Veterans Benefits Administration

Digital Mail Handling Services

Basic User Manual

Version 3.4

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Revision History

Date	Version	Change Description	Author
07/22/2015	0.1	Initial document creation	Sandy Bennett
07/30/2015	1.0	Technical Review and Formatting	Tim Geffre
08/27/2015	1.1	Replace Complete button with Submit button. Add Page Count column to Document Attach grid. Revise all screenshots that have changed since last update.	Sandy Bennett
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03/09/2016	2.3	Revise screenshots to reflect D360 and improved user platform.	Sandy Bennett
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08/02/2016	2.7	Updated to dual authentication standard	Ryan Wright
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8/18/2017	3.1	Updated URL in Section 1.1, Updated screenshots and removed unnecessary information in Section 2; made general formatting changes	TeamSMS

Date	Version	Change Description	Author
10/15/2017	3.2	Updated figures to reflect wording changes to Veteran File # and Emergent Flashes	Team SMS
11/26/2017	3.3	Update Versioning	Team SMS
12/7/2017	3.4	Removed reference to Direct Upload. Added User Identification and VA Registration.	Team SMS

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1 Environment & Technical Support

The following subsections provide information regarding the production environment and technical support available for Direct Upload.

1.1 Production Environment

The production environment can be accessed via the following URL:

https://cmp-prod.datadimensions.com/CMP/

1.2 Technical Support

Technical support is provided via office hours and help desk support:

Office Hours of Operation

7:30 a.m. – 4:30 p.m., Monday through Friday, excluding holidays.

Help Desk Hours of Operation

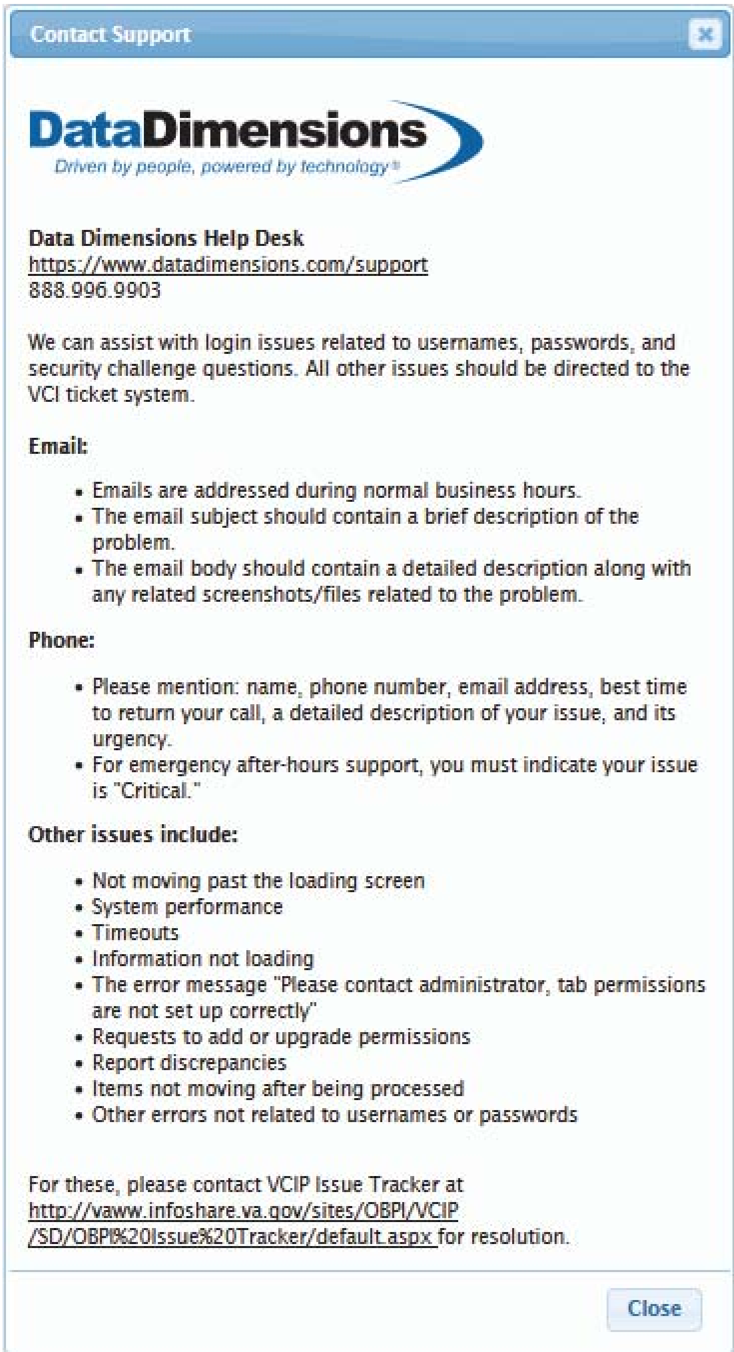
Monday – Friday: 24 hours per day, excluding holidays

Saturday: 8:00am – 2:00pm Central Standard Time (CST)

Sunday: Closed

Support contact information is shown in Figure 1.

Figure 1 : Support Contact Information



2 Logging into Portal

From the home realm discovery screen, Department of Veteran Affairs (VA) employees will *select* **VA Login** (Figure 2).

Figure 2: Home Realm Discovery Screen

Ensure you are connected using a VA Virtual Private Network (VPN) connection. Access is restricted by Internet Protocol (IP) address. If you are outside the VA IP address range, you will be blocked from accessing the portal.

***NOTE**: Users must use Internet Explorer (IE) 9 IE9 or higher versions. Chrome or Firefox may cause issues.*

When using IE, press CTRL+F5 to ensure that the browser is not in compatibility mode and the cache has been cleared.

There are two methods to log in:

- Using a Personal Identification Verification (PIV) card and Personal Identification Number (PIN).
- Using Windows Authentication.

Both methods are described in the following subsections.

2.1 Logging in using a PIV Card and PIN

After selecting VA Login (refer to Figure 2), the VA Single Sign-On window opens (Figure 3). *Select* **Sign In with a VA PIV Card**. Follow the instructions for logging in with the PIV card, including entering your PIN.

Figure 3: VA Single Sign-On

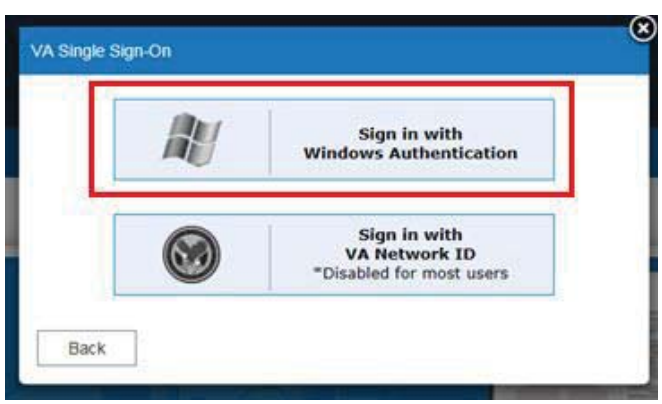
***NOTE**: The users PIV card must be inserted in the computer for PIV login to be successful.*

2.2 Logging in using Windows Authentication

To login using Windows Authentication perform the following steps:

1. *Select* **View other Sign-In Options** from the VA Single Sign-On window (refer to Figure 3).
2. *Select* the **Sign In with Windows Authentication** (Figure 4). Follow the login instructions to open the D360 Portal window.

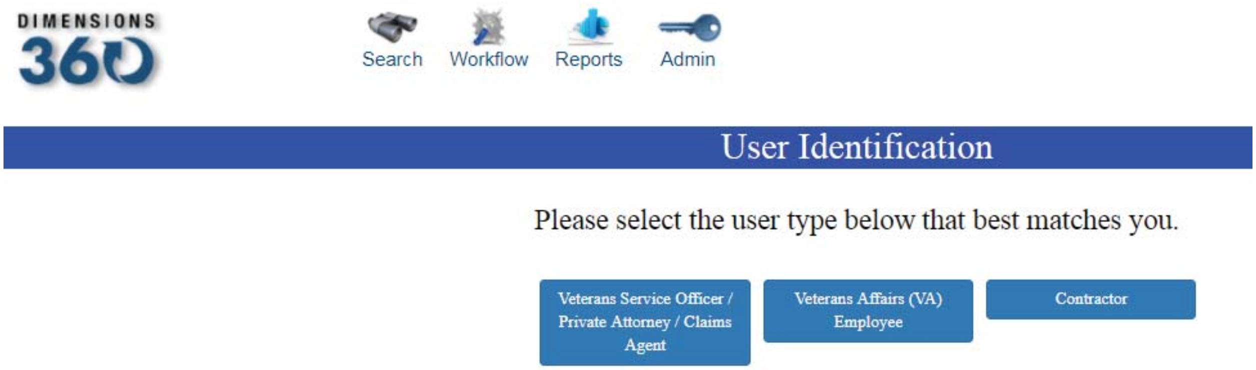
Figure 4: Windows Authentication Login Screen



2.3 User Identification Screen

See the display and instructions below to register.

User Identification Splash Screen



NOTE: *You must register the first time you log in. The system will retain your registration information for future logins.*

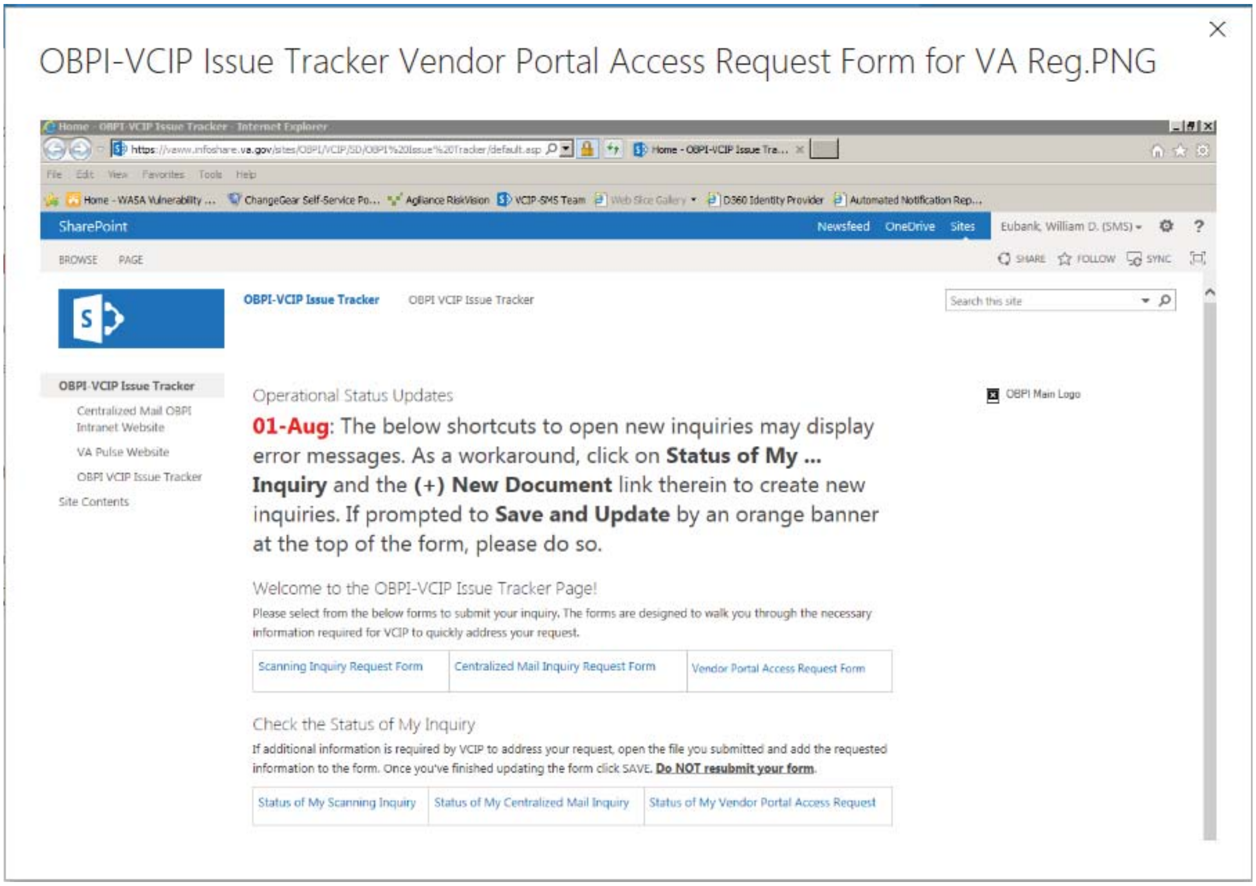
To register as a VA employee, perform the following steps:

1. *Click* the **Veterans Affairs (VA) Employee** button (see screen display above). The VA User Registration page is displayed below.

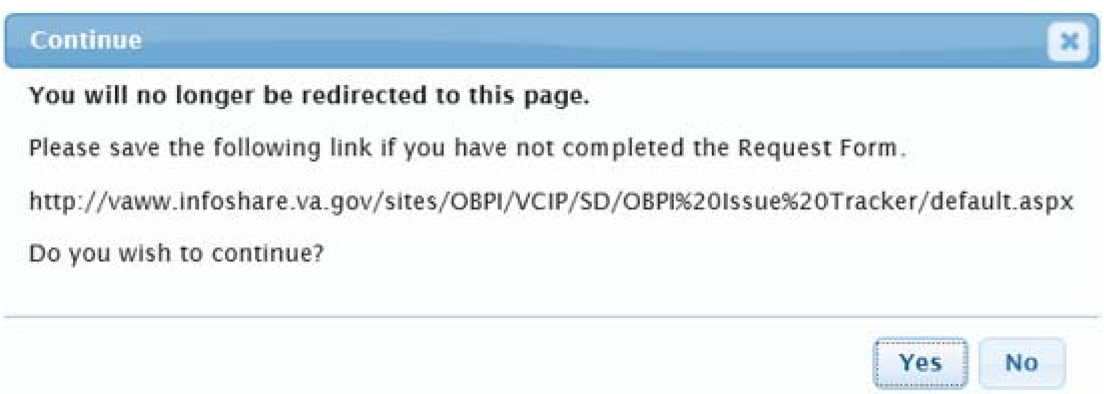
VA User Registration

2. *Click* the **Vendor Portal Access Request Form**, and the VA Registration Message is displayed (user must be on the VA network):

VA Registration Message



If the VA employee *clicks* on the **Continue** button, the following pop-up message appears:

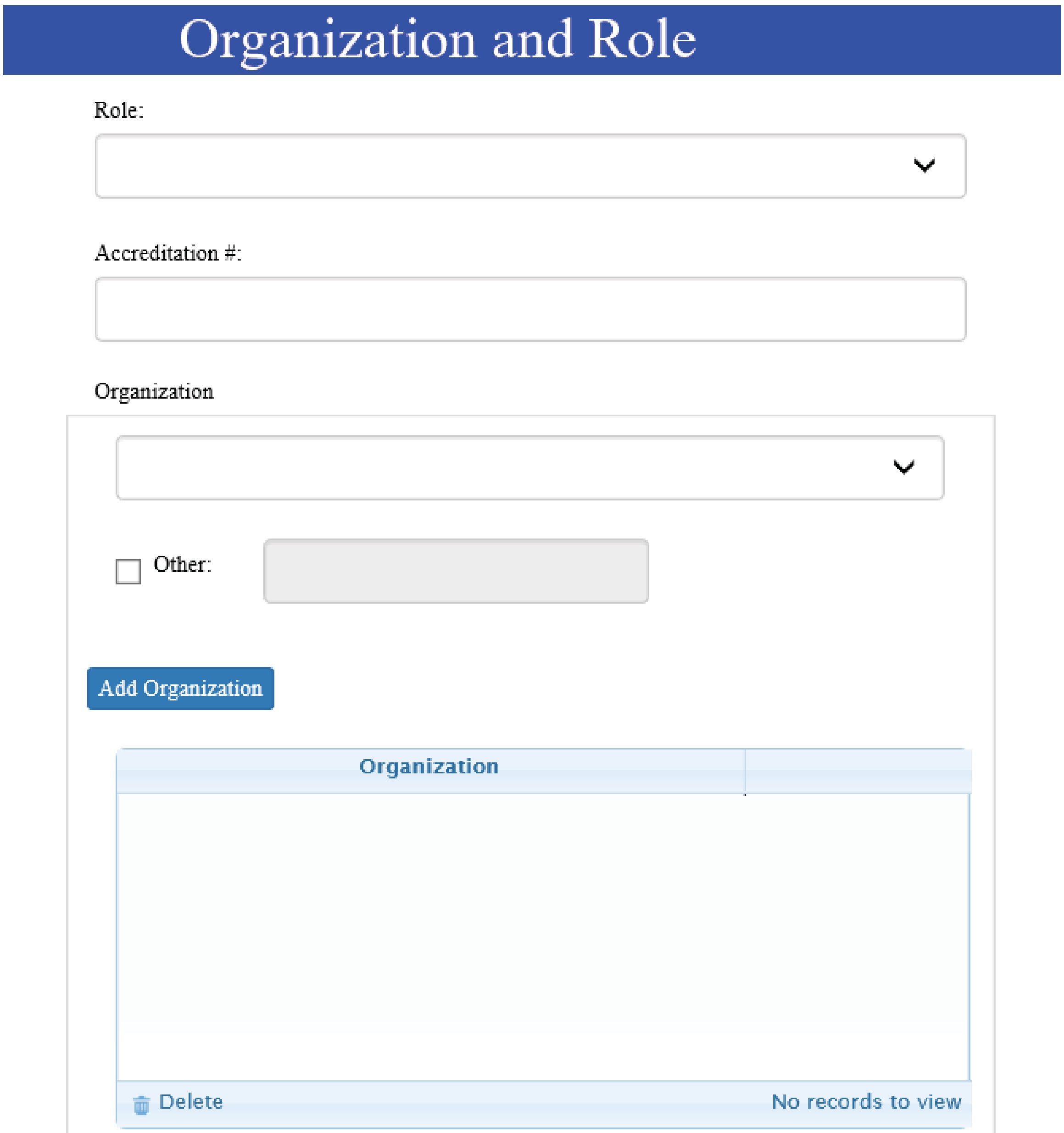


3. *Click* the **Yes** button to be redirected to the link on the message and complete the VA registration process.
4. *Click* the **No** button to return to the splash screen.

To register as a Veterans Service Officer/Private Attorney/Claims Agent, perform the following steps:

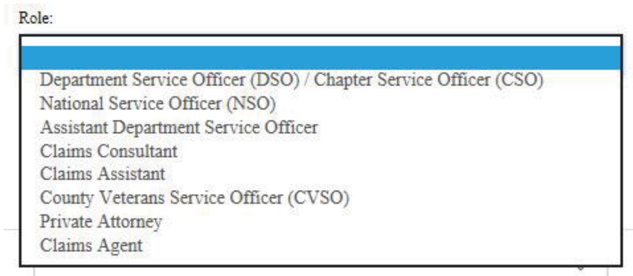
1. *Click* the **Veterans Service Officer/Private Attorney/Claims Agent** button (refer to in the above screen display). This will open the Organization and Role screen, as shown below:

Select Organization and Role



2. *Click* the **dropdown** arrow to select your role as shown below:

Select Role



NOTE: *You may only select ONE role.*

3. Role is a required field. If you do not select a role and *click* the **Next** button, you will receive the following error message:

Role Error Message

You must select a role.

4. *Enter* your accreditation number. Accreditation numbers must be between four and six characters and consist of numbers only.
5. The Accreditation Number field is a required field. If you do not enter an accreditation number and click the Next button, you will receive the following error message:

Accreditation Number Error Message

The Accreditation #: field is required.

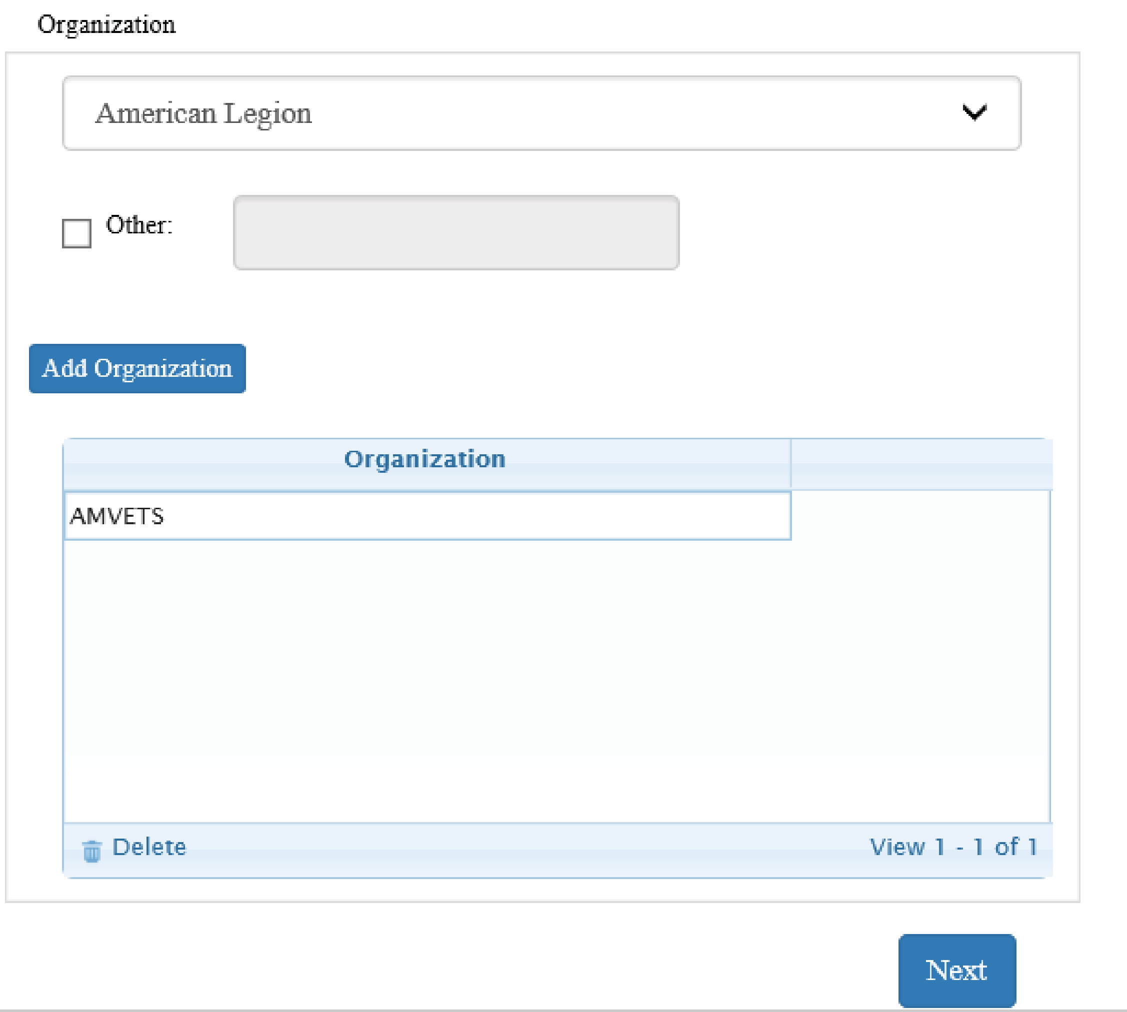
6. In addition, the Accreditation Number field has certain parameters. If you do not enter between 4 and 6 numeric characters and *click* the **Next** button, you will receive the following error message:

Accreditation Number Parameter Error Message

Accreditation number should be between 4 and 6 characters, and consist of numbers only.

7. *Click* the **dropdown** arrow to select your organization.

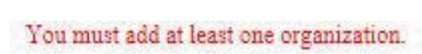
Add Organization



***NOTE:** You may add multiple organizations with which you are associated, but you may only select one organization at a time.*

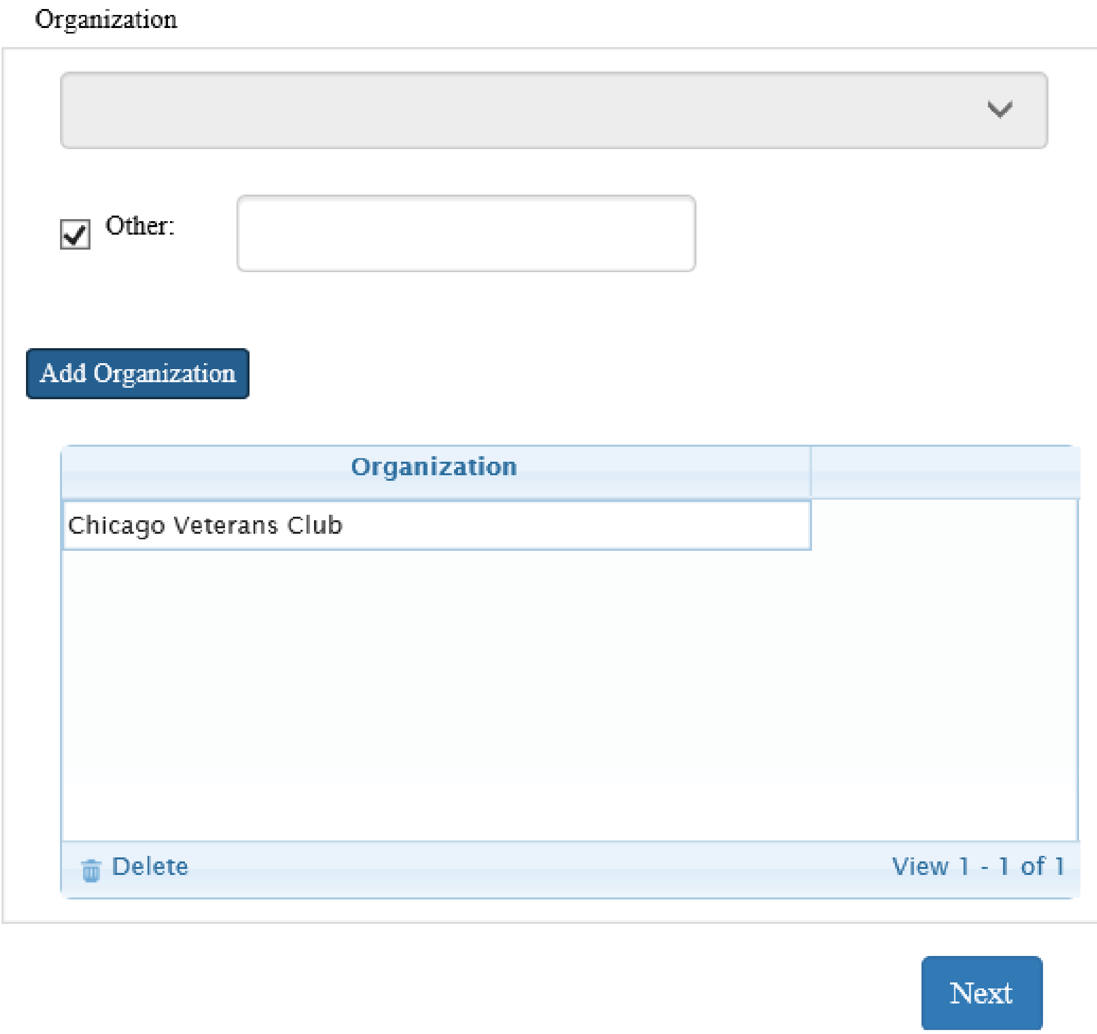
8. At least one organization is required. If you do not select or enter an organization and *click* the **Next** button, you will receive the following error message:

Organization Error Message



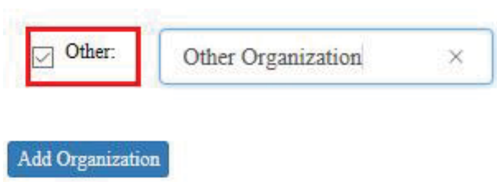
9. Your organization will be added to the Organization table shown below:

Organization Table



10. If your organization(s) is/are not listed in the drop down, *check* the **Other** checkbox and *type in* your organization's name in the text box. Your organization will be added to the Organization table as shown below:

Add Other Organization



11. To delete an organization, *highlight* the organization you wish to remove and *click* the **Delete** button in the Organization table. This will remove the organization from your list.

Once you have entered all of the information, *click* the **Next** button and you will be returned to the user identification splash screen.

The contractor will click on the Contractor button and then be sent to their DM360 home screen.

3 Workflow Basics

The following subsections provides information regarding the content toolbar, aggregate and Regional Office (RO) queues, work group assignments, displaying work queue contents, results grid columns, and workflow indicators.

3.1 Content Toolbar/Workflow Home

When you open the D360 Portal, the Content Toolbar/Workflow Home Screen is displayed (Figure 5).

Figure 5: Content Toolbar

NOTE: *Work queues available to the Basic User are "Hold" and "Work".*

Table 1 describes the Content Toolbar options.

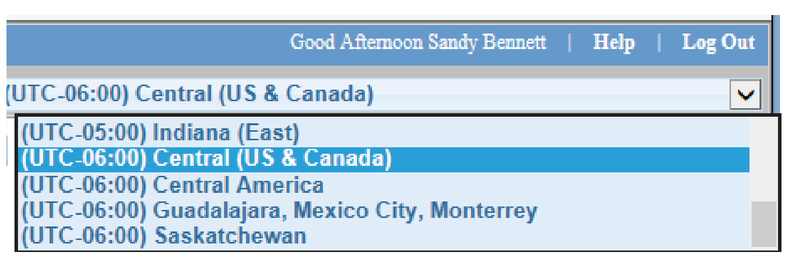
Table 1: Content Toolbar Options

Menu	Description
Search	Enables user to filter on the document index value to retrieve a document (if user has permissions).
Workflow	Enables user to view and work the documents/packets within assigned queues.

3.2 Setting the Time Zone

Select the local time from the **Time Zone** dropdown menu, located at the top right of the workflow screen, to confirm that the data displays in the correct time zone (Figure 6).

Figure 6: Setting Time Zone

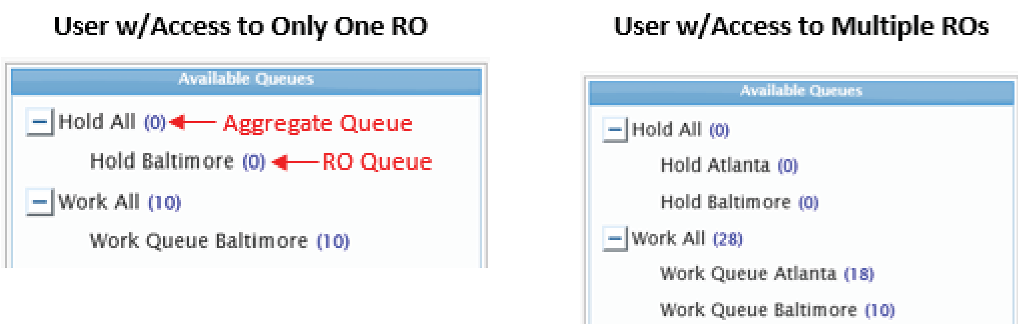


3.3 Aggregate vs. RO Queues

Figure 7 shows the Aggregate and RO queues available to Basic users. The Work and Hold queues will contain the same work, unless you have permissions to access packets for more than one RO. Either queue can be used to process work.

Aggregate queues will enable you to work from a single queue to address all RO work that falls under that Aggregate category. Some users will only see one RO queue under each Aggregate queue, while others will have access to multiple ROs.

Figure 7: Aggregate vs. RO Queues



3.4 Work Group Assignments

Basic Users are assigned to specific work groups. Anyone holding Basic User permissions will see the following work groups:

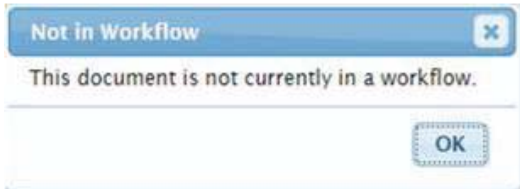
- **Hold**: Contains packets that are placed on hold, such as packets requiring additional information to be supplied to the VA for continued processing.
- **Work**: Contains new packets pending processing. A Super User within a given RO will assign these documents to a specific user.

The total number of available packets in a work queue is indicated in blue (Figure 8).

Figure 8: Available Documents Indicator

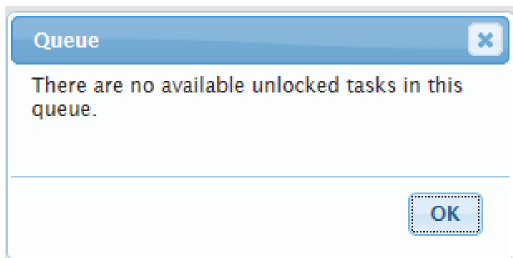
NOTE: *<u>You may only open and work packets assigned to you</u>. Trying to open a packet assigned to another user will result in the following error message (Figure 9).*

Figure 9: Not In Workflow Message



When there are no packets available in a given queue, the following message displays (Figure 10).

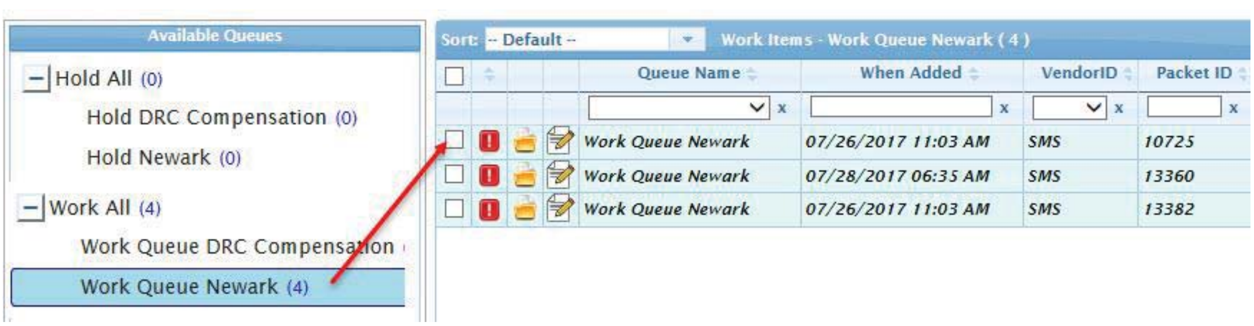
Figure 10: Unlocked Tasks Message



3.5 Displaying Work Queue Contents

Single-click the **box** to the left of the queue name to display the Work Queue content. All work packets are displayed in the Results Grid on the right (Figure 11).

Figure 11: Work Queue Contents



3.6 Results Grid Columns

Click or *drag* the **Result Grid Columns** to a different location to rearrange them. To adjust column widths, place your mouse over the line to the right of the column, *left-click* your **mouse**, and *drag* the **line** to the desired width. These adjustments will be saved upon logging out and logging back in. (Figure 12).

Figure 12: Results Grid Columns

3.7 Workflow Indicators

Workflow indicators for unopened packets are displayed in bold, italics, underlined and have background coloring, as shown in Figure 13.

Figure 13: Workflow Indicators

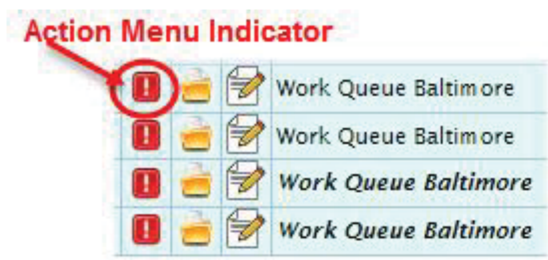


Table 2 provides a description of the workflow indicators.

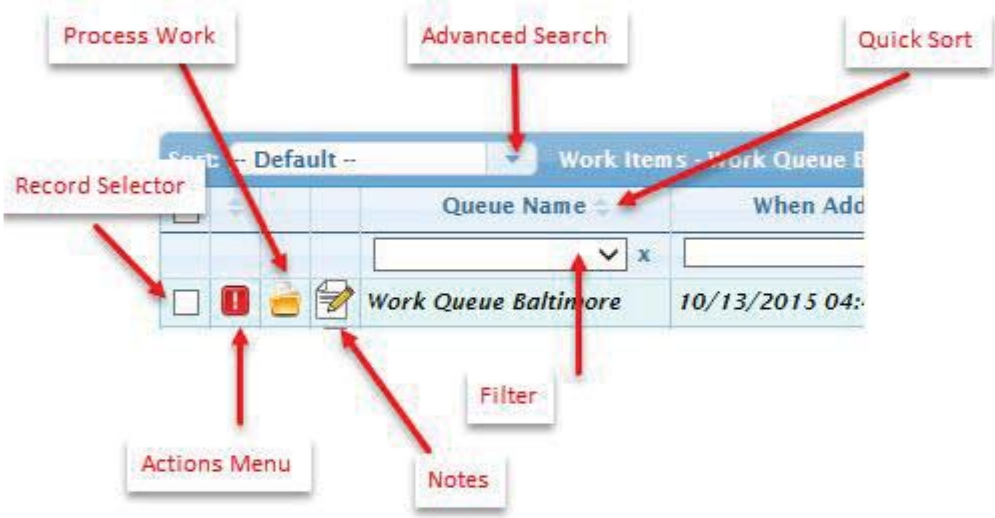
Table 2: Workflow Indicator Descriptions

Indicator	Description
Bold and Italic	Packet is 'New'. Packet has not been opened.
Bold, Italic and Underlined	Packet is 'Unread'. Assigned user has not opened this packet. Another user may have opened the packet previously or another user currently has the packet opened.
Normal text	Packet is 'Read'. A user has previously opened this packet.
Light Blue background	Packet is 2+ business days old since it was uploaded into DMHS.
White background	Packet is less than 2+ business days old since it was uploaded into DMHS.
Red Action Menu indicator	Packet is 2+ business days old since uploaded into DMHS.
Non-Red Action Menu indicator	Packet is less than 2+ business days old.

3.8 Results Grid Features

Figure 14 shows the Results Grid Features and their actions. The following subsections describe each feature.

Figure 14: Results Grid Features



3.8.1 Actions Menu

Figure 15 displays the Actions Menu options for Basic Users.

Figure 15: Actions menu

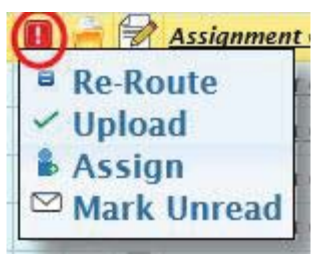


Table 3 lists the Actions Menu options and their descriptions.

Table 3: Actions Menu Options

Option	Description
Re-Route	Moves the packet to the Re-Route Queue where a Super User authorizes and re-assigns to the appropriate RO.
Upload	Initiates the upload of documents within a packet to the Veterans Benefits Management System (VBMS).
Assign	Assigns the packet to another RO and/or user.
Mark Unread	Marks the packet as ‘Unread’. Packet has never been viewed by a user.

3.8.2 Record Selector

The Record Selector box enables users to select one or more work packets prior to an action being taken. Press *Shift+Click* to select contiguous rows and *Ctrl+Click* to select non-contiguous rows. To select a single row, *click* the **row** you wish to select (refer to Figure 14).

3.8.3 Process Work

Click the **folder** icon to open the associated work packet in the work processing window (refer to Figure 14).

3.8.4 Notes

Click the **Notes** icon to enter do level notes (refer to Figure 14).

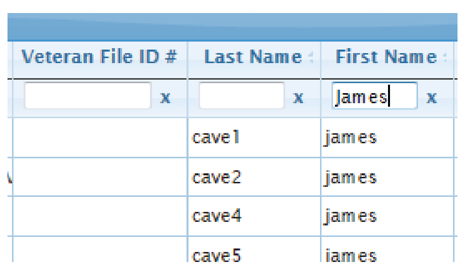
3.8.5 Filter

Configurable result fields include filtering capabilities. The filter option may be used to narrow the returned results. The type of data present in the results field determines the type of data that must be entered into the window. *Press* **Enter** to apply the filter and "**x**" to remove the filter (Figure 16).

Figure 16: Filter Field

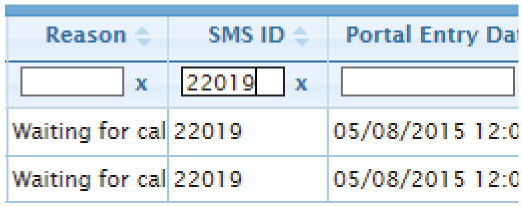
When filtering on text fields, results returned match the text entered in the filter window, as shown in Figure 17.

Figure 17: Text Fields



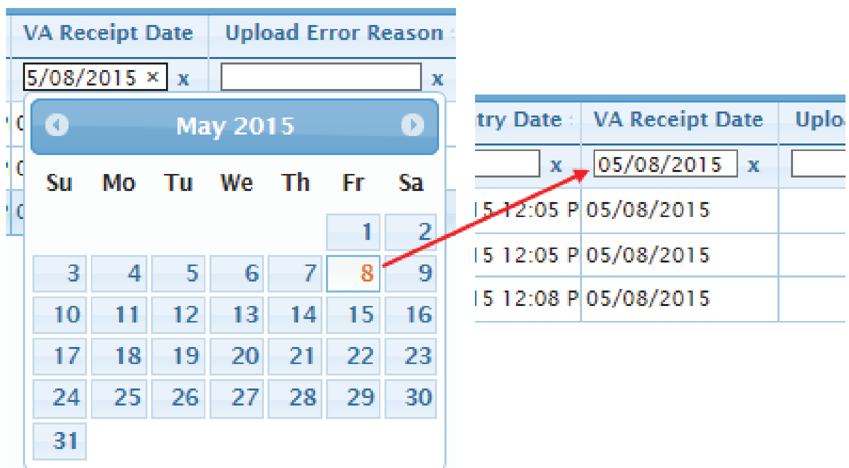
When filtering on numerical fields, results returned match the numbers entered in the filtered window, as shown in Figure 18.

Figure 18: Numerical Fields



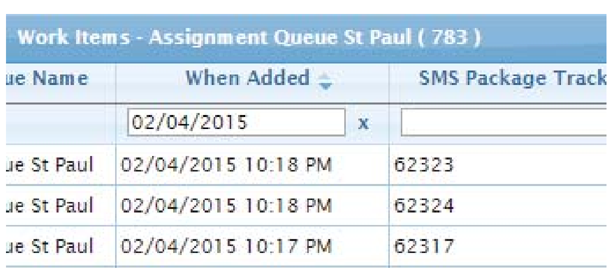
To filter a date, *click* in the **Date Filter** window; a calendar opens. S*elect* a **date**. You also may manually enter a date and *press* **Enter** (Figure 19).

Figure 19: Date Field



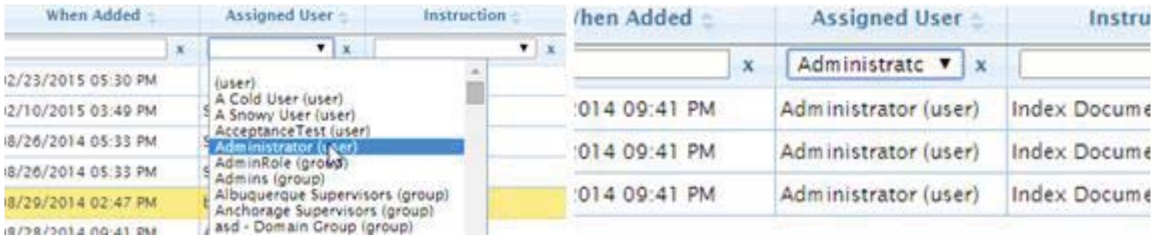
To filter on a date/time field (When Added field), follow the instructions above for entering data in the Date field. Time zones are automatically applied (Figure 20).

Figure 20: Date/Time Field



To filter on a user or user group based on their System Identification (SID), *select* the user from the **Assigned User** dropdown list. The results will match what was selected. (Figure 21).

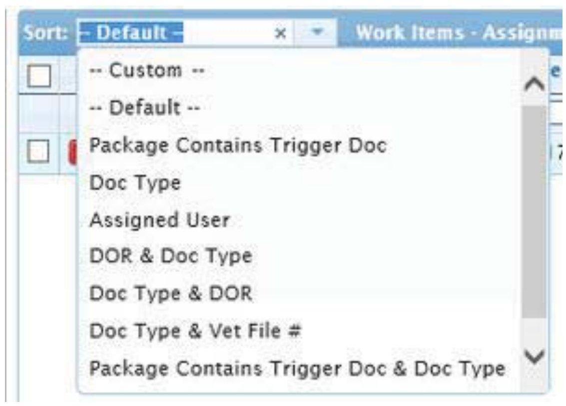
Figure 21: Assigned User Field



3.8.6 Advanced Sort

Click the **Advanced Sort** dropdown arrow to display a list of pre-defined sort options (Figure 22).

Figure 22: Advanced Sort Dropdown



The description and explanation of each sort type is displayed in Table 4.

Table 4: Sort Descriptions

Sort Type	Sort Order Description
Custom	Re-arrange fields and have custom order automatically saved after logging out and back in.
Default	Default grid view of fields.
Packet Contains Trigger Doc	All with Trigger Document (First In/First Out [FIFO] order), then all else (FIFO order).
Doc Type	Descending order by document type.
Assigned User	Ascending order (name is stored as a single field and sorts are based on First Name).
DOR & Doc Type	Date of Receipt (DOR) (ascending) then by document type (descending).
Doc Type & DOR	Document type (descending) then by DOR (ascending).

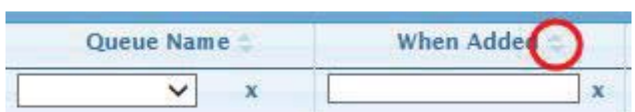
Sort Type	Sort Order Description
Doc Type & Vet File #	First: Document type (descending) with Veteran File Identification Number.
	Second: Document type (descending) with no Veteran File Identification Number.
	Third: No document type with Veteran File Identification Number (ascending).
	Fourth: No document type, no Veteran File Identification Number (FIFO order).
Packet contains Trigger Doc & Doc Type	Trigger documents listed (FIFO order).
Packet contains Trigger Doc & DOR	Trigger documents: Each received date (group) will be sorted in FIFO order, then remaining documents in FIFO order.

To Remove the filter, *click* **Default**, which is located at the top of the list.

3.8.7 Quick Sort

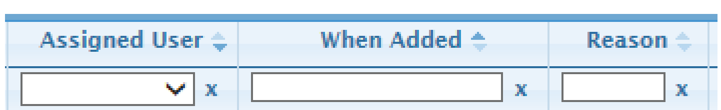
Click the **double arrow** (Figure 23) in the column header to sort results in ascending order. *Click* the **double arrow** in the column header a second time to sort in descending order. *Click* the **double arrow** in the column header a third time to have no sort order.

Figure 23: Quick Sort Button



Multiple columns may be sorted simultaneously, with precedence taking place from left to right. Move the Assigned User column to the left, and the customized sort order is retained (Figure 24).

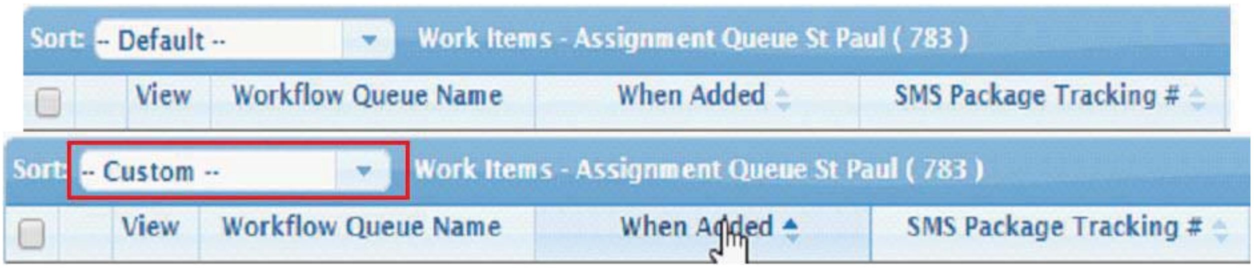
Figure 24: Moving Sorted Columns



3.8.8 Custom Sort

Any time a user creates a custom sort or reorders columns, the Sort dropdown menu label changes to '--Custom--' (Figure 25). A custom sort is saved according to what is shown by the sort icons and will not inherit any of the sorts defined by the administrator.

Figure 25 : Custom Sort Example



Select "-- **Default** --" from the sort dropdown (Figure 26) to restore the default setting. *Select* "-- **Custom** --" to switch back to the last custom setting. The last custom setting will be chosen by default. All other predefined sorts behave as normal.

Figure 26: Restore Default Setting

NOTE: *Contact your Administrator if you would like your custom sort removed.*

3.9 Paging Options

Paging options are located at the bottom-middle of the Grid View screen and provide several options to maneuver through multiple pages of results (Figure 27).

Figure 27: Paging Option

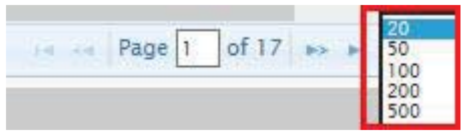
Paging options include:

- *Click* the **forward/backward double arrows** to scroll one page at a time.
- *Click* the **arrow with a line** to go to first or last page of work packets.
- *Enter* a **page number** in the 2-digit numeric field and *press* **Enter** to move to that page.
- *Click* the **dropdown arrow** to change number of rows displayed (default is 20).

3.10 Record Display Default

The Results Grid will display, by default, the first 20 records returned within a queue. To change the number of records displayed, *select* the **dropdown arrow** and the desired number of records (Figure 28). You may choose to review 20, 50, 100, 200, or 500 records. We suggest that you keep the default at 20 to optimize system performance. The new default will remain selected until changed again.

Figure 28: Record Display Dropdown



4 Packet Level Processing

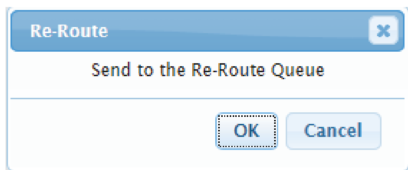
The subsections below describe the process for Re-Routing work.

4.1 Re-Routing Work

Basic Users may send packets to the Re-Route queue using the following steps:

1. Under Available Queues, *select* the **work queue** for the appropriate RO. The work queue contents will display (refer to Figure 11).
2. *Click* the **checkbox** to the left of each desired work packet. C*lick* the **Actions menu** icon to the right of one of the checkboxes. The Action menu displays (refer to Figure 15).
3. *Click* **Re-Route**. The Re-Route action message appears (Figure 29).

Figure 29: Re-Route Message



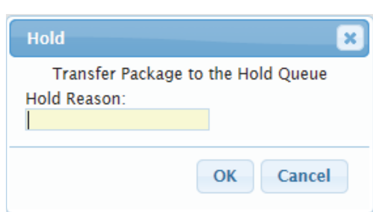
4. *Click* **OK**. The selected work packets are now sent to the Reassign queue.

4.2 Putting Work on Hold

Basic users may send work packets to a temporary holding queue. Packets are placed in the temporary holding queue if additional documentation is required for the packet or if the user needs assistance with properly working the packet. Perform the following steps to place work on hold:

1. Under Available Queues, *select* the work queue for the appropriate RO. The work queue contents will display (refer to Figure 11).
2. *Click* the **checkbox** to the left of each desired work packet. C*lick* the **Actions menu** icon to the right of one of the checkboxes. The Action menu displays (refer to Figure 15).
3. *Select* **Hold**. The Hold message window appears (Figure 30).

Figure 30: Hold Message



Enter data in the **Hold Reason** field and *click* **OK**. The selected work packets are sent to the Hold queue.

5 Document Level Processing

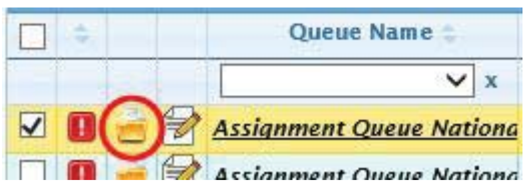
Document Level Processing is described the subsections below.

5.1 Opening a Work Packet

To open a work packet, perform the following steps:

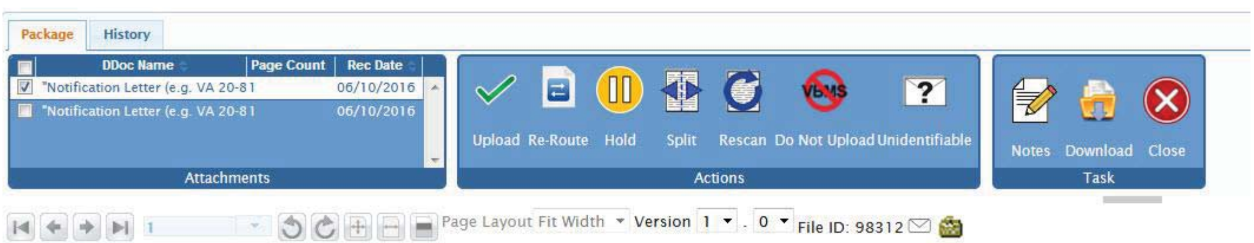
1. *Select* the queue for the packet you wish to open (refer to Figure 11).
2. *Select* the **checkbox** to the left of desired work packet. *Click* the **Folder** icon (Figure 31).

Figure 31: Work Queue Folder



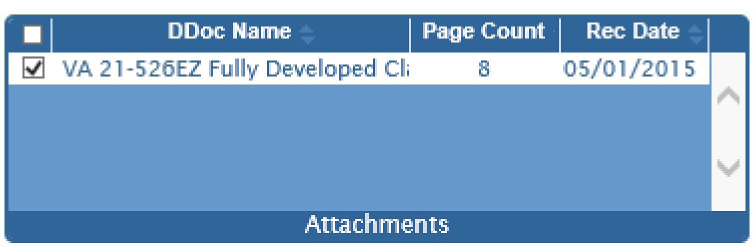
3. The Document Processing window opens, as shown in Figure 32.

Figure 32: Document Processing Window



The Attachments Grid is displayed in the upper left-hand corner of the screen, as shown in Figure 33.

Figure 33: Attachments Grid



5.1.1 Attachments Grid

The Attachments Grid provides a view at the document level. Columns include:

- DDoc Name: Shortened version of document name.

- Page Count: Number of pages in packet.
- Rec Date: Document received date.

***NOTE**: More than one work document can be opened at once by using shift-click.*

***NOTE**: You can view multiple documents within a work packet but can only perform an action on <u>one document</u> at a time.*

To sort documents in ascending/descending order, *click* the **arrows** that appear to the right of a column heading in the Attachments Grid (Figure 34).

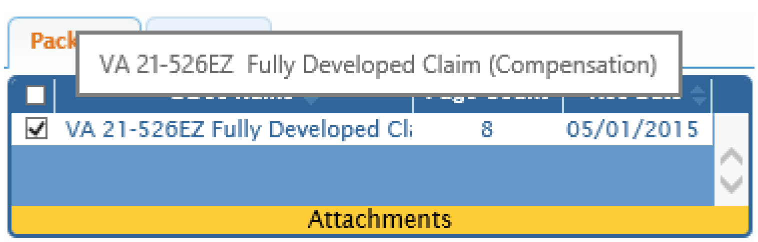
Figure 34: Attachment Grid Sorting

To resize column widths, *hover* the cursor over the **right line** of a column heading until a double-arrow appears. Drag to the right to make wider or to the left to make narrower.

5.1.2 View Full Document Name

The DDoc Name field is often too narrow to accommodate the full document name. To display the full document name, hover the cursor over the value in the DDoc Name column. The full name displays as shown in Figure 35.

Figure 35: View Full Document Name



5.2 Show/Hide Thumbnails

To show/hide thumbnails, *click* the **gray shaded** panel bar. *Click* again to reverse the action (Figure 36).

Figure 36: Show/Hide Thumbnail View

5.3 Work Processing Toolbar

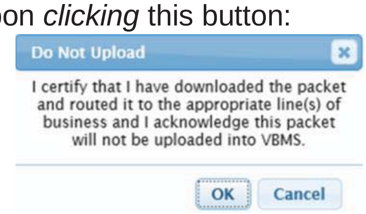
The Work Processing Toolbar displays the type of packet processing that can be performed (Figure 37).

Figure 37: Work Processing Toolbar

NOTE: *All options available in the Work Processing toolbar perform functions at the packet level, not document level.*

Table 5 describes the toolbar work processing buttons.

Table 5: Work Processing Buttons

Button	Description for Actions Window
Upload	Initiates the upload of documents within a packet to VBMS.
Re-Route	Moves the packet to the Re-Route Queue where a Super User authorizes and re-assigns to the appropriate RO.
Split	When multiple Veterans are co-mingled within the same packet, will route packet to scan vendor to separate Veterans into multiple packets.
Rescan	Sends the document to the authorization queue for supervisory action.
Do Not Upload	Marks the packet as complete and is not upload into VBMS. The following message will appear upon *clicking* this button:  Do Not Upload I certify that I have downloaded the packet and routed it to the appropriate line(s) of business and I acknowledge this packet will not be uploaded into VBMS. OK Cancel
Unidentifiable	Marks the packet as Unidentifiable Mail and routes it to the next line of approval by a Supervisor.
Notes	Enables the user to enter 'packet' level comments that apply to all associated packets. Turns yellow if notes have been added.

Button	Description for Actions Window
Download	Creates a Zip file of a PDF of all documents for current packet.
Close	Closes the packet and returns the user to the Results Grid.

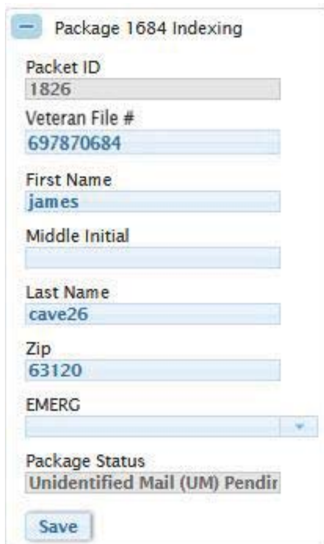
5.4 Indexing

The following subsections describes the process of Packet Level Indexing.

5.4.1 Packet Level Indexing

Packet indexing appears with Document Indexing on the right side of the Work Processing window (Figure 38).

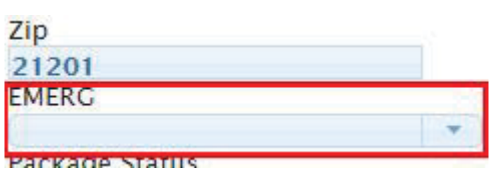
Figure 38: Packet Indexing Fields



5.4.2 Emergent Claim Indicator (EMERG)

To tag a packet using the 'Emergent Claim Indicator (EMERG)' as an 'Emergent' claim, *assign* a code to the packet via the **EMERG** dropdown menu (Figure 39).

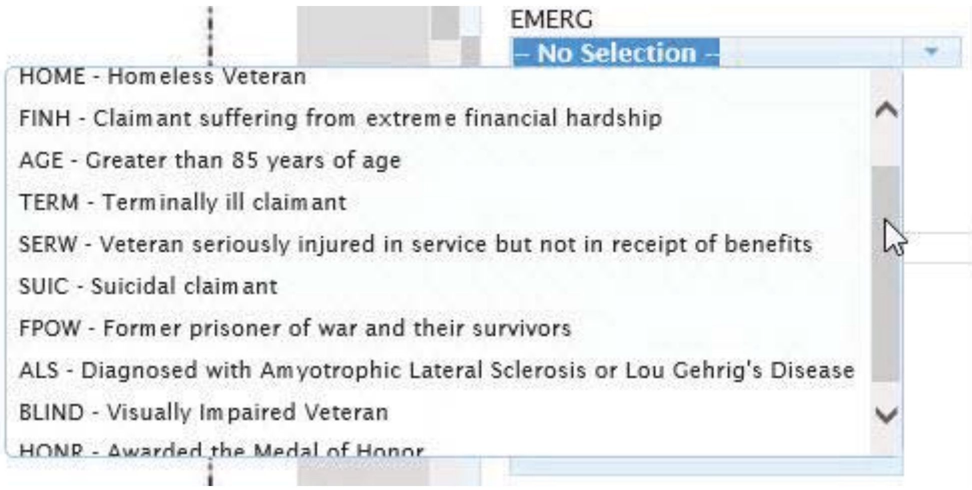
Figure 39: Emergent Field Dropdown



Perform the following steps to assign an Emergent Code:

1. *Click* the **EMERG** dropdown arrow and *select* a **code** from the list. Once selected, the code will display in the EMERG field (Figure 40).

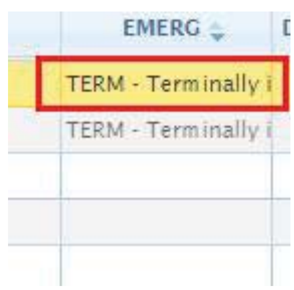
Figure 40: Emergent Claim Designation



2. *Click* **Save**.
3. *Click* **Close** to return to the Packet Level Indexing.

The Emergent code is displayed in the EMERG column in the Packet Level Indexing, as shown in Figure 41.

Figure 41: EMERG Code Displayed



5.4.3 Document Indexing

Figure 42 displays the Document Indexing Fields.

Figure 42: Document Indexing Fields

5.5 History Tab

The History tab provides a historical record of the path the packet has taken when it was initially assigned to completion and activated in the system (Figure 43).

Figure 43: History Tab

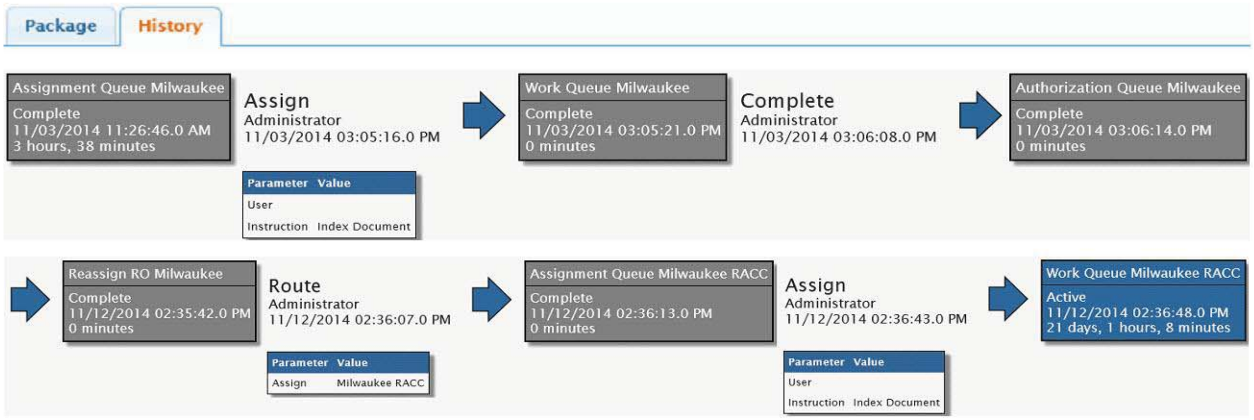


Table 6, Workflow History, describes each process.

Table 6: History Workflow

Box	Description
Gray Boxes	Details where the work packet has been, including date and time of completion and how long it took.
Black Text	Displays the action taken from the prior queue, including who took action, date and time.
Blue/White Boxes	Details who the work packet was sent to and what changes were made.
Blue Boxes	Details where the work packet is at current date and time.

NOTE: *You may view a packet's history even if completed and/or uploaded.*

5.6 Document Viewer Toolbar & Hot Keys

The document toolbar and hot keys are shown in Figure 44.

Figure 44: Document Viewer Toolbar

The following subsections describe the image navigation, rotate image, zoon, brightness and contrast, page layout/fit width, version number, and document history functionality available in the document viewer.

5.6.1 Image Navigation

To use image navigation, *click* the **arrow** buttons to navigate between documents (Figure 45). Use the page number selector to jump to a specific page.

Figure 45: Image Navigation

5.6.2 Rotate Image

To rotate the image, *click* the rotate buttons to turn the pages within the document (Figure 46). Rotating an image only affects the view of the document as displayed to the current user and does not change the underlying file.

Figure 46: Rotate Image

5.6.3 Zoom

Perform the following steps to perform zoom functions:

1. *Click* the “**Fit All**” button to see entire document (Figure 47).

Figure 47: Zoom - Fit All Button

2. *Click* the “**Fit Width**” button to expand width to entire width of view (Figure 48).

Figure 48: Zoom - Fit Width

3. Use the page layout drop down menu to choose view percentage (Figure 49).

Figure 49: Zoom - Page Layout - Fit Width

5.6.4 Brightness and Contrast

To adjust the brightness and contrast, *click* the **Adjust Brightness and Contrast** (Figure 50).

Figure 50: Brightness and Contrast

5.6.5 Version Number

Click the **Version** dropdown menu to select a previous version of the document (Figure 51). This applies when the original image file is modified.

Figure 51: Version Number

5.6.6 Document History

To display all activity that has occurred regarding the document, *click* the **Document History** icon (Figure 52). This action also has the option to convert to a .csv format for further customization.

Figure 52: Document History

5.7 Hot Keys

Use the hot keys listed in Table 7 to navigate through the various images within a document.

Table 7: Hot Key Descriptions

Hot Key	Action
Ctrl + 1	Zoom to 10%
Ctrl + 2	Zoom to 30%
Ctrl + 3	Zoom to 50%
Ctrl + 4	Zoom to 70%
Ctrl + 5	Zoom to 100%
Ctrl + 6	Zoom to 120%
Ctrl + 7	Zoom to 140%
Ctrl + 8	Zoom to 160%
Ctrl + 9	Zoom to 180%
Ctrl + Pg Up	Previous Page
Ctrl + Pg Dn	Next Page
Ctrl + Home	First Page
Ctrl + End	Last Page

6 Search Function

The Search function is used to search for a *specific work packet* and <u>is not</u> intended as the primary method for opening and modifying work packets (Figure 53).

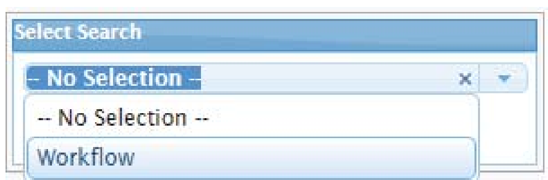
Figure 53: Search Function

6.1 Search for Results

Perform the following steps to conduct a search and return results:

1. *Select* **Search** to display the Select Search Window. S*elect* **Workflow** from the dropdown to display a list of search fields (Figure 54).

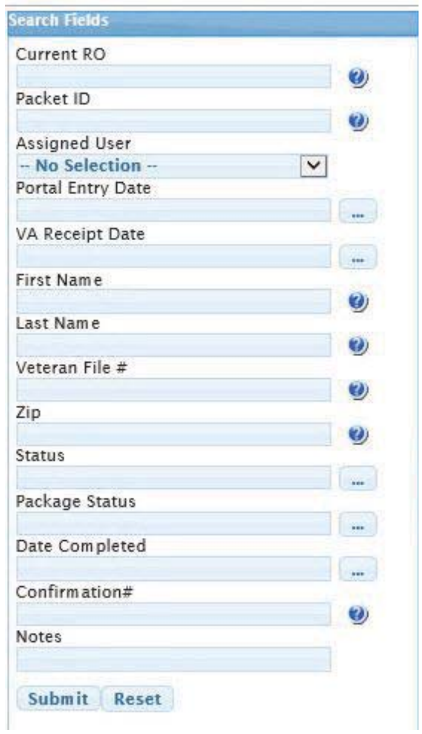
Figure 54: Select Search Window



NOTE*: To set* ***Workflow*** *as the default, click the ‘****Set Default****’ button.*

2. *Enter* the search parameters in the **Search fields** (Figure 55).

Figure 55: Search Fields



3. *Click* **Submit** to perform the search.

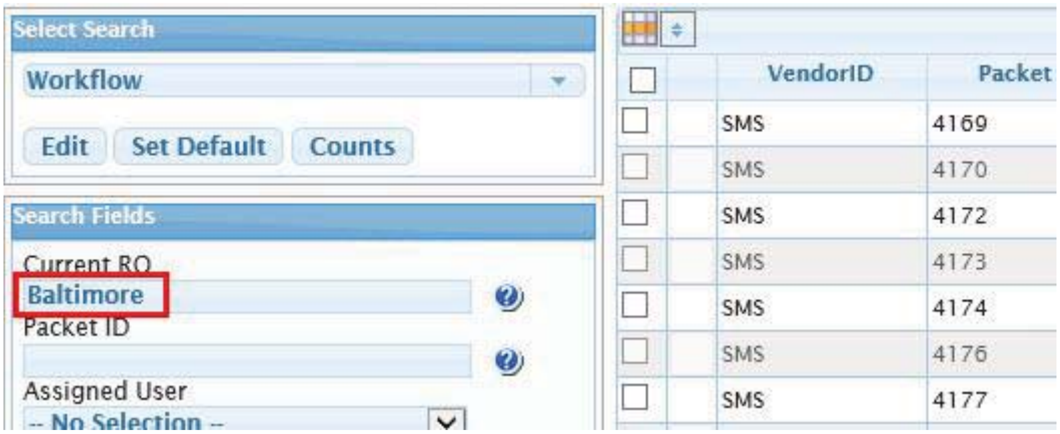
Table 8 provides a description of the Search Fields.

Table 8: Search Field Definitions

Search Field	Definition
Current RO	Only packets for User's RO will display.
Packet ID	The packet's ID number.
Assigned User	If using Assignment or Authorization queue, can search on group. If specific person, will list what's assigned to them.
Portal Entry Date	Date the packet was uploaded to the portal.
VA Receipt Date	Date the VA received document in packet.
First/Last Name	Veteran's First and Last Names
Veteran File #	Veteran's File Identification Number
Zip	Veteran's Zip Code
Status	Used to search for packets that are resolved/unresolved.
Packet Status	Current status of the Veteran's packet.
Date Completed	Date the packet was completed.
Confirmation #	Confirmation number assigned to direct uploaded packets.
Notes	Any notes pertaining to the packet.

4. Search Results are returned (Figure 56).

Figure 56: Search Results



***NOTE**: Search results may open in a new window and require "enable Pop-ups" for the second window to execute.*

6.1.1 Packet Status

To select the packet status, *click* the **button** and *select* one or more statuses from the list (Figure 57).

Figure 57: Packet Status

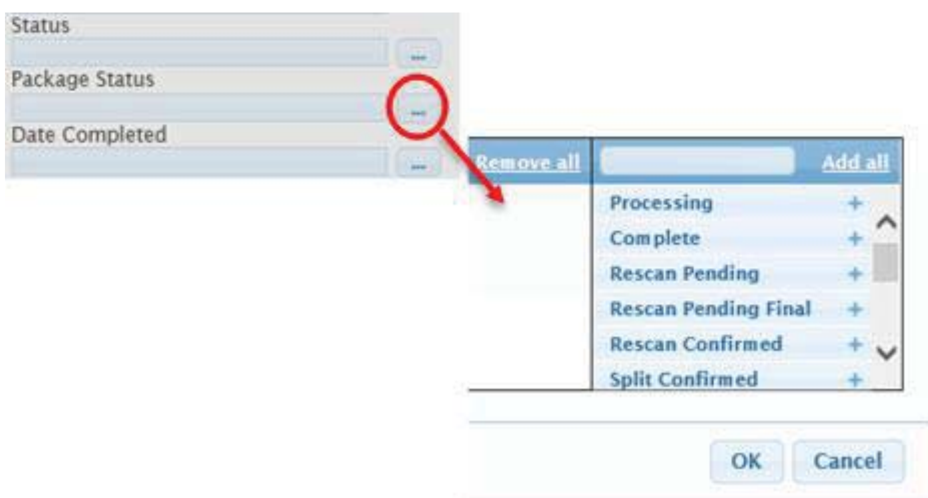


Table 9 provides a description of the packet status.

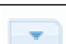
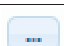
Table 9: Packet Status Descriptions

Status	Description
Processing	A Packet has been assigned to a user and it's currently in process.
Complete	A packet has been processed and uploaded to VBMS.
Upload Failed	The packet has failed to upload to VBMS.
Rescan Pending	A user has requested packet to be rescanned and the packet is currently pending on Super User's decision.
Rescan Pending Final	A Super User has approved a user's request for rescan and packet is pending COR's authorization.
Rescan Confirmed	A COR has approved the rescan request.
Split confirmed	A Packet has been split.
Failed to Upload	Disabled
Unidentified Mail (UM) Pending	A user has approved the packet as unidentifiable and the packet is currently pending supervisor's decision.
Unidentified Mail (UM) Confirmed	Supervisor has approved the packet as unidentifiable and packet is pending RMO auth.
Unidentified Mail (UM) Final	RMO has approved the packet as unidentifiable.
Pending Upload	A packet is pending upon on being uploaded.

6.2 Search Field Buttons

The button to the right of each field provides input tips or pre-determined values to aide in entering the correct data for that field. Table 10 lists each button and its associated description.

Table 10: Search Field Button Descriptions

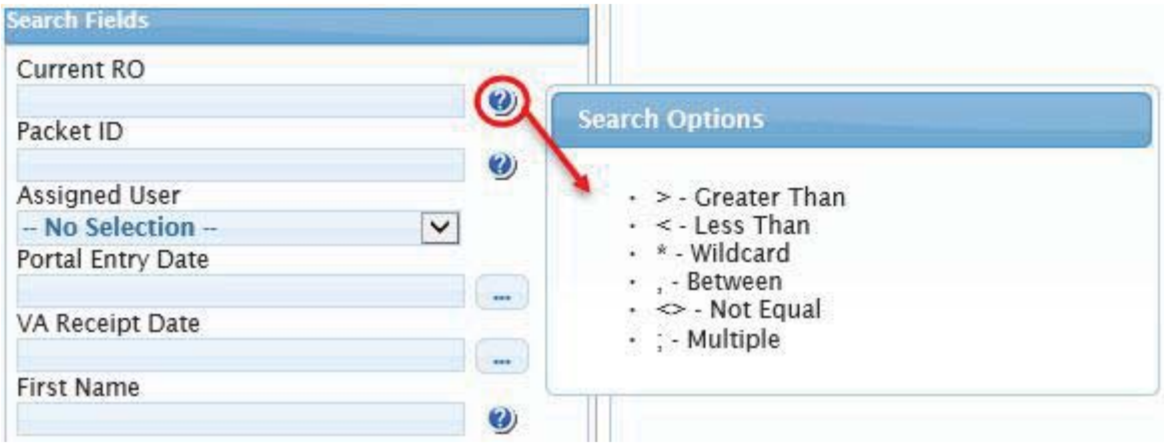
Button	Description
	When clicked, displays a list of wild card characters and operators that can be used alongside values entered into the search fields.
	When clicked, enables the user to select a single text value from a dropdown list.
	When clicked, enables the user to select a value from a pop-up window.

6.3 Wild Card Characters & Operators

The question mark search field button provides wild card character and operator suggestions to help narrow the search (Figure 58).

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

Figure 58: Wild Cards & Operators



6.4 Date Selector Pop Up

Click the ... **button** next to a date field to display a pop-up window to select a pre-defined date or *enter* a **date range** to apply to the search (Figure 59).

Figure 59: Date Selector Pop Up

6.5 Search Tips

Use the following tips when performing a search:

- Wildcards (*) only apply to strings. No results are returned for date, time, and integers.

- Entering just a value into a field will only search for that exact value.
- Entering in an expression that starts with an operator (<, >, <>) will trigger interpretation of the value as a 'search expression'.

  ***NOTE**: When using expressions, results take longer to return than exact value filters.*
- Less than (<) and greater than (>) only apply to date, time and integers. Equal/not-equal applies to all values.
- A string search does not require "_", except when it may contain control characters. Example: "Hello, my name is". The comma after Hello is a control character.
- Strings can contain a wildcard character to do a partial match, i.e. *Hello*.
- Dates should be entered as Month/Day/Year or Month-Day-Year. Either '/' or '**-**' can be used as a separator (it does not have to be consistent). A date is considered a time range for the entire day.
- Time should be entered as Month/Day/Year Hour:Minute:Second.Millisecond (am or pm). Either '/' or '**-**' can be used as a separator (it does not have to be consistent). Minute, second, millisecond and am/pm are all optional. If omitted, defaults to 0 and am. Times must be an exact match. If a range is desired, use a comma or enter a date.
- A range of values uses a comma separator, i.e. 1,5 or 1/1/2012,5/1/2012
- A list of possible values use a semi-colon separator, i.e. 1;2;3;4;5 or 1/1/2012;1/15/2012;1/20/2012

6.6 Select Search Buttons

Upon selecting the search criteria, three additional options are available (Figure 60) to save/edit the search.

Figure 60: Select Search Buttons

Table 11 describes the search option features.

Table 11: Search Options

Button	Description
Edit	Displays the Edit User Searches window and enables the user to save a customized user search (more info in next section).

Button	Description
Set Default	Set the current customized search as the default search to display upon log in. Once a default has been set, *click* the button again to clear it as desired.
Counts	Displays the Search Result Counts window. Shows the quantity of documents available according to document type.

6.7 Saving a Custom Search

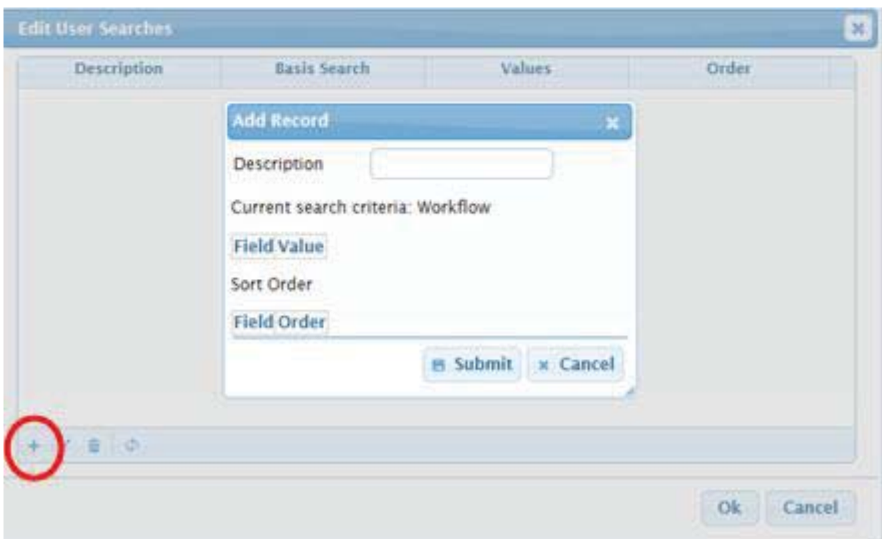
At times, it may be beneficial to save a search you have customized to be used later. User searches can be saved and are automatically added to the Select Search dropdown list.

***NOTE**: User searches are labeled with a '(user)' suffix.*

Perform the following steps to save a search:

1. *Click* the **Edit** button (refer to Figure 60). The **Edit User Searches** window appears.
2. *Click* the **"+"** sign. The **Add Record** window appears (Figure 61).

Figure 61: Add Record



3. *Type* a **Description** for the search.
4. *Click* the **Submit** button. The search is now added to the User Searches window.
5. *Click* **Ok**. The search displays at the bottom of the dropdown list.

6.8 Results Grid Features

The search field results from the Search Field window will be displayed in the Results Grid. Using the results grid features, the search results may be sorted, the actions menu may be selected, and the results may be exported to .csv format (Figure 62).

Figure 62: Results Grid Features

Table 12 describes the results grid features.

Table 12: Results Grid Descriptions

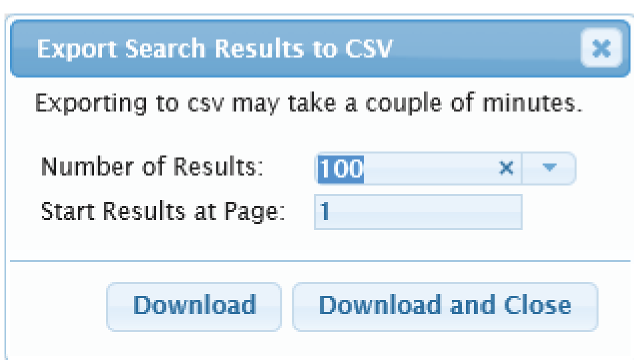
Feature	Description
Export to CSV	Exports results into .csv format.
Select Sort Order	Add/remove specific sort criteria within the Results Grid.
Actions Menu	Enables the user to perform specific actions on the item selected.

6.8.1 Export to CSV

To define the number of results returned and the results start page prior to export using the Export to CSV feature, perform the following steps:

1. *Click* the **Export to csv** button. The Export window appears (Figure 63).

Figure 63: Export to CSV



2. *Select* the **number of results** you want returned and the start page for the results.
3. *Click* **Download** for multiple pages or **Download and Close** if the first download returns enough results.

NOTE: The higher the number of results, the longer it will take for results to be returned.

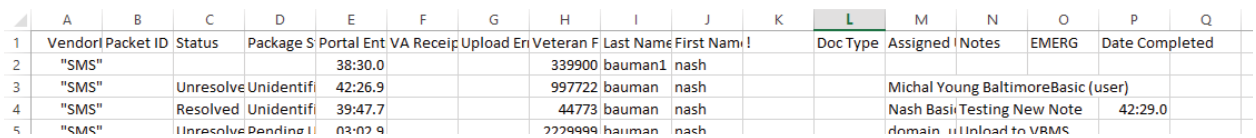
4. After a few seconds, a bar will display asking to open or save the CSV report. *Click* **Open** to display the report in **Excel** or *click* **Save** to save it to a file drive (Figure 64).

Figure 64: Open or Save CSV Report

NOTE: *The '**Start Results at Page**:' field will automatically advance a page after results are returned. <u>Do not click the **Download button** again until you have opened or saved the current download results</u>.*

5. Search results display in CSV format, as shown in Figure 65.

Figure 65: Sample CSV Report Results



	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q
1	VendorI	Packet ID	Status	Package S	Portal Ent	VA Receip	Upload Er	Veteran F	Last Name	First Nam	!	Doc Type	Assigned	Notes	EMERG	Date Completed	
2	"SMS"				38:30.0			339900	bauman1	nash							
3	"SMS"		Unresolve	Unidentifi	42:26.9			997722	bauman	nash			Michal Young	BaltimoreBasic (user)			
4	"SMS"		Resolved	Unidentifi	39:47.7			44773	bauman	nash			Nash Basi	Testing New Note		42:29.0	
5	"SMS"		Unresolve	Pending U	03:02.9			2229999	bauman	nash			domain_u	Upload to VBMS			

6. *Click* the **'X'** in the upper right-hand corner of the Export window to close the feature.

6.8.2 Search Actions Menu

Click the **Actions Menu** button to display the Search Actions Menu (Figure 66).

Figure 66: Search Actions Menu

Table 13 lists the menu options and their descriptions.

Table 13: Actions menus

Menu Option	Description
History	Shows the document's history.
Notes	Creates a note that includes user ID and date. *This note will stay with the packet; however, only the last packet note added will be displayed and be visible in Search Grid View or Workflow Grid View results.*
Perform Work	Opens the document for processing. *Displays* document in full screen mode and opens Image Viewer from the Workflow Queue location.

7 Watermarks

The standard watermark included in all images is displayed in Figure 67. This includes the DOR at the Scan Site and Location.

Figure 67: Standard Watermark

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

The 'Best Copy' annotation (Figure 68) also will be applied when applicable, such as when the image cannot be enhanced further for legibility or if the original source contains any loss of data.

Figure 68: Best Copy Watermark

BEST COPY

Additional watermarks for the PMR process include the Scan Date, which may or may not be the same as the DOR at the scan site, and a PMR Program Referred designation (Figure 69).

Figure 69: Scan Date Watermark

ScanDate: 09/25/2014 – PMR PROGRAM REFERRED

Every PMR document that is marked 'best copy' based on business rules will have the full watermark, as shown in Figure 70.

Figure 70: Full Watermark

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

Any non-PMR document will have the following watermark ('best copy' added when driven by business rules), as shown in Figure 71.

Figure 71: Non-PMR Document Watermark

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

8 Acronyms

The following lists the acronyms and their descriptions.

Acronym	Definition
DMHS	Digitized Mail Handling Services
DNP	Do Not Process
DOR	Date of Record
EMERG	Emergent
FIFO	First In First Out
LTS	Long-Term Storage
PIN	Personal Identification Number
PIV	Personal Identification Verification
RO	Regional Office
SID	System Identification
VA	Department of Veteran Affairs
VBMS	Veterans Benefits Management System