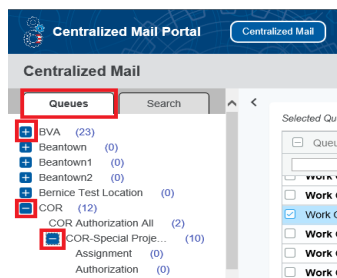
The **Left Arrow** < icon changes to a **Right Arrow** > icon in the expanded screen view. Use the **Scroll Arrows, Box, or Bar** at the bottom of the window to view additional information in either direction.

Click the **Right Arrow** > icon to collapse the screen and return to the standard view with the menu options on the left, thus reverting to the **Left Arrow** < icon.

## 5.2 Vertical Display Controls

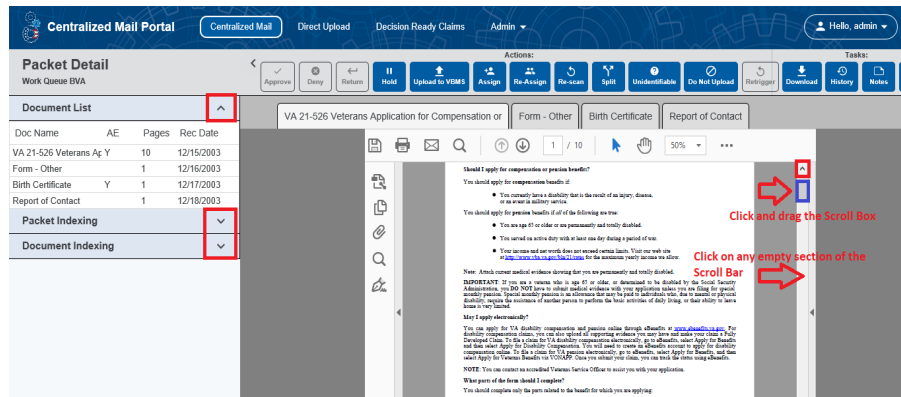
The **vertical display** can be **expanded** to view additional information using the blue **Plus Sign** + icon or **contracted** using the blue **Minus Sign** - icon, as seen on the **Queues Tab** on the left side of the main screen in Centralized Mail.

Figure 25: Vertical Display Controls – Blue Icons



The **vertical display** may also be **expanded** to view additional information using the **Down Arrow** ↓ icon or **contracted** for a cleaner presentation with the **Up Arrow** ↑ icon, especially in the menu options on the left side of the screen.

Figure 26: Various Vertical Display Controls



View additional information from results on any screen using the **Vertical Scroll Bar** whenever it appears on the right side of a menu, document, or window:

- **Up** ↑ and **Down** ↓ **Scroll Arrow** icons – single click repeatedly or click and hold on the mouse depending on the desired advancement speed.
- The gray **Scroll Box** (highlighted in blue) – click and hold to drag.
- Any empty section of the **Scroll Bar** – single click or click and hold to advance.

## 5.3 Page Navigation and Display Controls

Page navigation and display controls are located on the **Status Bar** at the bottom of the page:

- The **Backward** and **Forward Page Arrow** < > icons, immediately surrounding the page numbers on the right side of the Status Bar, scroll through one page at a time.
- The **First Page** and **Last Page Arrow** |< >| icons, furthest from the page numbers, skip to the first or last page respectively.
- Change the number of rows displayed on the page by entering the desired number in the **Page Size** numeric field in the middle of the **Status Bar** and clicking the **Enter** key. The default page size is **25** rows. Approximately **9** rows are visible within the window before using the **Vertical Scroll Bar** to move up or down on the page. The total number of rows and the current row group displayed based on the Page Size setting are shown on the right side of the **Page Size** field.
- The **Reset View** button on the left side of the **Status Bar** reloads the page and displayed results to the default setting for column order and size (Section 6).

Figure 27: Page Display Controls



## 6 Centralized Mail (CM)

The Centralized Mail application processes a mail packet from the point of receipt by the CM Portal until final disposition (uploaded to the VBMS, marked as Unidentified Mail, etc.). Centralized Mail is only accessible and visible on the **Application Toolbar** to users with permission granted by the System Administrator.

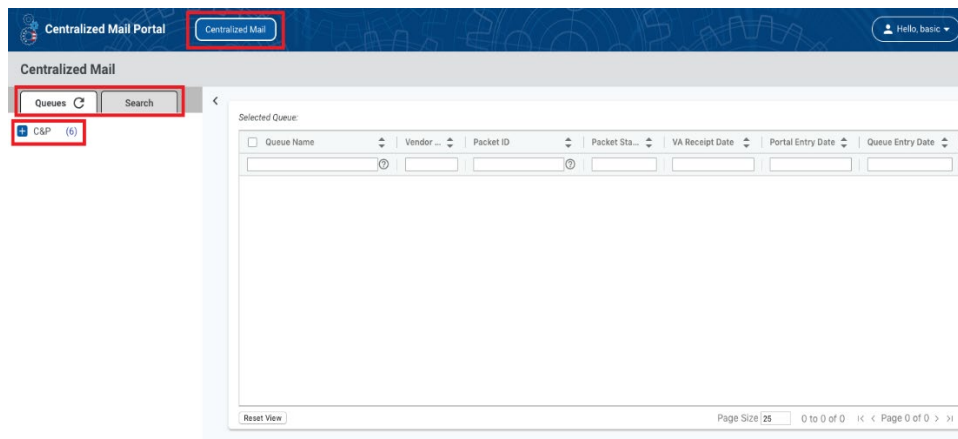
**Figure 28: CM Portal Application Toolbar – Centralized Mail**



The **Home Page** for **Centralized Mail** is the main screen that appears after signing on. This screen enables users to access their various assigned **Queues** and **Locations** in the main menu options on the left side of the screen:

- The **Queues Tab** displays all assigned packets within the **Queue Hierarchy** (Section 6.1) to access for processing.
- The **Search Tab** (Section 6.3) searches the entire CM Portal database for packets meeting specified criteria.

**Figure 29: Centralized Mail Home Page**



### 6.1 Queue Hierarchy

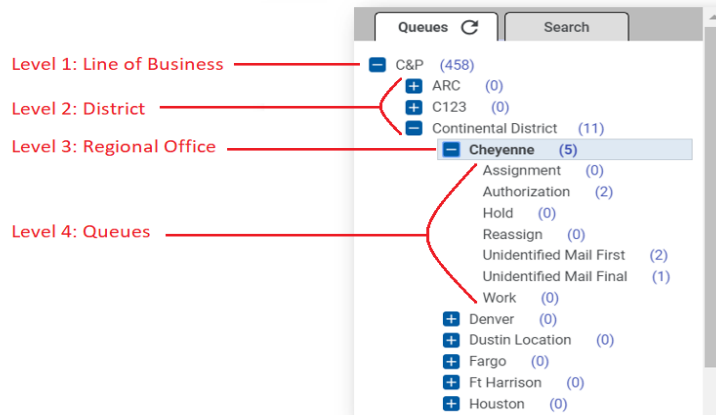
Each packet in the CM Portal is associated with a specific **Line of Business**, **Location**, and **Queue** that are displayed in a tree structure known as the **Queue Hierarchy** on the **Queues Tab**. Users process packets that reside in various Queues for their assigned Location(s).

The **Queue Hierarchy** is organized by four (4) levels:

- **Level 1 – Line of Business** (e.g., BVA, C&P, and COR – see Appendix A for acronym descriptions)
- **Level 2 – District** (e.g., Continental, Midwest, and North Atlantic)
- **Level 3 – Regional Office** (e.g., Milwaukee, St. Paul, and Philadelphia)
- **Level 4 – Queue** (e.g., Assignment, Authorization, Hold, and Work)

Not all Lines of Business on Level 1 have Levels 2–4 beneath them. For example, a Line of Business may not have Districts on Level 2.

Figure 30: Queue Hierarchy Example



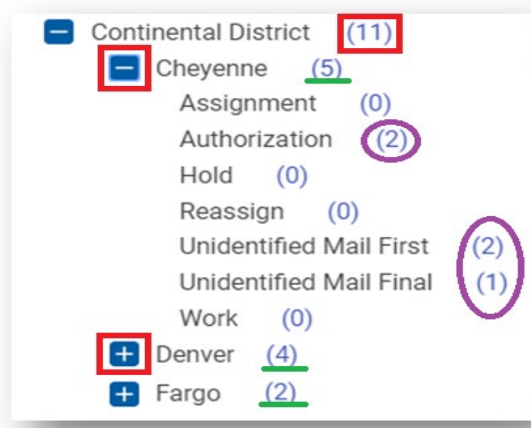
### 6.1.1 Navigating the Queue Hierarchy

The blue **Plus Sign** **+** icon vertically expands the associated level. The blue **Minus Sign** **-** icon collapses the level.

Click the **Location/Queue name** to display the entire contents for that Location/Queue in the **Selected Queue** window.

The **Packet Count** number in parenthesis on the right side of the **Location/Queue** indicates the total number of packets at or below that level. Click on the **Packet Count number** to initiate **Automatic Mode** for the associated **Location/Queue** ([Section 7.4](#)).

Figure 31: Queue Hierarchy Location/Queue/Packet Count



In the figure above, there are **11** total packets for the Continental District, which is the sum of the packets at the Regional Offices (RO) in Cheyenne, Denver, and Fargo (underlined in green). The Cheyenne RO has **5** packets in the various queues (Authorization, UM First, and UM Final), which are circled in purple.

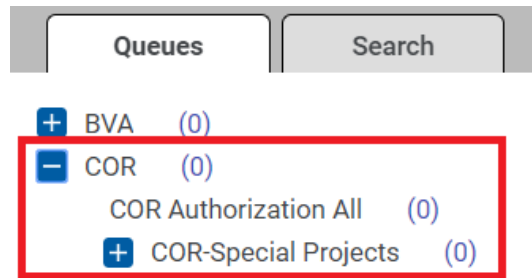
### 6.1.2 Special Processing for COR Users

A **COR** has authorization to perform all functions on all packets at all **Locations**; therefore, the **Queue Hierarchy** for a **COR** is presented in a summary format based on processing category as opposed to the four (4) hierarchical levels.

There is a **Line of Business** on **Level 1** in the **Queue Hierarchy** named **COR** that has two (2) processing **Queues** on Level 2:

- **COR Authorization All** holds all packets that require COR authorization from all Locations.
- **COR-Special Projects** contains the assigned Queues.

Figure 32: COR Line of Business on Level 1 in the Queue Hierarchy



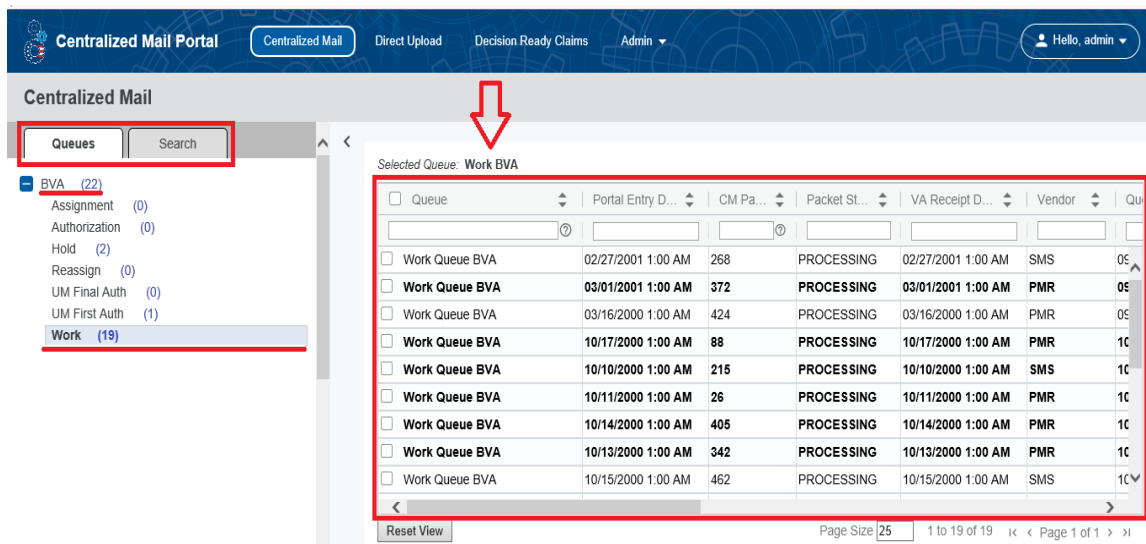
## 6.2 Mail Packet Results Grid

The **Mail Packet Results Grid** displays summary information for packets on the **Queues** and **Search** **Tabs**. Customizable features allow a tailored presentation for enhanced viewing.

### 6.2.1 Results Grid Display

When a **Location/Queue** is chosen for viewing in the **Queue Hierarchy** on the **Queues Tab**, the selection is highlighted in blue. The **Selected Queue** is also displayed at the top of the **Results Grid**. Summary information about packets can be accessed using the **Horizontal, Vertical, and Page Display Controls** ([Section 5](#)).


Figure 33: Mail Packet Results Grid Display



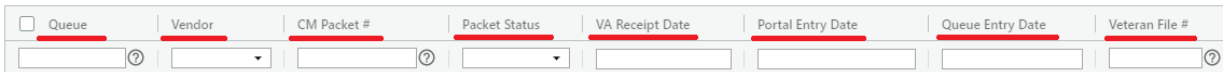
### 6.2.1.1 Results Grid Columns

The **Results Grid** provides basic packet information separated into **15** column topics:

- **Queue** – work processing category in which the packet resides based on its current state
- **Vendor** – ICMHS vendor that administers packet upload into the CM Portal
- **CM Packet Number** – unique numerical identifier assigned to the packet
- **Packet Status** – current state of the packet (e.g., Processing, Complete, or Pending Upload)
- **VA Receipt Date** – date on which packet documents are acquired by the VA from the originating source
- **Portal Entry Date** – date on which the packet is uploaded into the CM Portal
- **Queue Entry Date** – date on which the packet is assigned to the current Queue
- **Veteran File Number** – unique numerical identifier assigned to each Veteran
- **Last Name** – legal Veteran surname
- **First Name** – legal Veteran given name
- **Document Type** – VA Form Numbers that identify essential documents in the packet
- **Notes** – most recent annotations regarding the packet
- **EMERG** – emergent claim situations associated with the packet (e.g., homeless, terminally ill, or blind)
- **Confirmation Number** – unique numerical identifier assigned to **Direct Upload** and **Decision Ready Claims** submissions
- **Assigned User** – CM Portal User designated to process the packet

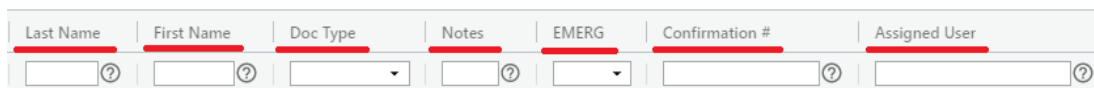
The **horizontal display** shows all data to the far left side of the window when the **Left Arrow**  icon is visible at the top left side of the **Task Bar** above the **Results Grid**.

**Figure 34: Results Grid Columns – Far Left Standard Main Screen View**



Use the **Right**  **Scroll Arrow** on the **Horizontal Scroll Bar** at the bottom of the window to access the remaining columns on each page.

**Figure 35: Results Grid Columns – Far Right Scroll Arrow Screen View**



## 6.2.2 Results Grid Functionality

All Results Grids in the CM Portal have a similar appearance and share common functionality.




### 6.2.2.1 Single-Click Packet Selection

A **single click** anywhere along any row in the **Results Grid** selects that packet (highlighted in blue) for processing and subsequently opens the **Task Bar** above the Results Grid. Click a **blue button** on the Task Bar to choose an action and proceed.

### 6.2.2.2 Double-Click Packet Opening

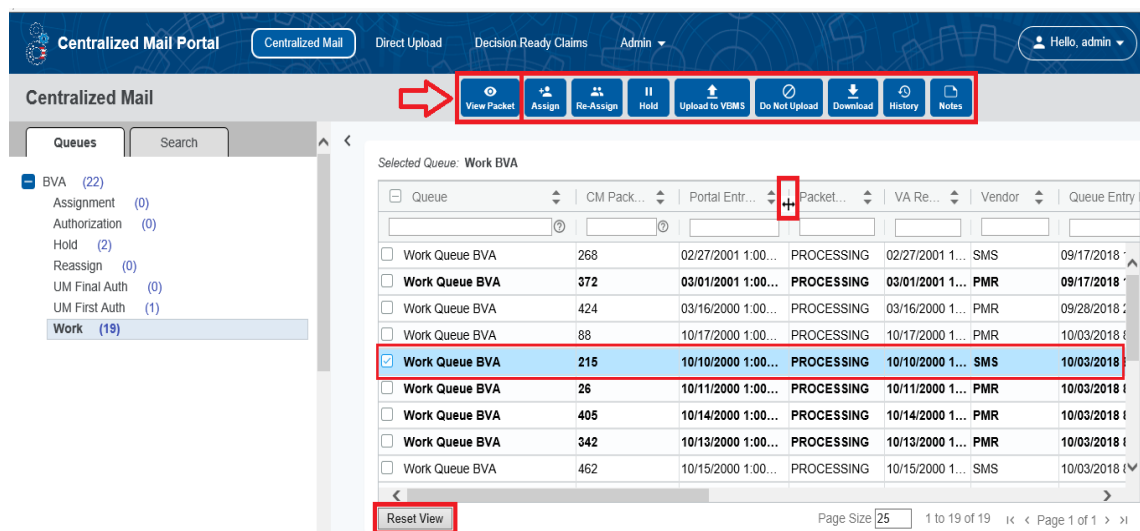
A **double click** anywhere along any row in the **Results Grid** automatically opens the selected packet in the **Packet Detail** screen (Section 7).

### 6.2.2.3 Column Resizing

Position the arrow cursor on the column header dividing line on the right side of any column. The cursor changes to the **Column Resize Arrow**  icon. Hold the left mouse button down and drag the arrow to the left or right to resize the column to the desired width.

All user-defined column settings are retained each time the **Results Grid** is displayed, even after logging out of the CM Portal. To restore the default column size, select the **Reset View** button on the left side of the **Status Bar** at the bottom of the page.


Figure 36: Results Grid Functionality



Queue	CM Pack...	Portal Entr...	Packet...	VA Re...	Vendor	Queue Entry
<input type="checkbox"/> Work Queue BVA	268	02/27/2001 1:00...	PROCESSING	02/27/2001 1...	SMS	09/17/2018
<input type="checkbox"/> Work Queue BVA	372	03/01/2001 1:00...	PROCESSING	03/01/2001 1...	PMR	09/17/2018
<input type="checkbox"/> Work Queue BVA	424	03/16/2000 1:00...	PROCESSING	03/16/2000 1...	PMR	09/28/2018
<input type="checkbox"/> Work Queue BVA	88	10/17/2000 1:00...	PROCESSING	10/17/2000 1...	PMR	10/03/2018
<input checked="" type="checkbox"/> Work Queue BVA	215	10/10/2000 1:00...	PROCESSING	10/10/2000 1...	SMS	10/03/2018
<input type="checkbox"/> Work Queue BVA	26	10/11/2000 1:00...	PROCESSING	10/11/2000 1...	PMR	10/03/2018
<input type="checkbox"/> Work Queue BVA	405	10/14/2000 1:00...	PROCESSING	10/14/2000 1...	PMR	10/03/2018
<input type="checkbox"/> Work Queue BVA	342	10/13/2000 1:00...	PROCESSING	10/13/2000 1...	PMR	10/03/2018
<input type="checkbox"/> Work Queue BVA	462	10/15/2000 1:00...	PROCESSING	10/15/2000 1...	SMS	10/03/2018

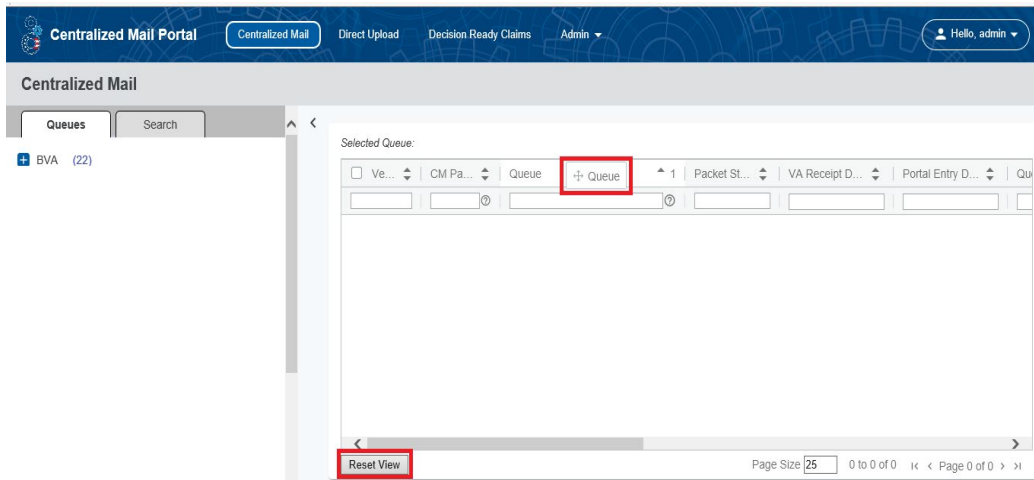
### 6.2.2.4 Column Reordering

All columns in the **Results Grid** can be placed in any order to suit personal preference using these steps:

- Place the cursor in the header for that column and hold down the left mouse button.
- Drag the cursor slightly to the left or right until the **4-direction Arrow**  icon appears in a mobile, white box with the column name.
- Move the white box to the desired location in the column header row and release the left mouse button to move the entire column to that location. Repeat these steps to achieve the desired column order.

The system retains user-defined column order settings each time the **Results Grid** is displayed, even after logging out of the CM Portal. To restore the default column order, select the **Reset View** button on the left side of the **Status Bar** at the bottom of the page.

Figure 37: Column Reordering



### 6.2.2.5 Results Grid Sorting

Each column header contains **Upward** ↑ and **Downward** ↓ **Sorting Arrow** icons on the right side of the column name that arrange all the **Results Grid** rows based on the content order selected for that column.

The **Upward Sorting Arrow** ↑ organizes the column contents with the highest/newest/Z entry first and the lowest/oldest/A entry last. The **Downward Sorting Arrow** ↓ reverses the listing with the lowest/oldest/A entry first and the highest/newest/Z entry last.

Click immediately after the column name (right side) to reveal the **Upward** ↑ and **Downward** ↓ **Sorting Arrow** icons in this order with each sequential click: **Downward**, **Upward**, none. The **Results Grid** rows automatically reconfigure based on the column order selection.

Figure 38: Upward and Downward Sorting Arrows

CM Packet # ↑	CM Packet # ↓
<input type="text"/>	<input type="text"/>
40 <b>Highest/Newest</b>	22 <b>Lowest/Oldest</b>
36 <b>Letter Z</b>	23 <b>Letter A</b>
35	24
34 <b>↑</b>	25
32	26 <b>↓</b>
31	28
29 <b>Upward</b>	29 <b>Downward</b>
28 <b>Letter A</b>	31 <b>Letter Z</b>
26 <b>Lowest/Oldest</b>	32 <b>Highest/Newest</b>

Sort the **Results Grid** rows by arranging the contents in ascending or descending order in only one (1) column or multiple columns. The **Sort Level Number** on the left side of the column sorting arrows indicates the sort order in which the data is arranged.

In the figure below, the **Queue** column is sorted first in alphabetical order (downward). Based on that organization, the information is then sorted by **Vendor** in reverse alphabetical order (upward) for the second-level sort. Finally, the results are sorted by **CM Packet Number** from lowest to highest (downward) on the third level.

**Figure 39: Results Grid Sorting Example**

<input type="checkbox"/> Queue <b>1</b> ↓	Vendor <b>2</b> ↑	CM Packet # <b>3</b> ↓
<input type="checkbox"/> Assignment Queue Albuquerque	SMS	209
<input type="checkbox"/> Assignment Queue Albuquerque	SMS	1506
<input type="checkbox"/> Assignment Queue Albuquerque	SMS	1555
<input type="checkbox"/> Assignment Queue Albuquerque	SMS	1563

Date columns are sorted based on the event date and corresponding time stamp. Multiple packets with the same event date are organized in either ascending or descending order by time of occurrence for the primary sort. The time is not displayed.

When multiple date columns are used to sort the **Results Grid** rows, the primary sort in the first date column dictates the parameters within which secondary and tertiary date sorting are conducted.

For example, the **VA Receipt Date** column is sorted first from oldest to newest (downward). Based on those results, packets are then sorted by **Portal Entry Date** from oldest to newest (downward) for the second-level sort and **Queue Entry Date** from oldest to newest (downward) on the third level. **VA Receipt Date** is the primary sort, so **Portal Entry Date** and **Queue Entry Date** results are listed accordingly and may be unordered based on the associated **VA Receipt Date**.

**Figure 40: Results Grid Date Sorting Example – Multiple Columns**

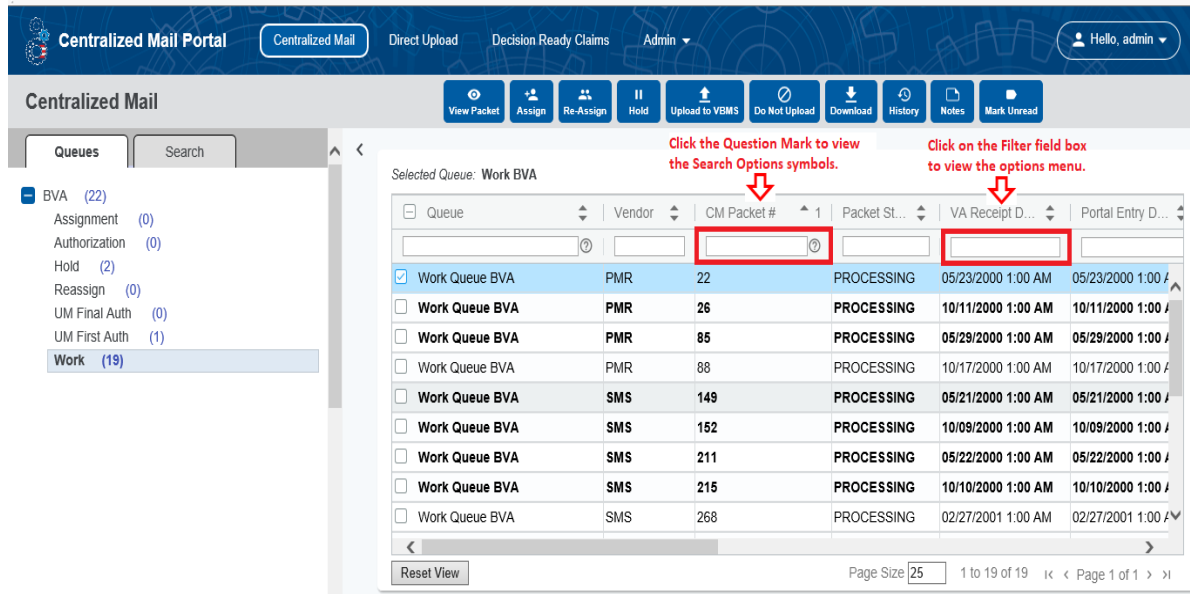
VA Receipt Date <b>1</b> ↓	Portal Entry Date <b>2</b> ↓	Queue Entry Date <b>3</b> ↓
01/01/2019	07/22/2019	07/22/2019
01/01/2019	07/24/2019	07/24/2019
01/01/2019	07/24/2019	07/24/2019
01/01/2019	08/15/2019	08/15/2019
01/01/2019	08/15/2019	08/15/2019
01/14/2019	01/14/2019	01/21/2019
02/04/2019	02/23/2019	02/23/2019
02/07/2019	02/08/2019	02/12/2019
02/07/2019	02/08/2019	02/12/2019

### 6.2.2.6 Results Grid Filtering

All columns in the **Results Grid** have a **Filter** field beneath the column name to identify results that meet certain parameters. Filtering options are dependent upon the type of data in the column.

Place the cursor in the **Filter** field box and left click on the mouse or the **Down Arrow** to view the options menu, or click the **Question Mark** (?) icon on the right side of the field box to view the **Search Options** symbols list. The ✕ icon closes the **Search Options** window.

Figure 41: Results Grid Filter Field

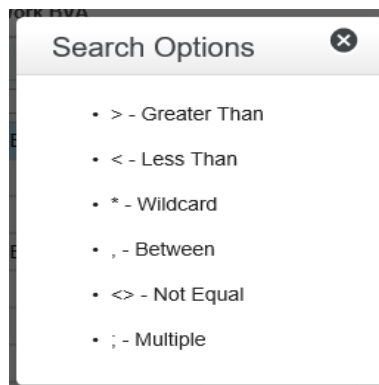


6.2.2.6.1 Search Options Symbols

The **Search Options** symbols appear when clicking the **Question Mark** (?) icon. Use these symbols to define the search results for numerical or text values in any column by entering the symbol (no space before or after) with the search parameter in the **Filter** field box. The **Results Grid** filters and displays only rows that match the specified parameter(s). Highlight and delete the search parameter, click the **X** icon on the right side of the field, or clear any checkbox to remove the current entry and return all rows to the **Results Grid**.

For text values in name and notes columns, use the **Wildcard** character \* after the letters with no extra space to find all text that begins with those letters. If the **Wildcard** character \* is placed before the letters, the filter displays all results with those letters in the text. Text is not case-sensitive.

Figure 42: Search Options Symbols



The following examples explain how to use the **Search Options** symbols:

- **> Greater Than** – “>200” filters results showing only rows where the column contents are greater than 200. “>L” filters results showing only text starting with the letter M.
- **< Less Than** – “<100” filters results showing only rows where the column contents are less than 100.

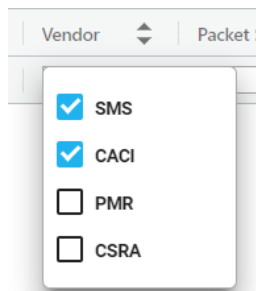
- \* **Wildcard** – “Smi\*” filters results showing only rows where the column contents begin with “Smi”, whereas “\*as” returns all results in the column containing “as”.
- , **Between** – “1,10” filters results showing only rows where the column contents are between 1 and 10. “A,K” filters results showing only text starting with letters between A and K.
- <> **Not Equal** – “<>5” filters results showing only rows where the column contents do not equal 5.
- ; **Multiple** – “1;4;8” filters results showing only rows where the column contents are 1 or 4 or 8.

**6.2.2.6.2 Filter Field Options Menus**

**Options menus** display a list of choices to specify filter criteria. Place the cursor in the **Filter** field box and left click on the mouse or the **Down Arrow** to view the options menu. One or more options can be selected by marking the checkbox. The **Results Grid** filters and displays only rows that match the specified criteria. Click anywhere in the **Results Grid** to close the menu.

The white **X** icon on the right side of the **Filter** field box deletes the search parameter(s) and returns all rows to the **Results Grid**, except in a date field. Select the **Any** button in a date field to clear the search parameter(s) and return all rows to the **Results Grid**.

**Figure 43: Vendor Options Menu**



**Figure 44: Delete Search Parameters Using the X Icon**

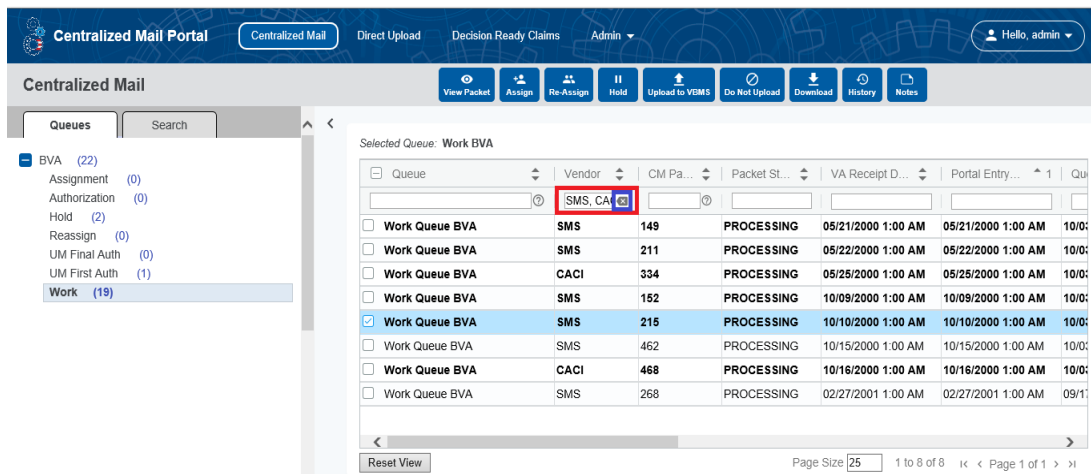
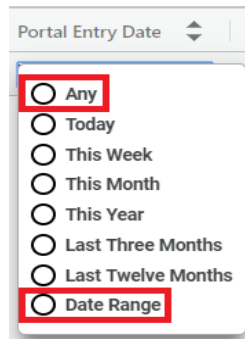
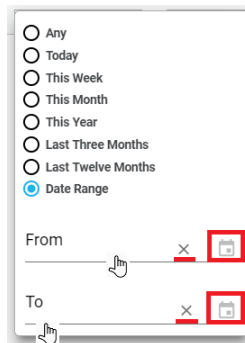


Figure 45: Date Options Menu



Selecting **Date Range** from the date options menu offers a calendar selector to choose the correct dates.

Figure 46: Date Range with Calendar Selectors




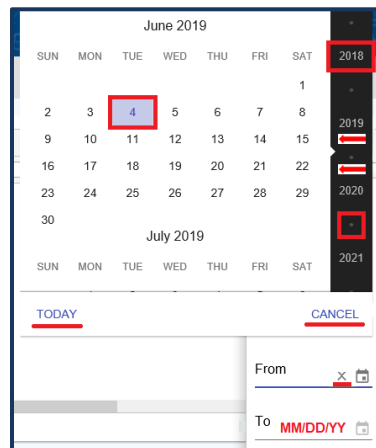
Click the **Calendar**  icon or anywhere in the **From** and **To** fields to open the calendar selector, which highlights the current date.

Figure 47: Calendar Selector



**TODAY** populates the current date into the field. Clicking on any date shown in the calendar selects the date chosen. Manually enter the dates in the **MM/DD/YY** (two-digit **Month**/two-digit **Day**/two-digit **Year**) format. The **X** icon on the right side of the field deletes the entry. **CANCEL** stops the action and exits the calendar selector.

Navigate through the years and months using the black **Date Bar** on the right side of the calendar:

- Click the year shown at the top of the **Date Bar** to reveal previous years or the year shown at the bottom of the **Date Bar** to expose future years. January is displayed when any year is designated.
- Position the cursor directly above or below the white notch and remain stationary while clicking to advance the calendar month by month. Adjust the cursor location accordingly to achieve the desired advancement level.
- Position the cursor above or below and farther away from the white notch, while remaining stationary and clicking, to advance the calendar through several months. Adjust the cursor location accordingly to achieve the desired advancement level.
- The gray **Dot** between years displays July for the year above it.

**Figure 48: Date Bar Navigation**



Once dates are selected for the **From** and **To** fields, the **Results Grid** filters and displays only rows that match the specified **Date Range**. Click anywhere in the **Results Grid** to close the menu.

Select the **Any** button in a date field to clear the search parameter(s) and return all rows to the **Results Grid**.

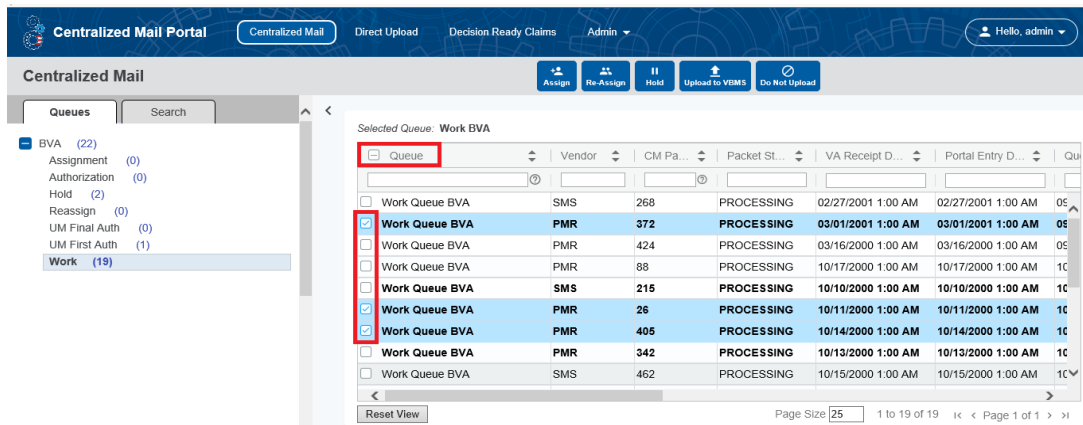
### 6.2.2.7 Selecting Rows

To select one row for processing, click anywhere along the desired row in the **Results Grid**. Select multiple rows by holding the **Ctrl** key down on the keyboard while clicking the left mouse button anywhere along the desired rows.

Select all rows in the **Results Grid** by marking the checkbox on the left side of the first column header.

Any selected row has a blue checkmark and is highlighted in blue. Deselect a row by clicking anywhere along the desired row in the **Results Grid**. Holding the **Ctrl** key down on the keyboard while clicking the left mouse button anywhere along desired rows deselects multiple rows. Remove the checkmark from the box on the left side of the first column header to deselect all rows.

Figure 49: Selecting Rows



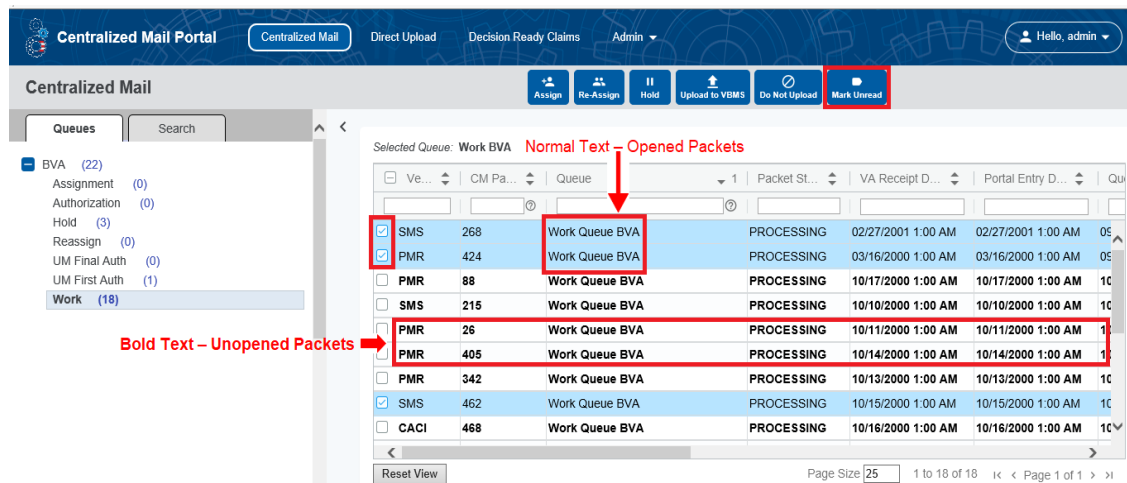
### 6.2.2.8 Packet Phase Indicator – Opened versus Unopened

To indicate packet phase, unopened packets are displayed in **bold** text, while opened packets are displayed in normal style text.

This functionality is specific to **User** and **Queue**. If you open a packet in your Work Queue, the text changes from **bold** to normal and remains that way while it is in that Queue. If the packet is transferred to your Hold Queue, it appears in **bold** text until it is opened there. An opened packet from one User that is assigned to a new User is displayed in **bold** text in the new User’s Queue until it is opened by the new User.

Change the phase of a packet from opened to unopened by selecting the row and clicking the **Mark Unread** button on the **Task Bar**, which changes the text back to **bold**.

Figure 50: Opened and Unopened Packet Phase Indicator

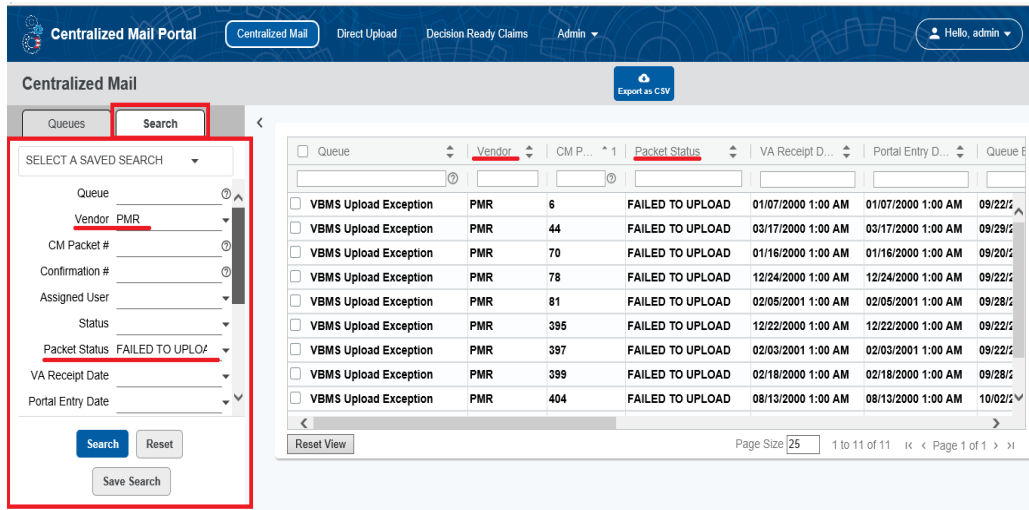


## 6.3 Search for a Packet

The **Search Tab** is on the right side of the **Queues Tab** on the left side of the screen under Centralized Mail. The **Search** function retrieves all packets within the CM Portal that are not restricted (regardless of processing status, User assignment, or Location) and match specific search criteria.

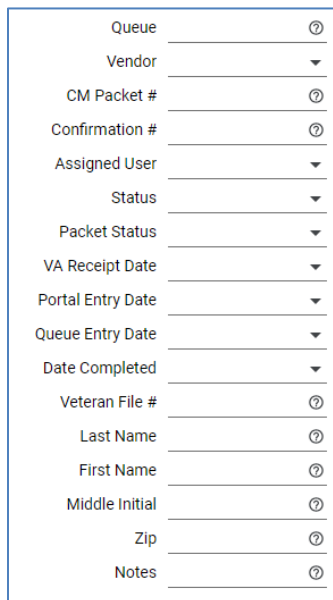


Figure 51: Search Tab



Search criteria are shown in the figure below. Click the **Question Mark** (?) icon to display the **Search Options** symbols. Fields with **Down Arrows** have an options menu. Use the **Vertical Scroll Bar** to view the entire search criteria list.

Figure 52: Search Criteria

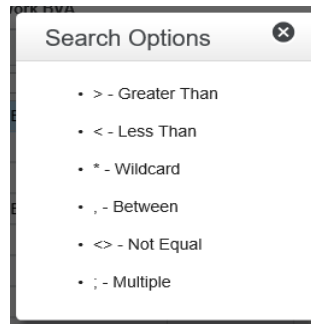


### 6.3.1 Search Criteria

Click the **Question Mark** (?) icon to display the **Search Options** symbols. Use these symbols to define the search results for numerical or text values by entering the symbol (no space before or after) with the search parameter for the chosen criteria. The **X** icon closes the **Search Options** window.

For text values in name and notes fields, use the **Wildcard** character \* after the letters with no extra space to find all text that begins with those letters. If the **Wildcard** character \* is placed before the letters, all results with those letters in the text display. Text is not case-sensitive.

Figure 53: Search Options Symbols



The following examples explain how to use the **Search Options** symbols:

- **> Greater Than** – “>200” filters results showing only rows where the column contents are greater than 200. “>L” filters results showing only text starting with the letter M.
- **< Less Than** – “<100” filters results showing only rows where the column contents are less than 100.
- **\* Wildcard** – “Smi\*” filters results showing only rows where the column contents begin with “Smi”, whereas “\*as” returns all results in the column containing “as”.
- **, Between** – “1,10” filters results showing only rows where the column contents are between 1 and 10. “A,K” filters results showing only text starting with letters between A and K.
- **<> Not Equal** – “<>5” filters results showing only rows where the column contents do not equal 5.
- **; Multiple** – “1;4;8” filters results showing only rows where the column contents are 1 or 4 or 8.

**Down Arrows** reveal the options menus that display a list of choices to specify search criteria. Mark the checkbox to select one or more options. Refer to [Section 6.2.2.6.2](#) for instructions on selecting a **Date Range** using the calendar selector. Click anywhere in the **Results Grid** to close the menu.

Specify at least one (1) search criterion in any field to execute the search. Click the **Search** button to view all results matching the designated criteria.

The **Reset** button clears the contents in all criteria fields to begin another search. The **Results Grid** retains information from the previous search until a new search is performed or your CM Portal session ends.

Figure 54: Search, Reset, and Save Search Buttons

### 6.3.2 Save a Search


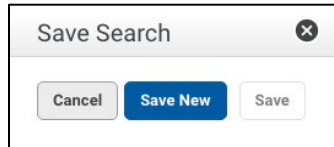
After retrieving the search results, select the **Save Search** button below **Search** and **Reset** to save a set of search criteria for a frequently performed search. The **Save Search** window appears. The **Cancel** button or the  icon stops the action and exits the window, if not saving the search.

Figure 55: Save Search Window



The **Save New** button names the new search for retrieval later or saves an existing **Saved Search** under a new name, with or without new search criteria.


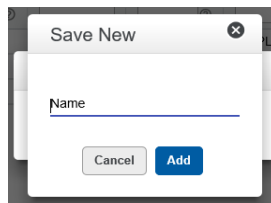
Click the **Add** button to archive the new search in the **Saved Search** file. The **Cancel** button or the  icon exits the save search action.

Figure 56: Save New Search Window

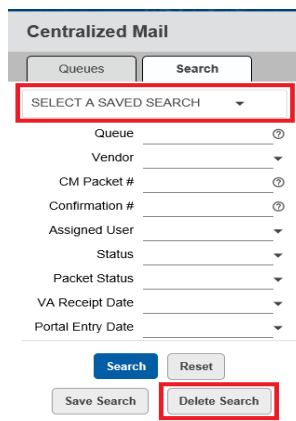


The **Save** button is activated only when using a previous **Saved Search**. This enables adjusting the search criteria as necessary using the same **Saved Search** name.

### 6.3.3 Select a Saved Search

To locate a **Saved Search**, use the **Select A Saved Search** options menu at the top of the **Search Tab**. Click on the desired Search name. Search criteria populate automatically into their respective fields, the search is conducted, and the affiliated packets are displayed on the **Results Grid**.

Figure 57: Select a Saved Search Options Menu



### 6.3.4 Delete a Search

The **Delete Search** button (below **Search** and **Reset** on the right side of **Save Search**) is enabled to remove the current saved search from the **Select A Saved Search** options menu. Highlight the desired Search name in the options menu and click the **Delete Search** button to remove the search.

### 6.3.5 Export as CSV Option

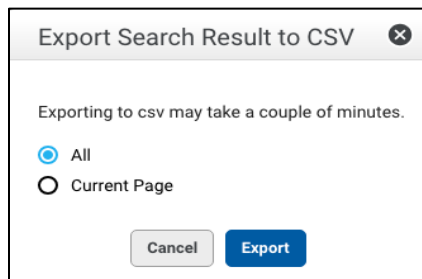
The **Export as CSV** option defines the number of returned results and the results page(s) by creating a comma-separated value (CSV) file to transfer data into a spreadsheet format. This feature is only available on the **Search Tab** and located on the **Task Bar** at the top of the screen.

Figure 58: Export as CSV Button



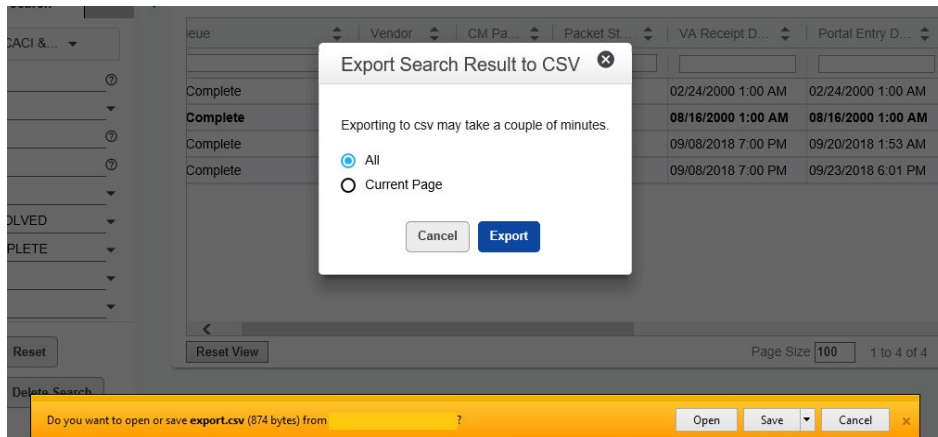
Click the **Export as CSV** button to activate the **Export Search Result to CSV** window. Select **All** to export all results pages or select **Current Page** to export results from that page only.

Figure 59: Export Search Result to CSV Window



The **Cancel** button or the **✕** icon terminates the export process and exits the window. The **Export** button begins the CSV file transfer by giving the option to **Open**, **Save**, or **Cancel** the file. The downloaded CSV file opens as a Microsoft Excel spreadsheet.

Figure 60: Confirm or Cancel CSV Export File



## 6.4 Mail Packet Status Values

There are two (2) **Status Values** that indicate the current state of a packet:

- **Overall Status – Resolved or Unresolved:**
  - **Resolved** indicates that processing has ceased and no further action is required, unless the **COR** determines that a **Retrigger** action is necessary.
  - **Unresolved** means that work is still pending on the packet.
- **Packet Status** – more defined level below **Overall Status** that indicates the processing stage in the workflow

Table 2 describes both types of **Status Values**.

**Table 2: Packet Status Value Descriptions**

Overall Status	Packet Status	Description
Resolved	Complete	The packet has been uploaded to the VBMS.
	UM Confirmed	The packet has been marked as Unidentified Mail.
	Rescan Confirmed	All approvals for a Rescan request are complete.
	Split Confirmed	All approvals for a Split request are complete.
	Do Not Upload	The packet has been manually marked as “Do Not Upload” and prevented from being sent to the VBMS.
Unresolved	Processing	This is the default status for a packet, which indicates that action is being taken.
	Split Pending	A Split request is waiting for approval by an authorized user (e.g., Supervisor).
	Rescan Pending	A Rescan request is waiting for approval by an authorized user (e.g., Supervisor).
	Rescan Pending Final	A Rescan request is waiting for approval from a COR.
	UM Pending	An Unidentified Mail packet is waiting for approval by an authorized user (e.g., Supervisor).
	UM Final	An Unidentified Mail packet is waiting for approval from an RMO or a COR.
	Pending Upload	A request to upload to the VBMS is pending.
	Failed to Upload	An upload to the VBMS was unsuccessful.

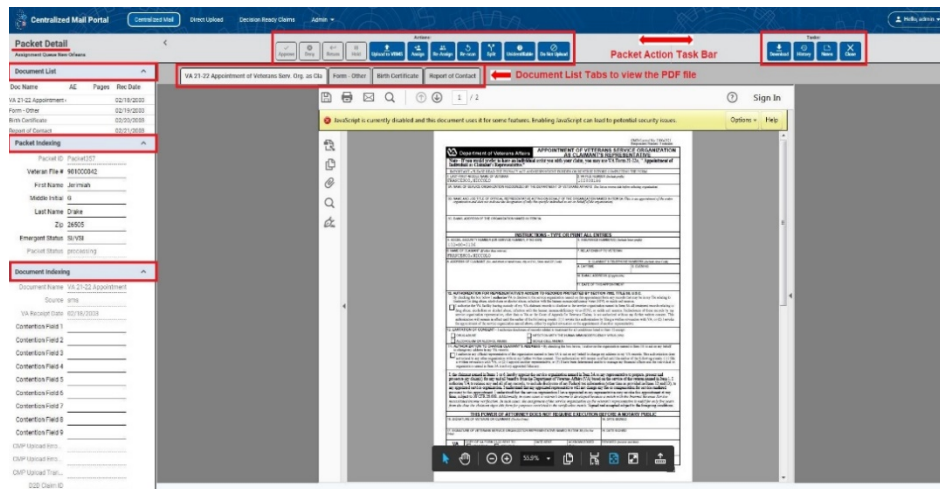
## 7 CM Packet Detail Screen

The **Packet Detail** screen displays complete information for a single mail packet. The main menu options are located on the left side of the screen:

- **Document List** – each document in the packet including a Portable Document Format (PDF) image file
- **Packet Indexing** – basic packet information such as Packet Number, File Number, and Veteran Name
- **Document Indexing** – basic document information such as Document Name, Source, and VA Receipt Date

All Veteran information shown in any screenshot is created for testing and not actual Veteran data, to protect Personally Identifiable Information (PII).

Figure 61: Packet Detail Window



### 7.1 Open a Mail Packet in the Packet Detail Screen

There are three (3) ways to open a packet in the **Packet Detail** screen from the **Results Grid** on either the **Queues** or **Search Tabs**:

- A double click anywhere along any row in the **Results Grid** automatically opens the selected packet.
- Select the row by marking the checkbox on the left side of the first column and clicking the **View Packet** button on the **Task Bar**.
- Click on the **Packet Count** number in the **Queue Hierarchy** on the **Queues Tab** to initiate **Automatic Mode** for the associated Location/Queue (Section 7.4).

The **Queue** and **Location** in which the packet currently resides are displayed in the upper left corner of the screen under **Packet Detail**.

Figure 62: Packet Detail Queue and Location Information



## 7.2 Packet Detail Menu

Certain fields in the **Document/Packet List** and **Indexing** menus on the left side of the screen can be modified. Fields shown in gray text are not editable. All fields shown in black text can be updated.

The vertical display can be expanded or contracted using the **Up** and **Down Arrows** and the **Vertical Scroll Bar**. The **Document/Packet List** and **Indexing** menus retain the extended or collapsed setting for each section based on the last packet viewed, when you reopen the **Packet Details** screen for a new packet during your current session.

Click the **Close** button on the **Task Bar** to exit the **Packet Detail** screen and save any changes made to the **Packet Detail** information. Select **Yes** to proceed with saving or **No** to discard all entries.

Figure 63: Editing Document/Packet List and Indexing Fields

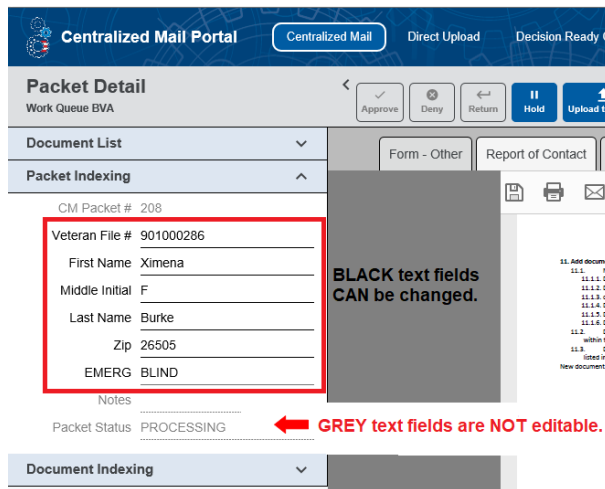
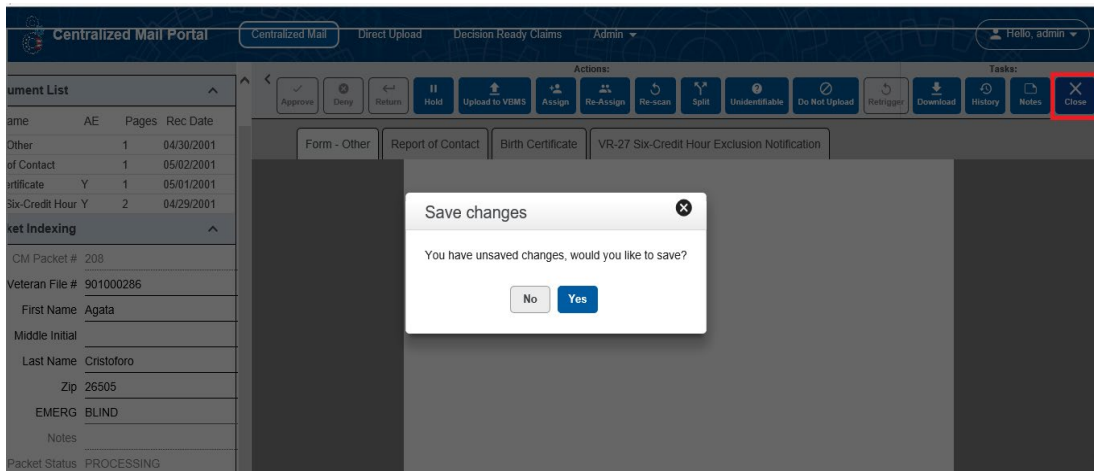


Figure 64: Save Changes for Document/Packet List and Indexing



### 7.2.1 Document List

The **Document List** contains all documents included in the packet with the total number of pages per item and date received. **AE** indicates whether the document was created as part of the AutoEstablish/AutoCEST process.

The first document on the **Document List** is displayed by default. Click on any name in the list to view another document or select a **Document List Tab** above the viewing screen. When a document is selected, the corresponding **Document List Tab** is highlighted to reflect the current document shown.

Figure 65: Document List

Packet Detail			
Work Queue Boise			
Document List			
Doc Name	AE	Pages	Rec Date
Form - Other		1	07/06/2004
VA 21-526 Veterans Apj		2	07/05/2004
Birth Certificate		2	07/07/2004
Report of Contact		1	07/08/2004

Figure 66: Document List Tabs



### 7.2.2 Packet Indexing

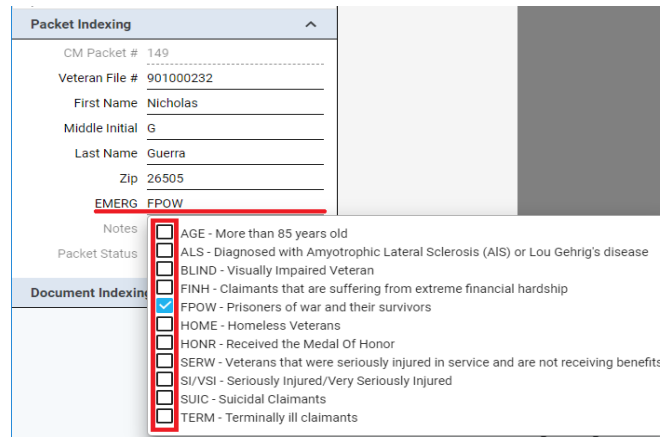
**Packet Indexing** appears beneath the **Document List**.

Claims for emergent situations (e.g., serious illness, financial hardship, or advanced age of 85 years or older) require priority processing. To identify an emergent claim, click on the **EMERG** field and select one or more categories from the options menu by marking the checkbox. Click anywhere in the gray area on the right side of **Packet Indexing** to close the menu. The claim categories appear in the **EMERG** field.

Figure 67: Packet Indexing Fields



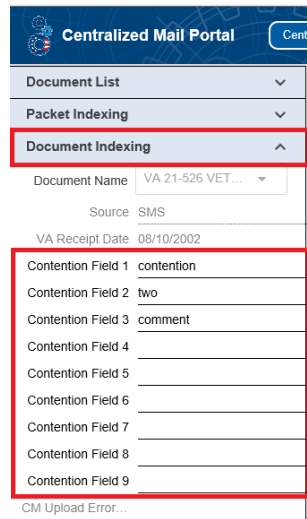
**Figure 68: Emergent Situations Options Menu**



### 7.2.3 Document Indexing

**Document Indexing** appears beneath **Packet Indexing**. Enter various claimant conditions and issues in the **Contention Fields**.

**Figure 69: Document Indexing Fields**



### 7.2.4 Document Viewer

The **Document Viewer** displays the selected document from the **Document List** or **Document List Tabs** using **Adobe Acrobat Reader** software, which must be installed on your computer.

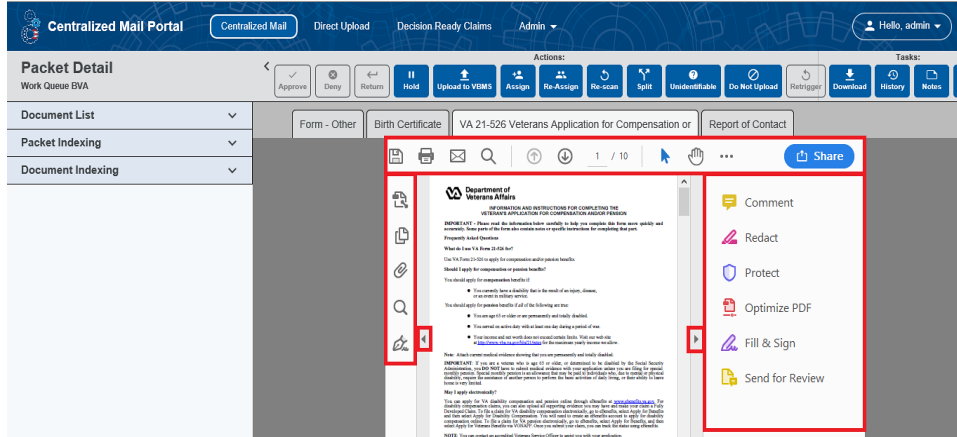
Depending on which version of Adobe Acrobat Reader is installed, you may see a document without any Task Bar. If this occurs, move the cursor to the top of the document and hover it there until the abbreviated **Task Bar** appears. Click on the **Adobe logo** on the far right side of the **Task Bar** to enable and display the entire **Task Bar** and **Menu**.

**Figure 70: Adobe Acrobat Reader Abbreviated Task Bar**



The **Left Arrow** < and **Right Arrow** > icons on either side of the document hide or reveal the **Menu** and **side Task Bar**.

Figure 71: Adobe Acrobat Reader Task Bar and Menu



7.2.4.1 Document Viewer Controls

Hover over any icon on the **Task Bar** for a brief explanation of its function.

The **Arrow** icon on the right side of the **top Task Bar** selects text and images. The **Hand** icon (on the right side of the Arrow) browses the document and positions the cursor. Click and hold the left mouse button while using the **Hand** icon to move the document around in the viewing screen.

Figure 72: Arrow and Hand Icons



There are two (2) ways to adjust the **Zoom** level for the document:

- **Keyboard and Mouse** – hold the **Ctrl** key down on the keyboard and roll the mouse wheel forward or backward.
- **Undock the Page Controls** – click the **3-Dots** ... icon (on the right side of the **Hand**) on the **top Task Bar** to reveal the drop-down menu. Select **Undock Page Controls** to release and display a **mobile Task Bar** with various **Page Control** functions that appears at the bottom of the screen. The **Task Bar** disappears once other activities are performed. Simply hover the cursor at the bottom of the screen and it reappears. Redock the **Page Controls** by clicking on the **Dot and Up Arrow** icon on the far right end of the **Task Bar**.

Zoom in or out using the **Plus** + or **Minus** - icons.

Set the zoom to a specific percentage using the **Down Arrow Box**.

Figure 73: 3-Dots Icon to Undock the Page Controls

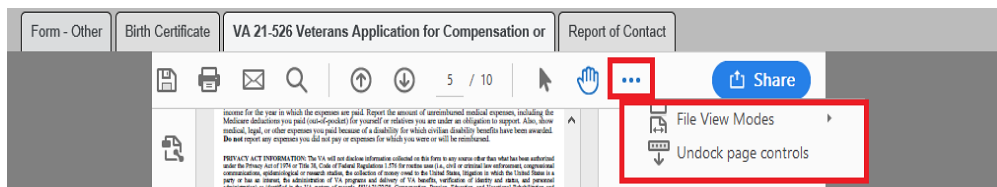
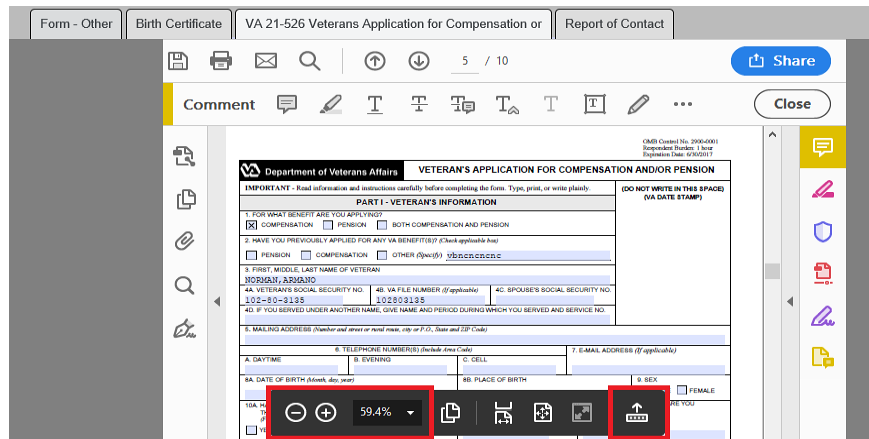


Figure 74: Undock Page Controls Mobile Task Bar



Navigate through the document pages in four (4) ways:




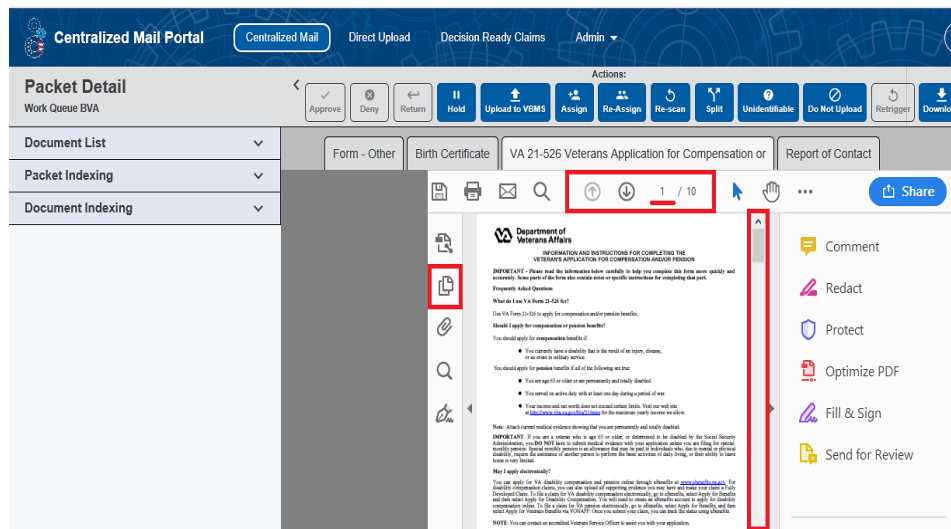
- Use the **Next Page Arrow**  or **Previous Page Arrow**  icons on the top **Task Bar**.
- Enter a specific page number in the **Page Number** field on the right side of the **Page Arrows** and press the **Enter** key on the keyboard.
- Use the **Vertical Scroll Bar** on the right side of the document.
- Click the **Page Thumbnails**  icon on the left **Task Bar** and select a particular page.

Figure 75: Page Navigation Options



### 7.3 Packet Actions Task Bar

The **Packet Actions Task Bar** at the top of any screen displays a set of buttons that allows various **Actions** or **Tasks** on the selected packet(s) at the packet level (not the document level). **Packet Actions** change a packet's status, whereas **Tasks** are functions that do not.

The displayed buttons vary depending on the screen, number of rows chosen, **User Role**, **Queue**, and current state of the packet (completed versus in-progress).

Blue buttons are enabled and execute functions, while gray buttons are inoperative and cannot be selected.

**Action** buttons perform the function and return to the **Results Grid** on the **Queues Tab**. **Task** buttons require using the **Close** button, which returns to the **Results Grid** on the **Queues Tab**.


**Figure 76: Packet Actions Task Bar Example – Queues and Search Tabs**



**Figure 77: Packet Actions Task Bar Example – Packet Detail Screen**



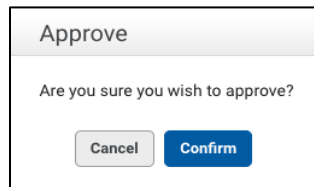
### 7.3.1 Approve Button

The **Approve**  button permits a request made by another user, such as:

- Request to Split a mail packet
- Request to Rescan a mail packet
- Request to mark a mail packet as Unidentified Mail

The **Confirm** button completes the approval, while the **Cancel** button stops the action and exits the window.

**Figure 78: Approve Window**



The **Approve** action occurs in the following **Queues**:

- Authorization
- COR Authorization
- UM First Authorization
- UM Final Authorization

**Super Users** and **Supervisors** can **Approve** packets that are in the **Authorization Queue** with a status of **Split Pending**. After the **Approve** action is complete, the packet moves to **Split Confirmed** status and is sent back to the Vendor for splitting.

**Super Users** and **Supervisors** can **Approve** packets that are in the **Authorization Queue** with a status of **Rescan Pending**. After the **Approve** action is complete, the packet moves to the **COR Authorization Queue**.

**Supervisors** can **Approve** packets that are in the **UM First Authorization Queue**. After the **Approve** action is complete, the packet moves to the **UM Final Authorization Queue**.

A **COR** or an **RMO** can **Approve** packets that are in the **UM Final Authorization Queue**. After the **Approve** action is complete, the packet is marked as **Complete** and removed from the workflow.

A **COR** can **Approve** packets that are in the **COR Authorization Queue** with a status of **Rescan Pending**. After the **Approve** action is complete, the packet moves to **Rescan Confirmed** status and is sent back to the Vendor for scanning.

### 7.3.2 Deny Button

The **Deny**  button denies a request made by another user, such as:

- Request to Split a mail packet
- Request to Rescan a mail packet
- Request to mark a mail packet as Unidentified Mail

The **Confirm** button completes the denial and requires a denial reason, while the **Cancel** button stops the action and exits the window.

**Figure 79: Deny Window**



The **Deny** action occurs in the following **Queues**:

- Authorization
- COR Authorization
- UM First Authorization
- UM Final Authorization

If a packet is in the **Authorization** or **UM First Authorization Queue**, a **Deny** action moves the packet back to the **Work Queue** of the requesting User (if still a valid user). If the requestor is no longer a valid User, the packet is placed in the **Assignment Queue** at the **Location** where the packet resides.

Packets in the **UM Final Authorization Queue** move to the **UM First Authorization Queue**.

Packets in the **COR Authorization Queue** move to the **Authorization Queue**.

**Super Users** and **Supervisors** can **Deny** packets in the **Authorization Queue** with a status of either **Split Pending** or **Rescan Pending**.

**Supervisors** can **Deny** packets in the **UM First Authorization Queue**.

A **COR** or an **RMO** can **Deny** packets in the **UM Final Authorization Queue**.

A **COR** can **Deny** packets in the **COR Authorization Queue** with a status of **Rescan Pending**.

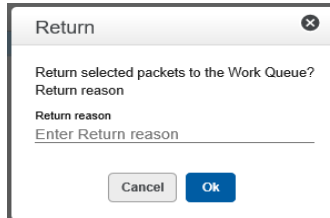
### 7.3.3 Return Button



The **Return** button sends a packet back to a User's **Work Queue**.

The **OK** button completes the return and requires a return reason, while the **Cancel** button stops the action and exits the window.

**Figure 80: Return Window**



The **Return** action occurs in the following **Queues**:

- Hold
- Reassign

If a packet is in the **Hold Queue**, a **Return** action moves the packet back to the **Work Queue** of the requesting User (if still a valid user). If the requestor is no longer a valid User, the packet is placed in the **Assignment Queue** at the **Location** where the packet resides.

If a packet is in the **Reassign Queue**, a **Return** action moves the packet back to the **Work Queue** of the requesting User (if still a valid user). If the requestor is no longer a valid User, the packet is marked as **Reassign Denied** and placed in the **Assignment Queue** at the **Location** where the packet resides.

**Basic Users, Super Users, Supervisors, and a COR** can **Return** packets in the **Hold Queue**.

**Super Users, Supervisors, and a COR** can **Return** packets in the **Reassign Queue**.

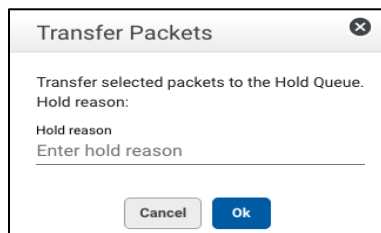
### 7.3.4 Hold Button



The **Hold** button places a packet in a pending status awaiting further investigation.


The **OK** button transfers the packet to the **Hold Queue** and requires a hold reason, while the **Cancel** button stops the action and exits the window.

**Figure 81: Transfer Packets to the Hold Queue Window**



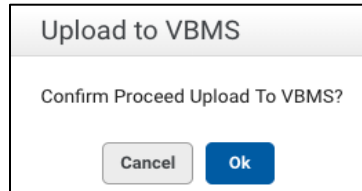
The **Hold** action occurs in the **Work Queue** and transfers packets to the **Hold Queue**. **Basic Users, Super Users, Supervisors, and a COR** can put a packet on **Hold**.

### 7.3.5 Upload to VBMS Button

The **Upload to VBMS**  button transmits the packet(s) to the VBMS.

The **OK** button uploads the packet(s) to the VBMS, while the **Cancel** button stops the action and exits the window.

**Figure 82: Upload to VBMS Window**




The CM Portal attempts to upload the packet(s) to the VBMS, and the status is marked as **Pending Upload**. When the upload succeeds, the packet is marked **Complete** and removed from the workflow. If the upload fails, the packet status changes to **Failed to Upload**.

**Basic Users** can **Upload to VBMS** only from the **Work** and **Hold Queues**.

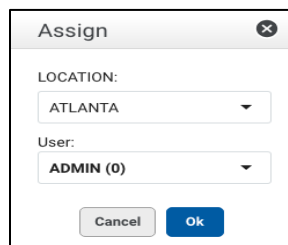
**Super Users, Supervisors,** and a **COR** can **Upload to VBMS** from any **Queue**.

### 7.3.6 Assign Button

The **Assign**  button designates a User, who is usually from the same Location as the packet, to process the packet; however, another Location can be chosen.

The **OK** button completes the assignment and requires a **Location** and **User** appointment, while the **Cancel** button stops the action and exits the window. The number in parenthesis on the right side of the **User** indicates the number of packets in that User's **Work Queue**.

**Figure 83: Assign Window**



The **Assign** action occurs in the following **Queues**:

- Work
- Hold
- Assignment


The **Assign** action moves the packet to the **Work Queue** of the designated User. The packet may be assigned to any User at any Location. If no **Location** selection is made, the system displays only those Users at the **Location** where the packet resides.

**Super Users, Supervisors, and a COR can Assign packets to any User at any Location.**

### 7.3.7 Re-Assign Button

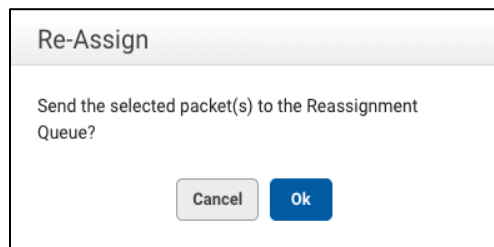
There are two (2) **Re-Assign** actions:

- Send a packet in another Queue (e.g., **Work Queue**) to the **ReAssign Queue**.
- Complete the **Re-Assign** by selecting another User and/or Location to process the packet.

The **Re-Assign**  button initially moves a packet from its original **Queue** to the **ReAssign Queue**.

The **OK** button transfers the packet to the **ReAssign Queue**, while the **Cancel** button stops the action and exits the window.

**Figure 84: Re-Assign Window**




The first **Re-Assign** action occurs in the following **Queues**:

- Work
- Hold

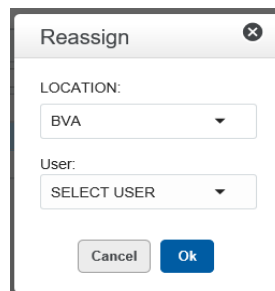
**Basic Users, Super Users, Supervisors, and a COR can send packets to the ReAssign Queue.**

The second **Re-Assign** action happens in the **ReAssign Queue** by selecting another **User** and/or

**Location** to process the packet after clicking the **Re-Assign**  button.

The **OK** button transfers the packet to the chosen **User** and/or **Location**, while the **Cancel** button stops the action and exits the window.


**Figure 85: Reassign to New User/Location Window**



**Super Users, Supervisors, and a COR can Re-Assign packets for processing.**

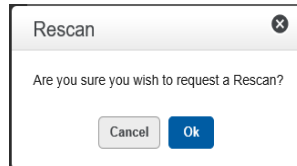


### 7.3.8 Re-Scan Button

The **Re-Scan**  button indicates that the packet is unreadable due to poor scan quality and should be redone by the Vendor.

The **OK** button sends the packet for rescanning, while the **Cancel** button stops the action and exits the window.

**Figure 86: Rescan Window**




The **Re-Scan** action occurs on the **Packet Detail** screen in the following **Queues**:

- Work
- Hold
- Assignment

Once the **Re-Scan** request is made, the packet status changes to **Rescan Pending** and moves to the **Authorization Queue**.

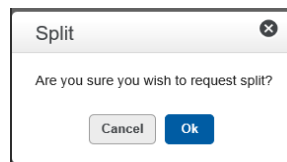
**Basic Users, Super Users, Supervisors,** and a **COR** can request a **Re-Scan**.

### 7.3.9 Split Button

The **Split**  button signals that a packet needs separation by the Vendor, which usually occurs when a packet contains information for multiple Veterans.

The **OK** button sends the packet for splitting, while the **Cancel** button stops the action and exits the window.

**Figure 87: Split Window**




The **Split** action occurs on the **Packet Detail** screen in the following **Queues**:

- Work
- Hold
- Assignment

Once the **Split** request is made, the packet status changes to **Split Pending** and moves to the **Authorization Queue**.

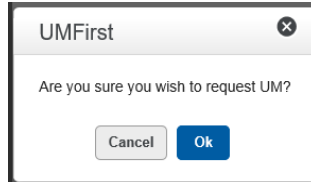
**Basic Users, Super Users, Supervisors,** and a **COR** can request a **Split**.

### 7.3.10 Unidentifiable Button

The **Unidentifiable**  button indicates that a packet lacks enough information for proper processing.

The **OK** button labels the packet as UM, while the **Cancel** button stops the action and exits the window.

**Figure 88: UM First Window**




The **Unidentifiable** action occurs on the **Packet Detail** screen in the following **Queues**:

- Work
- Hold
- Assignment

Once the **Unidentifiable** request is made, the packet status changes to **Unidentified Mail Pending** and moves to the **UM First Authorization Queue**.

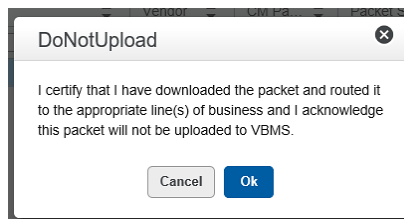
**Basic Users, Super Users, Supervisors,** and a **COR** can mark a packet as **Unidentifiable**.

### 7.3.11 Do Not Upload Button

The **Do Not Upload**  button halts transmission of a packet to the VBMS.

The **OK** button confirms the **Do Not Upload** command, while the **Cancel** button stops the action and exits the window.

**Figure 89: Do Not Upload Window**




The **Do Not Upload** action occurs in the following **Queues**:

- Work
- Hold
- Assignment

The **Do Not Upload** action removes the packet from the workflow and no further processing is conducted.

**Basic Users, Super Users, Supervisors,** and a **COR** can execute a **Do Not Upload** conclusion.

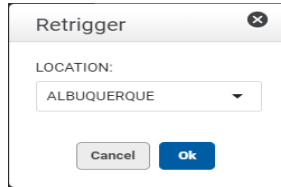
### 7.3.12 Retrigger Button

The **Retrigger**  button (accessed only by a **COR**) initiates another round of workflow processing on completed packets, which are outside of the standard **Queues**.

One (1) or more completed packets can be selected for **Retrigger** processing:

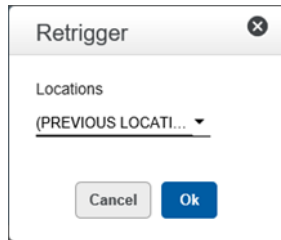
- When one (1) packet is selected, the **Location** field defaults to the last Location where the **Packet Status** became **Complete**.

**Figure 90: Retrigger Window – One Packet**



- When multiple packets are selected, the **Location** field defaults to **Previous Locations**, which sends each packet respectively to the last Location where the **Packet Status** became **Complete**.

**Figure 91: Retrigger Window – Multiple Packets**




The **Location** designation can be changed to any other single **Location** for either one (1) packet or a group of packets.


The **OK** button confirms the **Retrigger** command and **Location** appointment, while the **Cancel** button stops the action and exits the window.

The **Retrigger** action moves the packet to the **Assignment Queue** for the designated **Location**.

### 7.3.13 Download Button

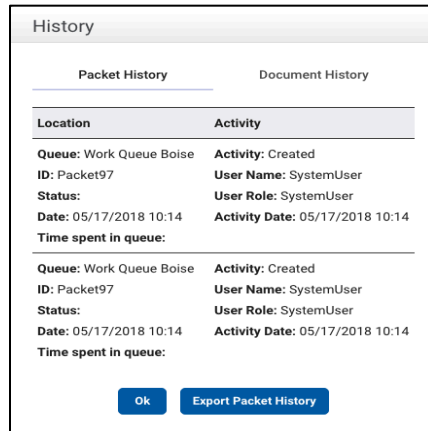
The **Download**  button transfers a copy of the selected mail packet(s) in a ZIP file to your computer. This **Task** may be performed by all **Users** in any **Queue**.

### 7.3.14 History Button



The **History**  button shows the entire record of activity and information for the packet at the packet and document levels. This **Task** may be performed by all **Users** in any **Queue**.

The **OK** button closes the window. The **Export Packet History** option creates a comma-separated value (CSV) file to transfer data into a spreadsheet format. The **CSV** file transfer provides the option to **Open**, **Save**, or **Cancel** the file. The downloaded CSV file opens as a Microsoft Excel spreadsheet.

**Figure 92: History Window**

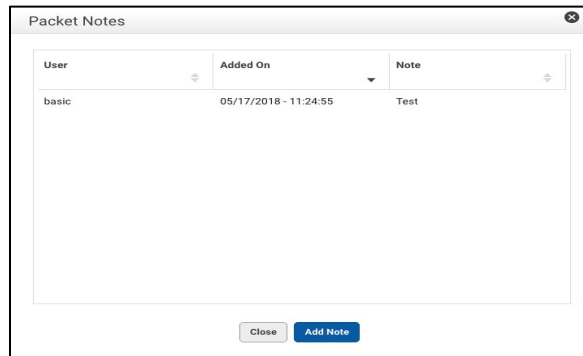


### 7.3.15 Notes Button

The **Notes**  button enables the User to make or view annotations about the packet. If the packet has notes, the **Notes** button appears with text lines (like the graphic above). If there are no notes, the **Notes**  button displays an empty page. This **Task** may be performed by all Users in any Queue.

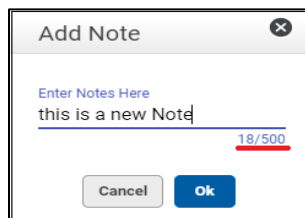
The **Packet Notes** window lists basic information about the notes. Click the **Add Note** button to make an entry. The **Close** button exits the window.

**Figure 93: Packet Notes Window**




The **OK** button confirms the entry, while the **Cancel** button stops the action and exits the window. There is a **500** character limit per note, which is tracked beneath the entry field. Notes are not editable after clicking the **OK** button.

**Figure 94: Add Note Window**

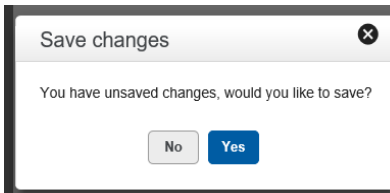


### 7.3.16 Close Button


The **Close**  button exits the **Packet Detail** screen and returns to the **Results Grid** on the **Queues** or **Search Tab**. This **Task** may be performed by all Users in any Queue.

When closing the **Packet Detail** screen, there is an option to save any changes made to the Packet Detail information. Select **Yes** to proceed with saving or **No** to discard all entries.

**Figure 95: Save Changes Window**



### 7.3.17 Mark Unread Button

The **Mark Unread**  button changes the packet phase for the selected row from opened (normal style text) to **unopened**, which is displayed in **bold** text. This button is only available for the **Results Grid** on the **Queues Tab**. This **Task** may be performed by all Users in any Queue.

## 7.4 Automatic Mode

Click on the **Packet Count** number in the **Queue Hierarchy** on the **Queues Tab** to initiate **Automatic Mode** for the associated Location/Queue.

**Automatic Mode** displays all packets for the selected **Queue** in the **Packet Detail** screen, starting with the oldest first. As an **Action** is completed on each packet, the next oldest packet is automatically displayed for processing.

**Automatic Mode** continues until all packets have been processed. Selecting the **Close** button exits Automatic Mode and returns to the **Results Grid** on the **Queues Tab**.

## 8 Admin Application

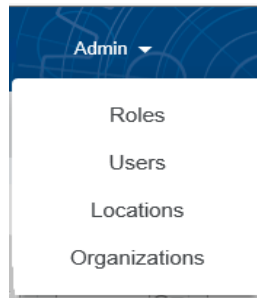
A **COR** with **Admin** (Administration) permission can add, modify, disable, and delete **User** accounts and **Locations** within the **Queue Hierarchy**. The **Admin** option is on the right side of the **Application Toolbar** at the top of the screen.

Figure 96: CM Portal Application Toolbar – Admin Option



A drop-down menu offers four (4) options: **Roles**, **Users**, **Locations**, and **Organizations**.

Figure 97: Admin Drop-down Menu



### 8.1 Roles

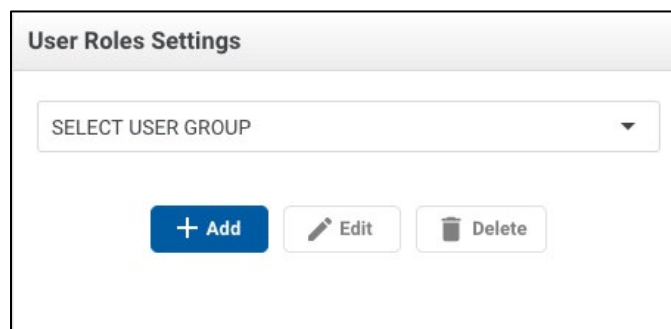
The **Roles** option adds or changes the **Queue** and **Menu Permissions** and **Locations** for new or existing **User Roles**:

- User Roles Settings – User Roles within the CM Portal
- SSO Roles Settings – User Roles outside of the CM Portal using other applications that access this system

#### 8.1.1 Add, Edit, or Delete User Roles Settings

Add, edit, or delete **User Roles** as necessary based on permission, **Queue**, and **Location** assignments from the **User Roles Settings** section on the left side of the screen.

Figure 98: User Roles Settings Section



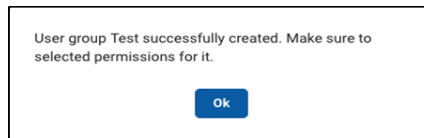
### 8.1.1.1 Add a User Role

In the **User Roles Settings** section, the **Add** button reveals the **Create New User Role** window. Enter Name, Description, and location access information.

Figure 99: Create New User Role Window

The **Save** button establishes the **New User Role**, while the **Cancel** button stops the action and exits the window. After saving the **New User Role**, click the **OK** button to select the appropriate **Queue** and permissions.

Figure 100: User Permission Selection Reminder



Select one or more categories from the options menus by marking the checkboxes in the **Queue Type** and **Menu Item Permissions** sections.

Figure 101: User Roles Settings Permissions Window

Permissions	Queue Type
<input type="checkbox"/>	Assignment Queue
<input type="checkbox"/>	Authorization Queue
<input checked="" type="checkbox"/>	COR Authorization
<input type="checkbox"/>	Hold
<input type="checkbox"/>	Reassign RO
<input type="checkbox"/>	UM Final Auth
<input type="checkbox"/>	UM First Auth
<input type="checkbox"/>	Work Queue

Permissions	Menu Item
<input checked="" type="checkbox"/>	Search View
<input checked="" type="checkbox"/>	WorkflowPackets View
<input type="checkbox"/>	Read Only Access
<input type="checkbox"/>	Direct Upload View
<input checked="" type="checkbox"/>	Decision Ready Claim View
<input checked="" type="checkbox"/>	Reports View
<input checked="" type="checkbox"/>	Admin View

The new **User Role** has full-function access (all buttons) on the **Packet Actions Task Bar** ([Section 7.3](#)) for the chosen **Queue Type Permissions**.

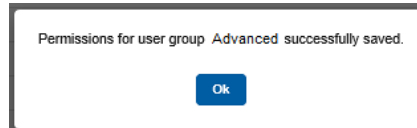
**Packet Actions Task Bar** buttons vary depending on the screen, number of rows chosen, **User Role**, **Queue** ([Section 4.7](#)), and current state of the packet (completed versus in-progress).

Select the **Read Only Access Menu Item Permission** to restrict all functions except the **Task** buttons: **View Packet, Download, Export as CSV, History, Notes, Close, and Mark Unread**.

The **Save** button on the **Task Bar** at the top of the screen completes the **New User Role** addition.

Click the **OK** button to confirm the User permission selections. The last User Role that was added or edited remains on the screen until another User Role is created or changed.

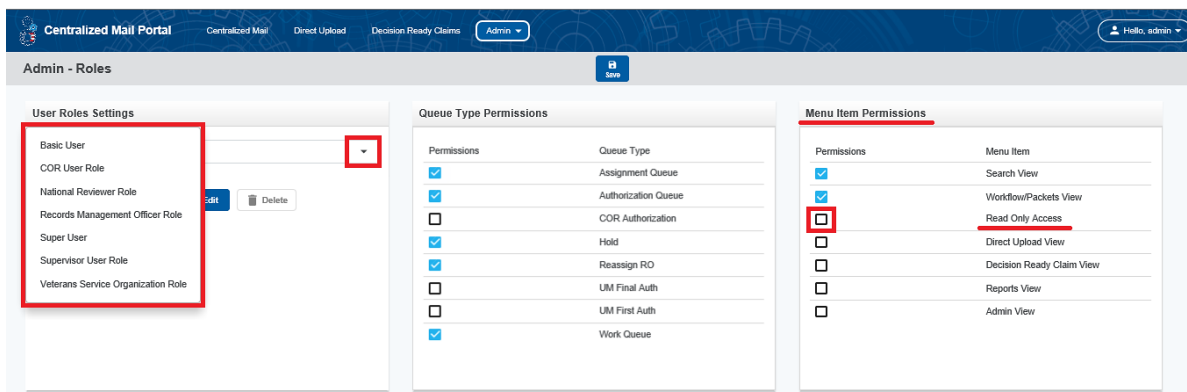
**Figure 102: User Permissions Save Confirmation**



### 8.1.1.2 Edit a User Role

Choose a **User Role** from the **User Roles Settings** drop-down menu.

**Figure 103: User Roles Settings Drop-down Menu**



Mark or clear the checkboxes in the **Queue Type** and **Menu Item Permissions** sections to change permissions.

The **User Role** has full-function access (all buttons) on the **Packet Actions Task Bar** ([Section 7.3](#)) for the chosen **Queue Type Permissions**.

**Packet Actions Task Bar** buttons vary depending on the screen, number of rows chosen, **User Role, Queue** ([Section 4.7](#)), and current state of the packet (completed versus in-progress).

Select the **Read Only Access Menu Item Permission** to restrict all functions except the **Task** buttons: **View Packet, Download, Export as CSV, History, Notes, Close, and Mark Unread**.

The **Save** button on the **Task Bar** at the top of the screen updates the modifications.

To revise a **User Role Description** or **Location** access, click the **Edit** button directly below the **User Roles Settings** drop-down menu to reveal the **Editing User Role** window.



**Figure 104: Editing User Role Window**

After updating, the **Save** button retains the updated **User Role** information, while the **Cancel** button stops the action and exits the window.

Click the **OK** button to confirm the **User Role** adjustments in the **User Role Update** confirmation window. The last User Role that was added or edited remains on the screen until another User Role is created or changed.

**Figure 105: User Role Update Confirmation Window**

### 8.1.1.3 Delete a User Role

Choose a **User Role** from the **User Roles Settings** drop-down menu. The **Delete** button removes the **User Role** from the list, while the **Cancel** button stops the action and exits the window.

Default **User Roles** (Basic User, Super User, etc.) cannot be deleted.

**Figure 106: Delete Group Window**

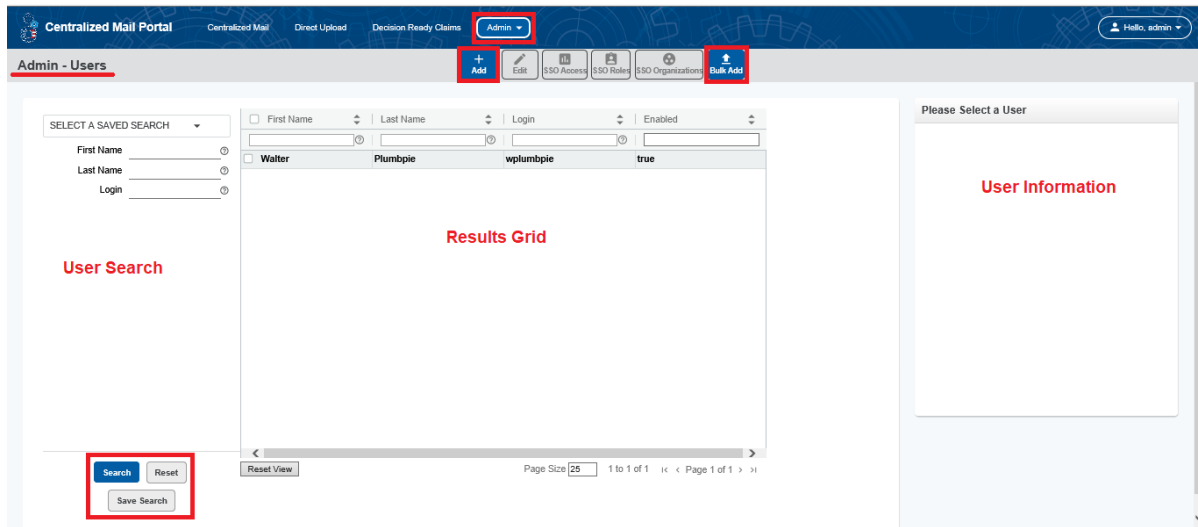
Click the **OK** button to confirm removal of the **User Role**.

**Figure 107: User Role Deleted Confirmation Window**

## 8.2 Users

The **Users** option creates and edits user profiles for VA employees and external VSO and Veteran representative Users who access the CM Portal on the Veteran’s behalf. The Admin-Users screen is divided into three (3) sections: **Search, Results Grid, and User Information**.

Figure 108: Admin-Users Screen



### 8.2.1 Add a User

Click the **Add** button on the left side of the **Task Bar** at the top of the screen to display the **Add User** window. Entries in red text fields are required. The **Email** address populates the **Username** field. Fields with **Down Arrows** have a drop-down options list.

After entering a **User Role** and **Location**, click the **Add User Role** button to record the information in the **Location** and **User Role** listing. Add more than one **Location** and **User Role** when required. Mark the appropriate checkbox on the left side of the **Location** name to designate the **Location/User Role** for the **User**.

To remove a **Location/User Role**, mark the checkbox on the left side of the **Location** name or **Location** header (to remove all listings) and click the **Delete** button.

Figure 109: Add User Window

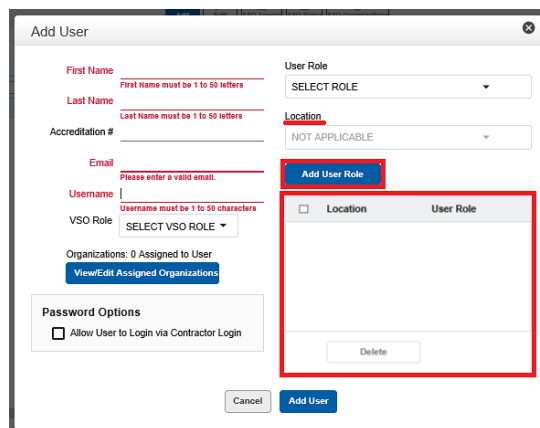
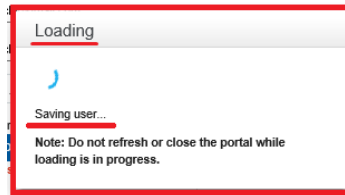


Figure 110: Add User Role and Add User

The **Add User** button establishes the new User in the system, while the **Cancel** button stops the action and exits the window.

Figure 111: Add User Save Window



### 8.2.2 Bulk Add Multiple Users


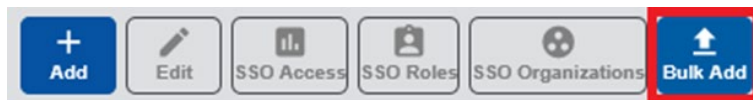
The **Bulk Add**  button on the right side of the **Task Bar** at the top of the screen uploads a comma-separated values (**CSV**) file with information for multiple Users to efficiently create a large number of new Users without extensive manual data entry.

Figure 112: Admin-Users Task Bar

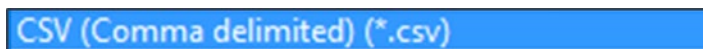


#### 8.2.2.1 Create the Bulk Add CSV File

A **CSV** file is a text file, so it can be created and edited using any text editor software (e.g., Notepad); however, it is more frequently created in a spreadsheet program like Microsoft Excel.

Regardless of the software program used to create the file, it must be saved with the **.csv** file extension type. The file name itself does not affect the upload process—only the file extension type.

Figure 113: CSV File Extension Type



The CSV file must use the following column value order and meet the specified criteria.

**Table 3: CSV File Column Value Order and Criteria**

Column Letter	Column Field Value	Field Requirement	Field Criteria
A	First Name	Required	Letters A–Z only with a 50-character maximum limit
B	Last Name	Required	Letters A–Z only with a 50-character maximum limit
C	Accreditation (Number)	Required – VSO Role Optional – Others	Numerical (0–9) values only with a six-digit limit
D	Email Address	Required	Use a valid email format (e.g., First.Last@va.gov). Username is generated from the email address.
E	VSO Role	Required for VSO Role ONLY	Use a valid VSO Role listed in the CM Portal.
F	Organization Name	Required for VSO Role ONLY	Use a valid VSO Organization listed in the CM Portal.
G	Contractor Login	Required	Y (Yes) or N (No)
H	Role (User)	Required	Use a valid User Role listed in the CM Portal. One (1) role or a comma-separated role list
I	Location	Required	Use a valid Location listed in the CM Portal. One (1) location or a comma-separated location list

**Figure 114: CSV File Column Value Order**

First Name	Last Name	Accreditation	Email Address	VSO Role	Organization Name	Contractor Login	Role	Location
------------	-----------	---------------	---------------	----------	-------------------	------------------	------	----------

Each row in the CSV file must follow defined rules:

- Only one (1) **User** is listed per row.
- Each value in the row is separated by a comma.
- Each row contains all column values. If a value is not applicable, use a comma as a placeholder for the missing value (e.g., First Name,Last Name,,Email Address,,Contractor Login,Role,Location).

**8.2.2.1.1 Microsoft Excel File Template for Creating the CSV File**

The embedded Microsoft Excel file (DMHS-CMPortal-AddBulkUserTemplate-v1.1) facilitates creation of the **Bulk Add** CSV file. Use of this template is not required.



DMHS-CMPortal-AddBulkUserTemplate-

The following column field values have drop-down options lists to select an entry:

- VSO Role (Column E)
- Organization Name (Column F)
- Contractor Login (Column G)
- Role (Column H)
- Location (Column I)

Use the column field value **Tab** at the bottom of the **Worksheet** to add new options to the drop-down lists (Columns **E–F** and **H–I**) when necessary. New options must be valid **VSO Roles** and **Organizations**, **User Roles**, and **Locations** that are listed in the CM Portal.

Select the appropriate **Tab**, and add the new entry value to the options list in Column **A**. The **Row** where the new entry is placed determines its position in the drop-down list:

- Enter the value in the cell immediately below the last entry. The new option displays at the end of the drop-down list on the **Users Tab**.
- Enter the value in the cell immediately below the last entry, select all entries in Column A, and perform a **Sort A to Z**. The new option displays alphabetically ordered in the drop-down list on the **Users Tab**.
- **Insert** a new **Row** to designate a specific location within the list. The new option displays where positioned in the drop-down list on the **Users Tab**.

The Excel file is macro-enabled to allow selection of multiple **Roles** and **Locations** in Columns **H–I**. A yellow **Message Bar** with a **Security Warning** may appear at the top of the screen. Click the **Enable Content** button to activate the macro function.

When selecting multiple **Roles** and **Locations**, the list is automatically generated as a comma-separated list enclosed in quotation marks for those column field values, as shown in the example below.

Roger,Daltry,,Roger.Daltry@va.gov,,N,"Basic User,Supervisor User Role","Boston,Baltimore"

The column header title row is maintained (if not deleted) when saving the file in the **CSV** format. When the file is transferred to the CM Portal, the header row becomes invalid, but this status does not negatively impact the upload.

Save the Excel file as both an **Excel Macro-Enabled Workbook (\*.xlsm)** for future use and a **CSV (Comma delimited) (\*.csv)** file for the **Bulk Add** upload. **CSV** files do not support Excel spreadsheets with multiple Worksheets. Click the **OK** button to save only the active **Users** Worksheet for upload and the **Yes** button to proceed with conversion to a **CSV** file.

#### 8.2.2.1.2 Multiple Roles and Locations per User

Every **Role** and **Location** must be explicitly indicated in Columns **H–I**, when adding multiple entries for each entity under a single User.

The number of **Roles** must equal the number of **Locations** if there are multiple Roles across multiple Locations:

- The first **Role** in the comma-separated Role list is assigned to the first **Location** in the comma-separated Location list. The second Role and second Location are assigned to each other. This sequential pairing proceeds accordingly till the end of both lists.

- The **COR** and **National Reviewer Roles** apply to all Locations. Select "All" from the **Location** options list for assignment to these **Roles**.

Similar rules apply for **Users** with specific Roles at a particular **Location**:

- No other Role can be assigned when the **COR Role** is designated.
- **Basic User, Super User, and Supervisor Roles** cannot be assigned at the same Location.

The following examples illustrate selecting multiple Roles and **Locations** (**Basic User** in the **Boston** Regional Office and a **Supervisor** in the **Baltimore** Regional Office) for both text editor software and a spreadsheet program:

- Multiple **Roles** and **Locations** in text editor software are denoted by a comma-separated list enclosed in quotation marks for those field values, as shown below. If a field value is not applicable, use a comma as a placeholder for the missing value.


Roger,Daltry,,Roger.Daltry@va.gov,,,N,"**Basic User,Supervisor User Role**","**Boston,Baltimore**"


- In the Excel Template, multiple **Roles** and **Locations** are automatically generated as comma-separated lists using the drop-down options lists in Columns **H-I**.

**Figure 115: Multiple Roles and Locations Example in the Excel Template**

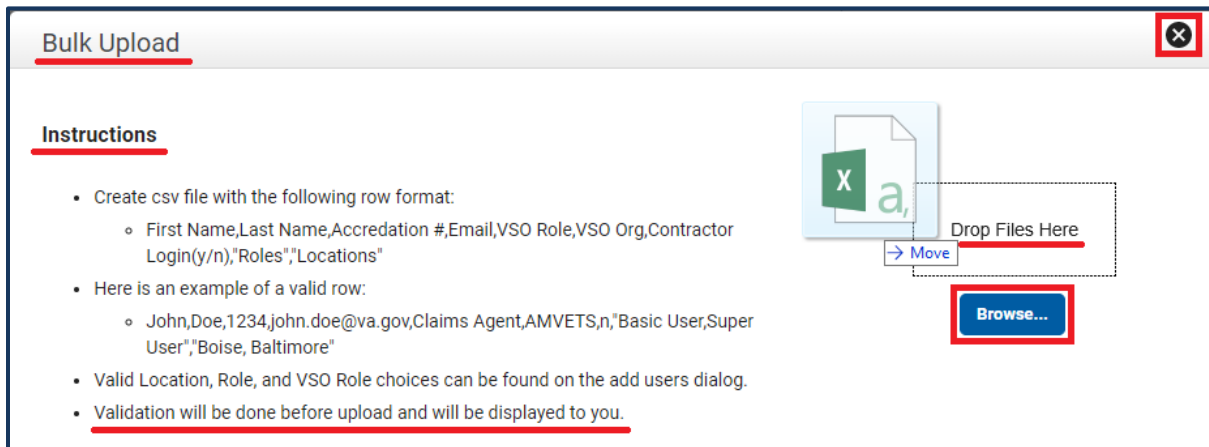
	A	B	C	D	E	F	G	H	I
1	First Name	Last Name	Accreditation	Email Address	VSO Role	Organization Name	Contractor Login	Role	Location
2	Roger	Daltry		Roger.Daltry@va.gov			N	Basic User,Supervisor User Role	Boston,Baltimore
3									

### 8.2.2.2 Complete Bulk Add Users

When the **CSV** file meets the established criteria and is ready for upload, click the **Bulk Add**  button on the right side of the **Task Bar** to display the **Bulk Upload** window.

The **Bulk Upload** window reiterates the **CSV** file creation instructions. The  icon in the upper right corner of the window returns to the **Admin-Users** screen.

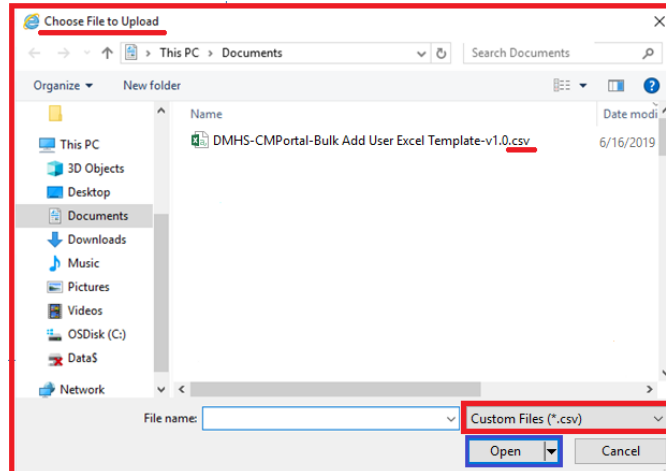
**Figure 116: Bulk Upload Window**



There are two (2) methods for uploading the **CSV** file:

- Click the **Browse** button to activate the **Choose File to Upload** pop-up window. Select the appropriate document, and click the **Open** button to initiate the file transfer.

**Figure 117: Choose CSV File to Upload**



- Drag the file from the computer desktop or designated file folder in **File Explorer**, and release it in the **Drop Files Here** box.


The CM Portal validates the CSV file automatically when the file is transferred. The **Bulk Upload Validation Results Grid** displays either a **Valid** or an **Invalid** status for each entry row in the file.

If the column header title row from the Excel Template was not deleted prior to saving the **CSV** file, the header row has an **Invalid** status that can safely be ignored. The last row in the **Bulk Upload Validation Results Grid** reports empty value fields with an **Invalid** status for the unused rows in an Excel file; this does not negatively affect the upload and may be dismissed.

**Figure 118: Bulk Upload Validation Results Grid**

State	First Name	Last Name	Accreditation	Email Address	VSO Role	Organization Name	Contractor Login	Role	Location
INVALID	First Name	Last Name	Accreditation	Email Address	VSO Role	[Organization Name]	Contractor Login	Role	Location
VALID	bulktest	user		bulktest.user1@va.gov			N	Supervisor User Role	Milwaukee
VALID	bulktest	user		bulktest.user2@va.gov			N	Basic User	St Louis
VALID	bulktest	user		bulktest.user3@va.gov			N	Super User, Super User	St Louis, Detroit
INVALID									

Confirm that **Invalid** rows are only the column header title row and unused rows in an Excel file, which are acceptable with that status. Correct all **Invalid** rows for **User** entries in the original file, and retry the **Bulk Add** upload.

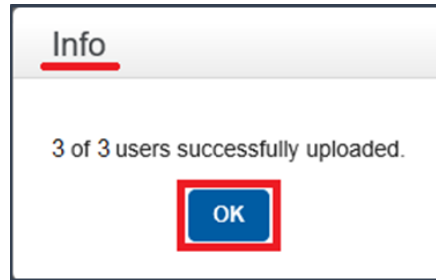
The **Cancel** button or the  icon in the upper right corner of the window exits the **Bulk Upload Validation Results Grid** and returns to the **Admin-Users** screen.

Click the **Upload Valid Rows** button to proceed with upload for the number of **Valid** entries listed in parenthesis.

An **Info** (Information) confirmation window announces the number of new **Users** that were successfully transferred to the CM Portal. Click the **OK** button to acknowledge the upload status and return to the **Admin-Users** screen.

If there is a difference between the number of **Valid Users** initially uploaded versus successfully uploaded, the **User** was already established in the CM Portal, and the system did not duplicate the entry.

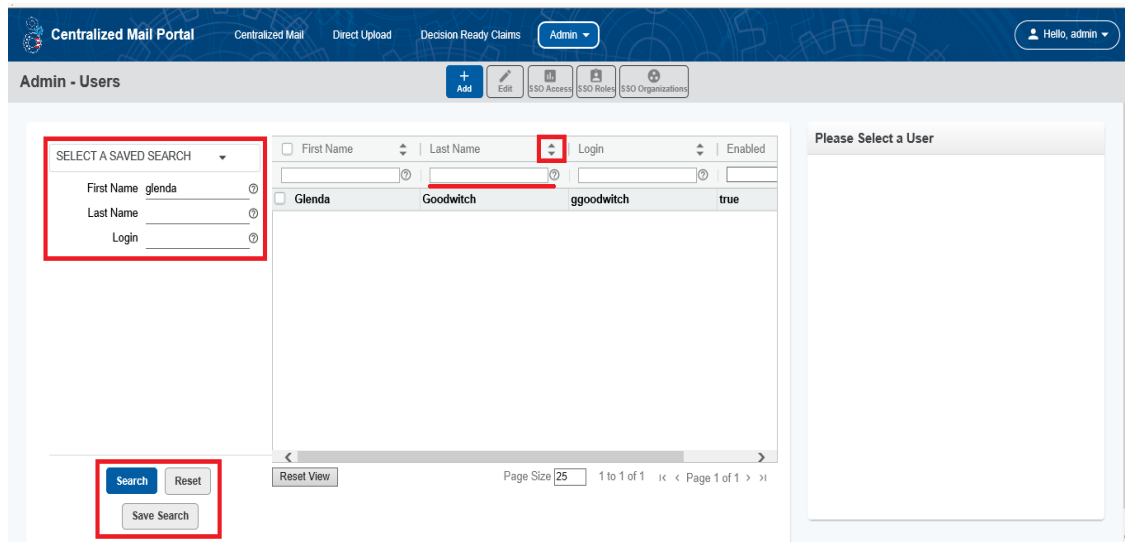
**Figure 119: Info Confirmation Window**





### 8.2.3 Search for a User

Find a **User** through **Results Grid Sorting** or **Filtering** or conduct a **Search** using the **Search Menu** on the left side of the screen.

**Figure 120: Results Grid Sorting, Filtering, and Search to Find a User**

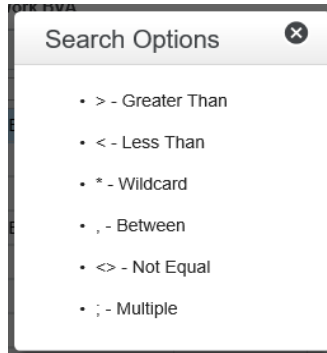


Click the **Question Mark**  icon to display the **Search Options** symbols. Use these symbols to define the search results for text values by entering the symbol (no space before or after) with the search parameter for the chosen criteria. The  icon closes the **Search Options** window.

For text values, use the **Wildcard** character \* after the letters with no extra space to find all text that begins with those letters. If the **Wildcard** character \* is placed before the letters, all results with those letters in the text display. Text is not case-sensitive.



**Figure 121: Search Options Symbols**



Specify at least one search criterion in any field to execute the search. Click the **Search** button to view all results matching the designated criteria.

The **Reset** button clears the contents in all criteria fields to begin another search. The **Results Grid** retains information from the previous search until a new search is performed or your CM Portal session ends.

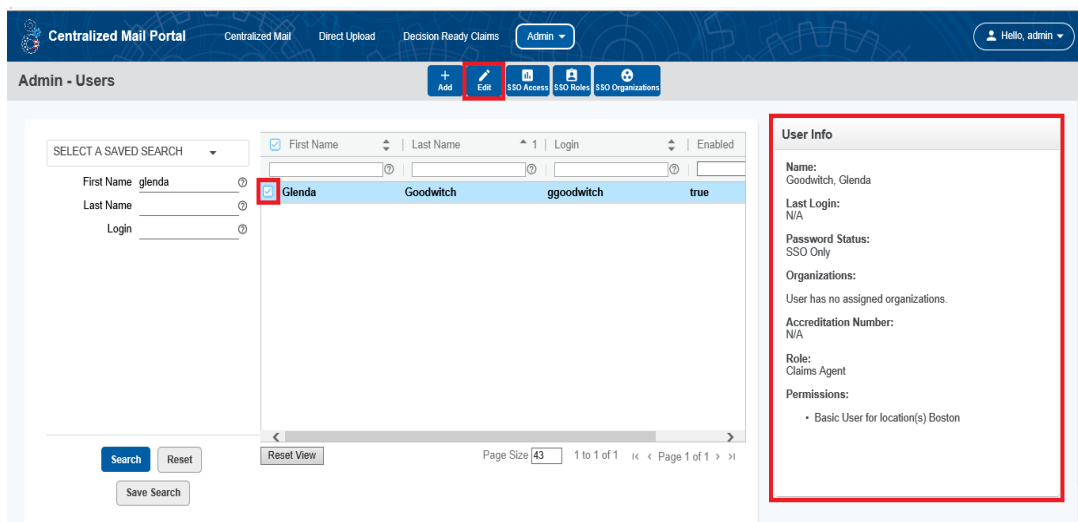
**Save Search** and **Select a Saved Search** for future use.

### 8.2.4 View and Edit a User

A single click anywhere along any row in the **Results Grid** selects that **User** (highlighted in blue) for viewing or processing and subsequently opens the **Task Bar** above the Results Grid.

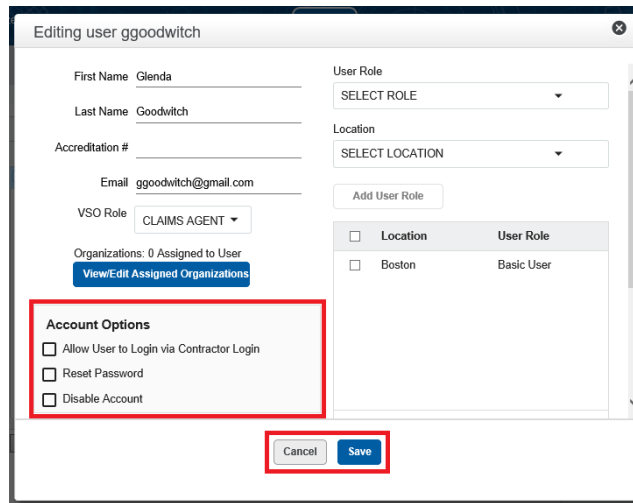
Basic **User Info** is summarized on the right side of the screen. Click the **Edit** button on the **Task Bar** to make any necessary revisions.

**Figure 122: View and Edit User Information**



Update any information that may have changed since the User was added. **Account Options** enable resetting a password or disabling an account.

Figure 123: Editing User Window



The **Save** button modifies the **User Role**, while the **Cancel** button stops the action and exits the window.

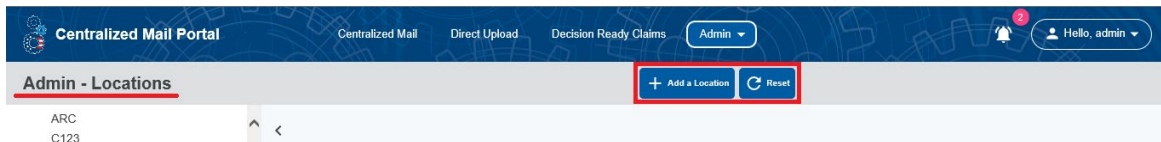
## 8.3 Locations

The **Locations** option adds, changes, or removes **Locations** in the **Queue Hierarchy** on the **Queues Tab**. The **Reset** button on the **Task Bar** exits any window and returns to the main **Locations** screen.

### 8.3.1 Add a Location

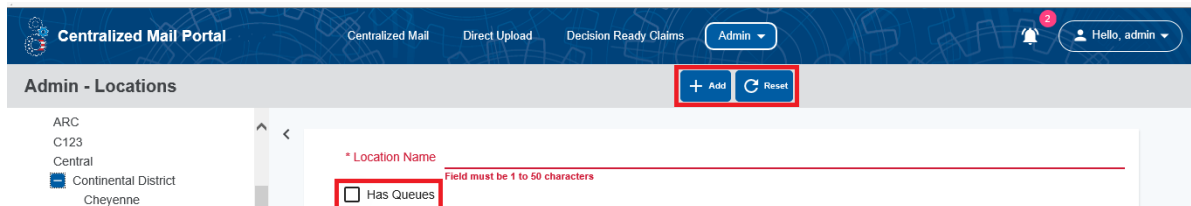
Add **Locations** on **Levels 1–3** (Line of Business, District, and RO) of the **Queue Hierarchy**. Click the **Add a Location** button on the **Task Bar** to start by adding a **Line of Business** on **Level 1**. At a minimum, fields marked with an asterisk \* before the **Field Name** are required.

Figure 124: Locations Screen



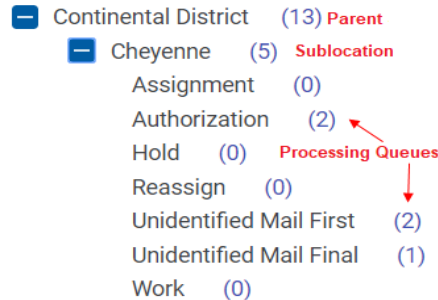
Enter the **Location Name**, which is the nomenclature shown throughout the CM Portal when referencing the **Location**.

Figure 125: Add a Location Window



Locations without processing **Queues** are always “parents” of other locations that are used to group sub-locations together in a logical set. Locations with processing **Queues** cannot be parents of other Locations and are always at the bottom of the **Queue Hierarchy**.

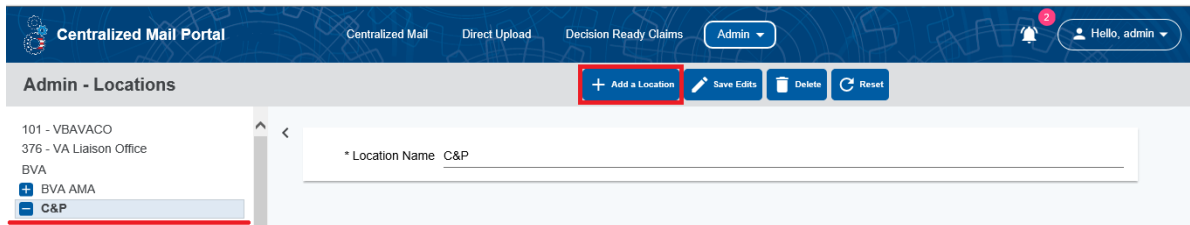
**Figure 126: Parent Location and Sublocation with Processing Queues**



The **Add** button establishes the new **Location**, while the **Reset** button exits the window and returns to the main **Locations** screen.

To add a **District** or **Regional Office** on **Levels 2–3**, highlight the **Line of Business/District** in the **Queue Hierarchy**. Click the **Add a Location** button on the **Task Bar**.

**Figure 127: Add a Location – District or Regional Office**



The **Add a Location** window appears. Enter the **Location Name**, which is the nomenclature shown throughout the CM Portal when referencing the **Location**.

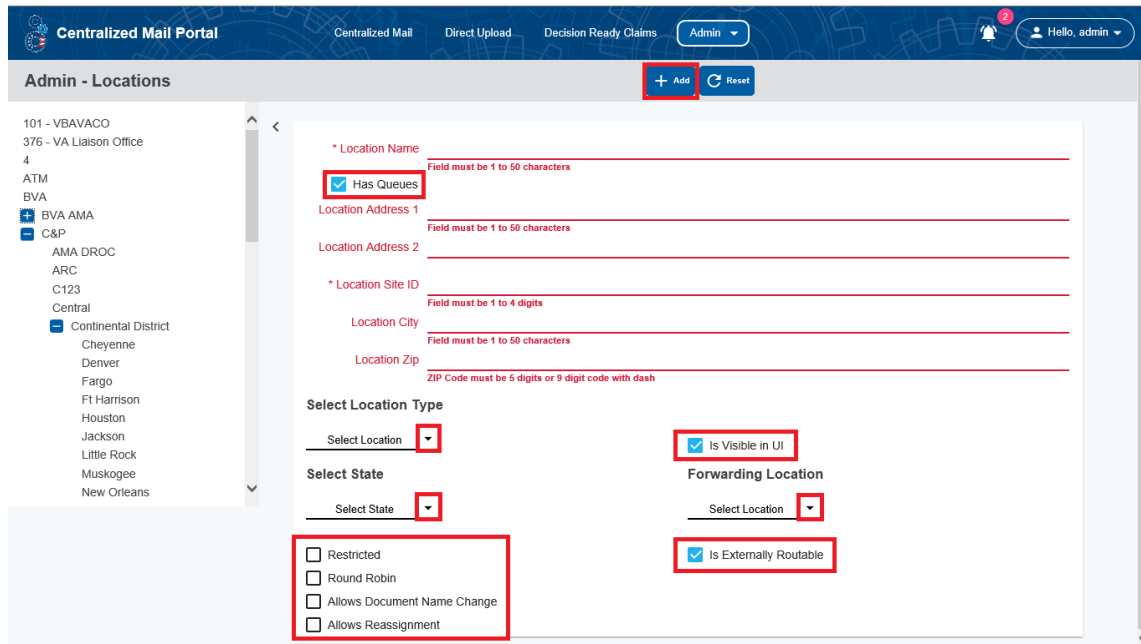
If a **Location** (regardless of its **Level**) has processing **Queues**, mark the **Has Queues** checkbox, which expands the **Location** fields screen. Fields with **Down Arrows** have a drop-down options list. At a minimum, fields marked with an asterisk \* before the **Field Name** are required.

Enter the **Location Address**, **Site Identification (ID) Number**, **Type**, and **State**.

The four (4) conditional checkboxes at the bottom of the screen determine User accessibility:

- **Restricted – Locations** that only appear in **Search** results generated by a **COR** or Users with special permission
- **Round Robin** – included in Round Robin process scheduling
- **Allows Document Name Change** – edit the document type in the **Document Name** field on the **Packet Detail** screen under **Document Indexing** for packets at that **Location**
- **Allows Reassignment** – Location appears in the Reassignment Location options list

**Figure 128: Add a Location with Queues Window**



The three (3) attributes in the middle of the screen (read-only) determine accessibility and routing activity. These are modified solely by the System Administrator under the direction of VCIP:

- **Is Visible in User Interface (UI)** – When the checkbox is marked, the **Location** displays in the **Queue Hierarchy** and is available for internal routing (e.g., Assign, Re-Assign, or Retrigger); otherwise, the **Location** is hidden if the box is unmarked.
- **Forwarding Location** – Certain processing activity redirects packets to an alternate Location if specified.
- **Is Externally Routable** – When the checkbox is marked, the **Location** allows transmissions from ICMHS/PMR vendors; otherwise, the **Location** is inaccessible to external sources if the box is unmarked.

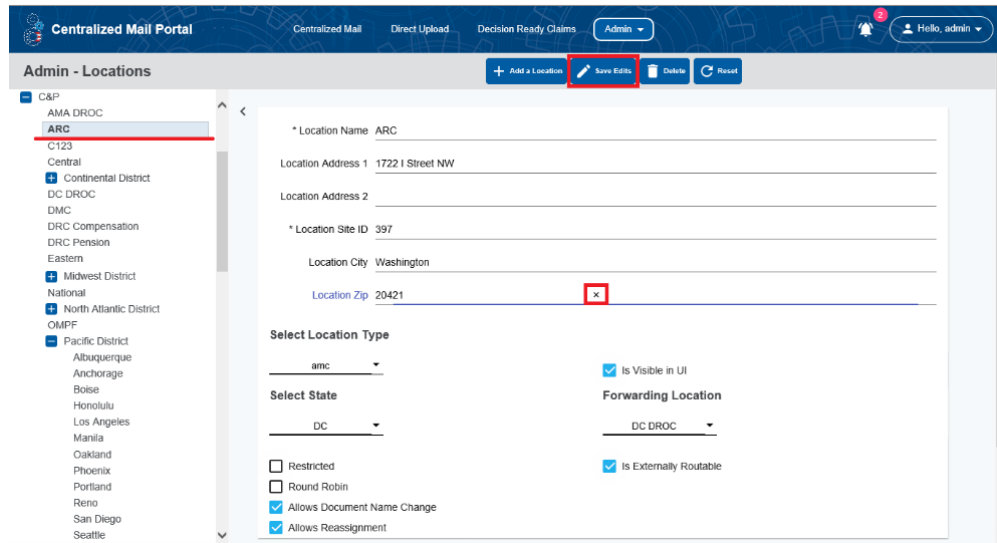
Contact the **CM Portal Help Desk** ([Section 1.3](#)) to alter these three (3) **Location** attributes.

The **Add** button establishes the new **Location**, while the **Reset** button exits the window and returns to the main **Locations** screen.

### 8.3.2 Edit a Location

Highlight the **Location** in the **Queue Hierarchy**. Change the various fields as necessary. The **X** icon on the right side of the field deletes the current entry. Click the **Save Edits** button on the **Task Bar** to update the information.

Figure 129: Save Edits Window



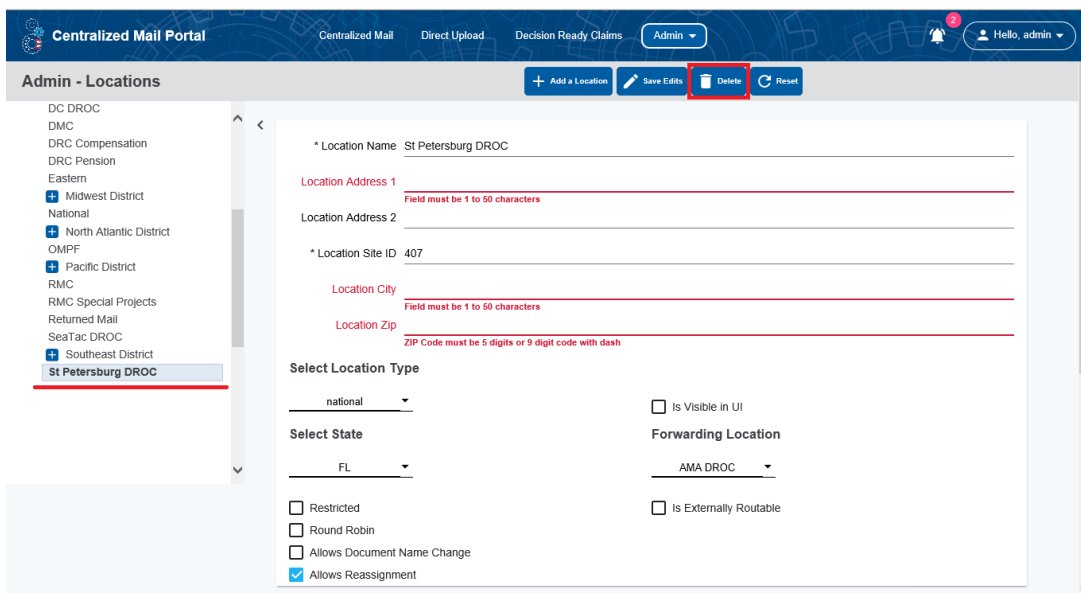
### 8.3.3 Delete a Location

**Locations** must be deleted by starting at the lowest level of the **Queue Hierarchy** and proceeding in reverse order from Level 3 up through Level 1. Locations with processing **Queues** are removed first, and parent Locations are eliminated last.

Locations with processing **Queues** cannot be deleted if packets have been previously assigned to any Queue (even if currently empty).

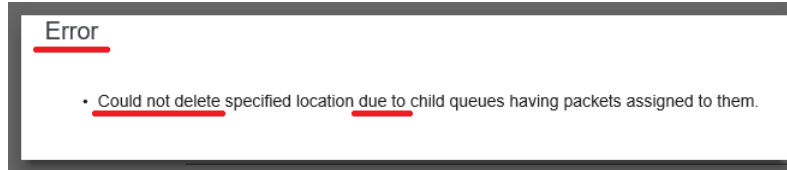
Highlight the **Location** in the **Queue Hierarchy**. Click the **Delete** button on the **Task Bar** to remove the **Location**.

Figure 130: Delete a Location Window



An **Error** message appears if the **Location** cannot be removed. Click anywhere on the screen outside of the **Error** message window to close it. Otherwise, the **Location** is automatically eliminated, and the display returns to the main **Locations** screen.

**Figure 131: Delete Location Error Message Example**



## 9 Watermarks

A standard watermark is included on all images, which lists the Date of Receipt at the vendor site and its location.

Figure 132: Standard Watermark

09/24/2014 – VA Evidence Intake Center, Janesville WI

The **Best Copy** annotation is applied when an image has achieved maximum enhancement or the original source contains data loss.

Figure 133: Best Copy Watermark

BEST COPY

Any non-PMR document marked **Best Copy** has the full watermark.

Figure 134: Full Non-PMR Watermark

09/24/2014 – VA Evidence Intake Center, Janesville WI  
BEST COPY

Additional watermarks for the PMR process include the **Scan Date**, which may differ from the Date of Receipt at the vendor site, and a **PMR Program Referred** designation.

Figure 135: PMR Watermark

ScanDate: 09/25/2014 – PMR PROGRAM REFERRED

Every PMR document marked **Best Copy** has the full watermark.

Figure 136: Full PMR Watermark

09/24/2014 – VA Evidence Intake Center, Janesville WI ScanDate: 09/25/2014  
BEST COPY – PMR PROGRAM REFERRED

## 10 Appendix A – Acronyms

This list contains all acronyms used in this document, along with their descriptions.

Acronym	Description
ADMIN	Administration
AE	AutoEstablish/AutoCEST (Automatic Claim[s] Establishment)
a.m.	Ante Meridiem – derived from Latin and meaning “before noon”
ARC	Allocation Resource Centers(s)
BVA	Board of Veterans Appeals
C123	C-123 aircraft used in Vietnam as part of Operation Ranch Hand (ORH) contaminated with Agent Orange herbicide
C&P	Compensation and Pension
CACI	CACI International Inc.
CM	Centralized Mail
COM	Commercial
COR	Contracting Officer's Representative
CSRA	Computer Systems Research and Applications Corporation
CSV	Comma-Separated Values – a simple file format used to store tabular data in plain text (e.g., spreadsheet)
CTRL	Control
DD	Day of the month expressed with two (2) digits
DMHS	Digitized Mail Handling Services
DRC	Decision Ready Claim(s)
DU	Direct Upload
e.g.	<i>exempli gratia</i> – in Latin means “for example” and introduces one or more examples that illustrate something stated (Anglicized interpretation – “example given”)
EMERG	Emergent
EST	Eastern Standard Time
GOV	Government
HTTPS	Hypertext Transfer Protocol Secure
ICMHS	Intake, Conversion, and Mail Handling Services
ID	Identification
IE	Microsoft Internet Explorer Web Browser



Acronym	Description
INFO	Information
IP	Internet Protocol
MM	Month expressed with two (2) digits
N	No
OBPI	Office of Business Process Integration
PDF	Portable Document Format
PII	Personally Identifiable Information
PIN	Personal Identification Number
PIV	Personal Identity Verification
p.m.	Post Meridiam – derived from Latin and meaning “after noon”
PMC	Pension Management Center(s)
PMR	Private Medical Record(s)
PO	Post Office
RMO	Records Management Officer(s)
RO	Regional Office(s)
SMS	Systems Made Simple
SSOi	Single Sign-On Internal
UAM	User Access Management
UI	User Interface
UM	Unidentified/Unidentifiable Mail
US	United States
VA	Department of Veterans Affairs
VBA	Veterans Benefits Administration
VBMS	Veterans Benefits Management System
VCIP	Veterans Claims Intake Program
VPN	Virtual Private Network
VSO	Veterans Service Organization(s)
XLSM	Microsoft Excel Macro-Enabled Document 2007–Present file format
Y	Yes
YY	Year expressed with two (2) digits