

Veterans Benefits Administration

Document Conversion Services

Centralized Mail Processing

Document Exception Portal User Manual

Version 2.0



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1. URL Address & Technical Support

1.1. Production Link

Production Environment Link:

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

2. Log In

2.1. Login

Enter the Username and Password assigned and select “Log On”.

Figure 1: Collybus System login



Reset Password:

Left Click: Forgot Password

The system will send a temporary password to the user’s email account associated to the user logon.

Copy and Paste the temporary password into ‘Password’

Left Click ‘Log On’

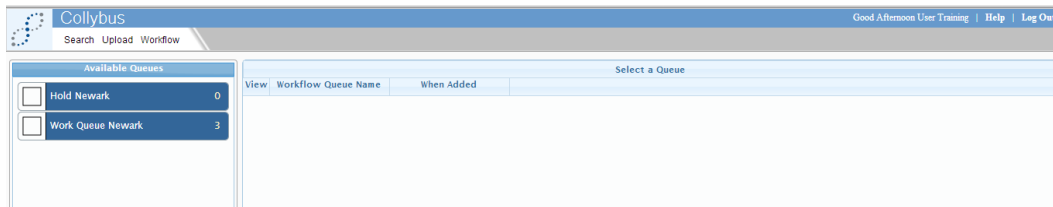
The system will prompt the user to create a new password.

3. Work Queues

3.1. Main Exception Portal Screen

After logging in, the user is presented with their default Workflow screen.

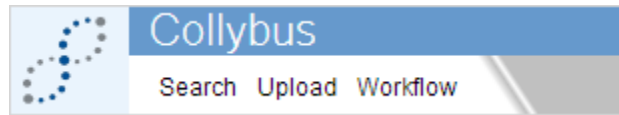
Figure 2: Default Workflow Window



Users: Will be presented with 'WORK Queue 'RO' and HOLD 'RO' Queue

3.2. Options at the Top of the Screen

The options available at the top of the screen will vary by user permissions.



Search: The search feature allows the user to filter on document index values for document retrieval. *This feature is currently not available.*

Upload: The upload feature allows the user to upload a new document directly into the workflow. *This feature is currently not available.*

Workflow: The workflow feature allows the user to select pre-defined work queues for document processing and routing.

User Management: The user management feature allows administration level users to add or disable users & assign them to work groups.

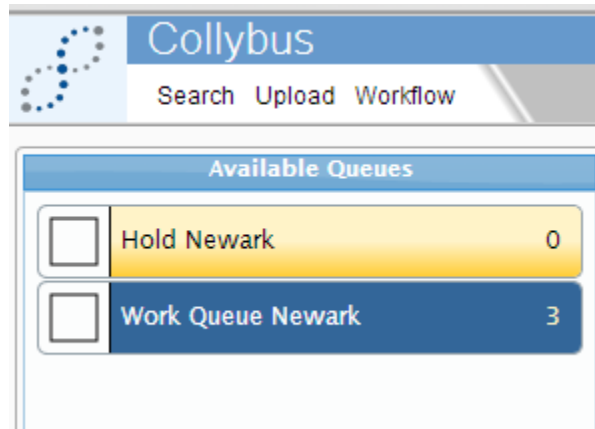
3.3. Workflow Process Queues

Users will be assigned to groups which will correlate to pre-defined work queue assignment. The user may select which work queue he / she wants to begin work processing.

- Work Queue 'RO'; contains new documents pending processing assigned to each specific user by the Super User(s) within a given Regional Office (RO).
- Hold 'RO'; contains documents the user placed on hold; such as documents that require additional information to be supplied to the Department of Veteran Affairs (VA) to continue processing.

Below depicts a sample of 'NEWARK RO'

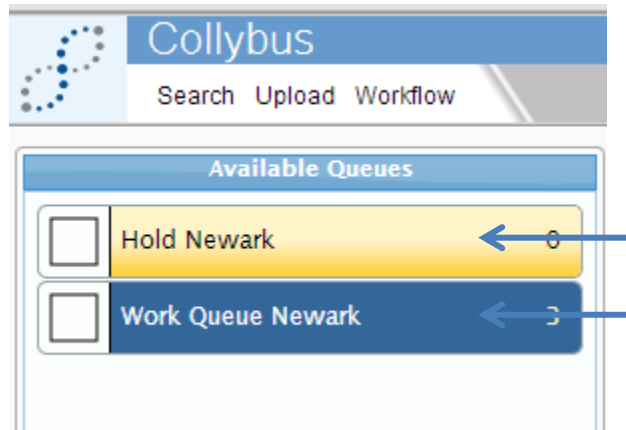
Figure 3: Work Queue Newark



Users: Assigned to RO groups within the domain will include:

- Work Queue 'RO'
- Hold 'RO'

Each work queue will have the total number of documents available for processing listed to the far right for work queue management.

Figure 4: Number of Documents

3.4. Select Work Queue

The user can select the desired work queue by placing a checkmark (single left click) in the checkmark box to the left of the work queue name or hover over the work queue name and click.

Work Queue Selection Type 1: If the user chooses to 'checkmark' select; the system will return a listing of all available documents currently waiting processing in a results grid.

The results grid will include:

- View Document Indicator
- Workflow queue name
- Date / Time the document was added to the queue
- SMS Package Tracking #
- SSN #
- Veteran File ID (Index Value)
- Veteran First Name (Index Value)
- Veteran Last Name (Index Value)
- Received Date (Index Value)
- Hold Initiator (Only applies to Hold Queue)
- Reason (Only applies to Hold Queue)

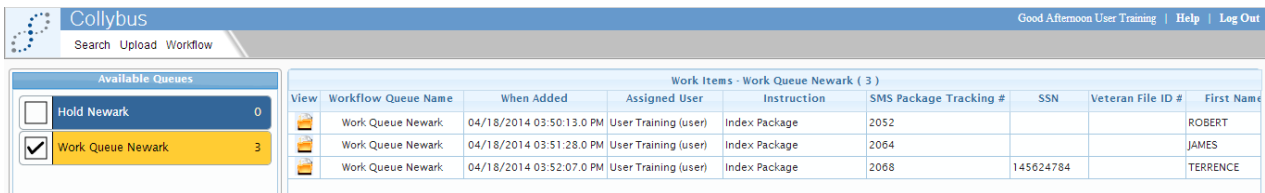
Figure 5: Work Queue Sample

Work Items - Work Queue Newark (10)								
View	Workflow Queue Name	When Added	SMS Package Tracking #	SSN	Veteran File ID #	First Name	Last Name	Received Date




Figure 6: Hold Queue Sample

Work Items - Hold Newark (1)										
View	Workflow Queue Name	When Added	Hold Initiator	Reason	SMS Package	Veteran File ID #	First Name	Last Name	Zip	Received Date
	Hold Newark	04/15/2014 10:31:26.0 AM	Basic Boser (user)	Pending Call	1133	134567	JOSEPH	MILICH	08807	

Figure 7: Work Queue Newark

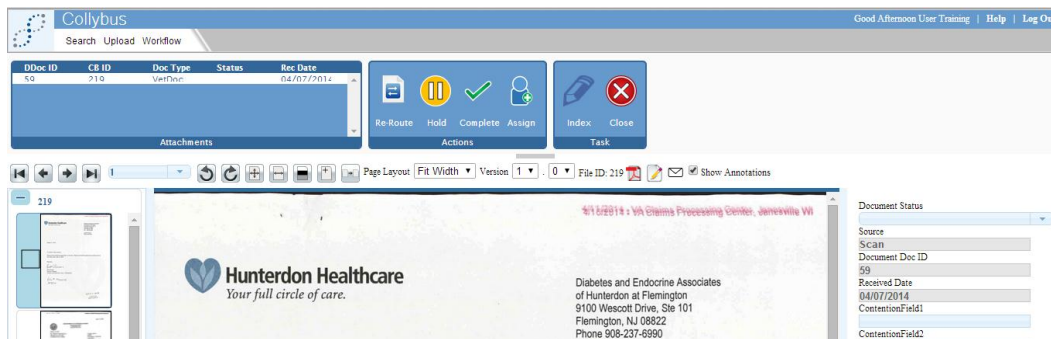


The screenshot shows the Collybus interface with a sidebar for 'Available Queues' containing 'Hold Newark' (0) and 'Work Queue Newark' (3). The main area displays a table of work items:

Work Items - Work Queue Newark (3)									
View	Workflow Queue Name	When Added	Assigned User	Instruction	SMS Package Tracking #	SSN	Veteran File ID #	First Name	Last Name
	Work Queue Newark	04/18/2014 03:50:13.0 PM	User Training (user)	Index Package	2052			ROBERT	
	Work Queue Newark	04/18/2014 03:51:28.0 PM	User Training (user)	Index Package	2064			JAMES	
	Work Queue Newark	04/18/2014 03:52:07.0 PM	User Training (user)	Index Package	2068	145624784		TERRENCE	

Work Queue Selection Type 2: If the user chooses to ‘hover’ and select; the application will automatically launch the first available document for processing in the processing window.

Figure 8: Processing Window



The screenshot shows the processing window for document 219. It includes a table with document details:

DDoc ID	CB ID	Doc Type	Status	Rec Date
219	>10	VetDoc		04/07/2014

Below the table are 'Attachments' and 'Actions' (Re-Route, Hold, Complete, Assign). A 'Task' panel shows 'Index' and 'Close' buttons. The main document view displays the 'Hunterdon Healthcare' logo and contact information for 'Diabetes and Endocrine Associates of Hunterdon at Flemington'.

4. Processing

4.1. Work Queue: Package Level Processing

The grid at the top left provides the user a view of the mail package level. The mail package level contains:

- DDoc ID (VBMS Document ID Code)
- CB ID (Unique control number assigned to each document by scanning vendor)
- Doc Type (Always Vet Doc)
- Status (Document level status that is assigned based on action taken by users)

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- Received Date

To select the document:

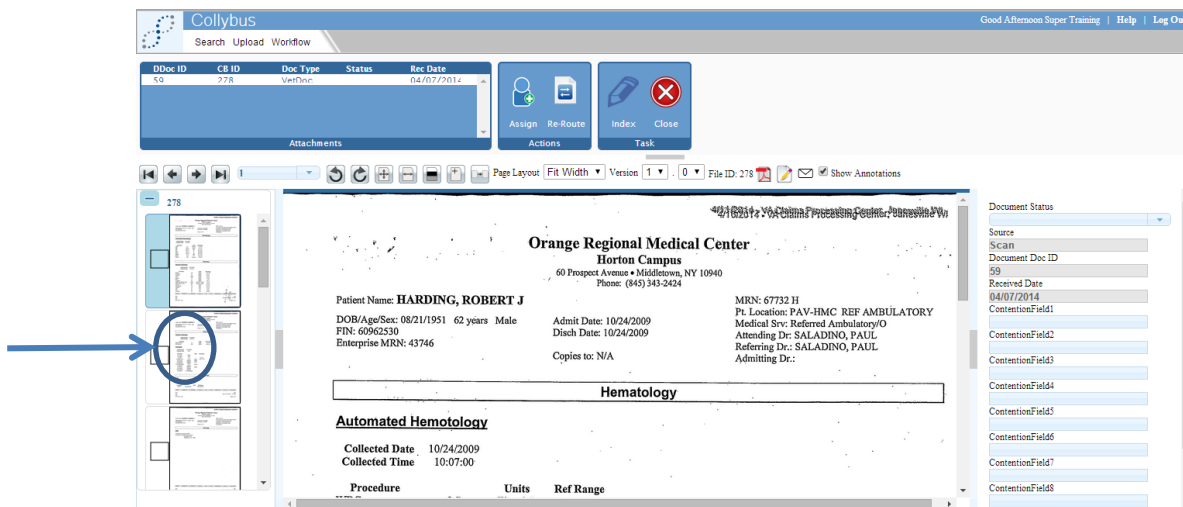
1. Hover over the desired row within the grid
2. Left click once

After selecting the document; the application will display the first page of the document in the main image view window and all the document pages along the left as thumbnails.

The user can choose to hide the thumbnail view:

1. Left click the 'grey' shaded panel bar

Figure 9: Hide Thumbnail View

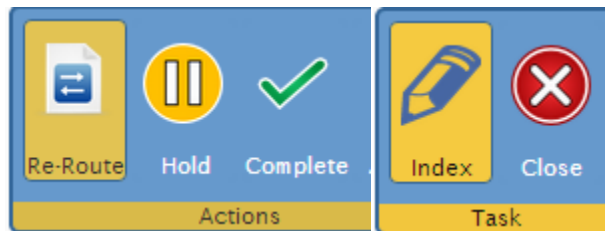


The user has the ability to:

- **Re-Route** a package
 - This will move the entire package to a Super User to authorize and finalize re-assignment to appropriate 'RO' designation
- Place a package on **Hold**
 - This will move the entire package into the 'RO' designated Hold work queue to process at a later time/date
- Mark a package **Complete**
 - This will move the entire package into a back-end work processing stage 'Ready for Upload' and will execute file transfer to VBMS.
- **Index** a package
 - This allows the user to update the following index values associated to the package; these fields are **MUST BE PRESENT** to complete Upload to VBMS:

- Veteran First Name
- Veteran Last Name
- Veteran File ID Number
- **Close a package**
 - This allows the user to close out of the current mail package and return to the results grid under the main search screen

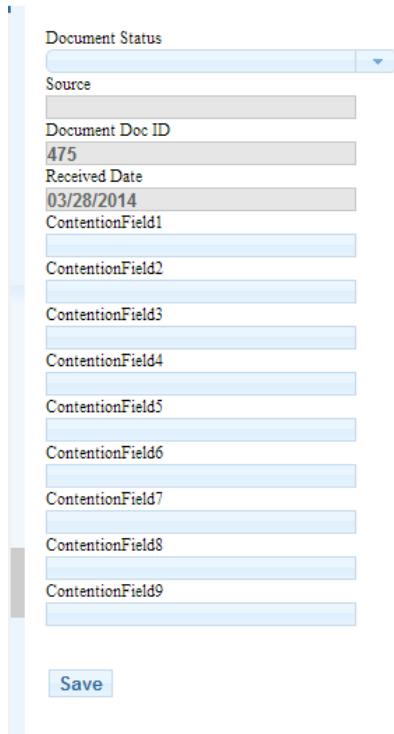
Figure 10: Re-Route/Hold/Complete/Index/Close



4.2. Work Queue: Document Level Processing

The user can select any of the documents within the mail package to view & modify index values associated; some index values are restricted and cannot be edited by the user. Non-editable fields are highlighted in grey. The fields that are editable by a user include:

Figure 11: View and modify Documents



Document Status

Source

Document Doc ID
475

Received Date
03/28/2014

ContentionField1

ContentionField2

ContentionField3

ContentionField4

ContentionField5

ContentionField6

ContentionField7

ContentionField8

ContentionField9

Save

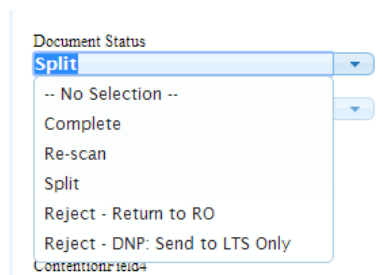
- Document Status
 - The user can modify the document status to one of the following:
 - Complete
 - User should select this if the document is OK to send to VBMS
 - Re-scan
 - User should select this if the document image contains a double feed (2 documents scanned one atop another) or if the image is obscured (folded corner).

NOTE: All rescan requests will be routed first to a Super User for approval and to a COR user for authorization and approval.
 - Split
 - User should select this if the document contains more than one document type (Doc ID) or mixed veteran information that should be processed individually.

NOTE: All split requests will be routed to a Super User for authorization and approval.
 - Reject – Return to RO

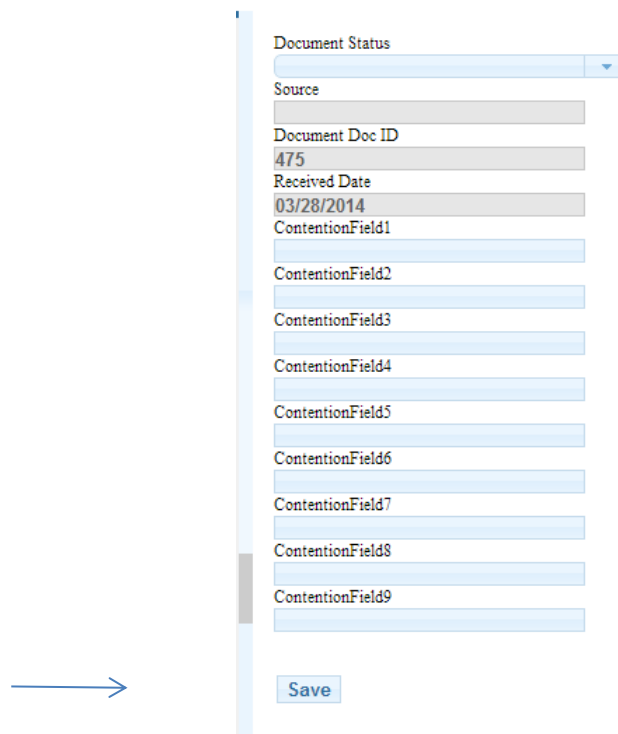
- User should select this if the document (physical source) should be pulled and returned to VA RO. Document Image and Index values will NOT be uploaded to VBMS when this feature is selected.
- Reject – Do Not Process (DNP); Send to long-term storage (LTS) Only
 - User should select this if the document (physical source) should NOT be uploaded to VBMS but the source should be sent to LTS.

Figure 12: Split



After the document status has been properly updated; user should click 'SAVE' and select the next document from the mail package grid at the top left of the window

Figure 13: Save

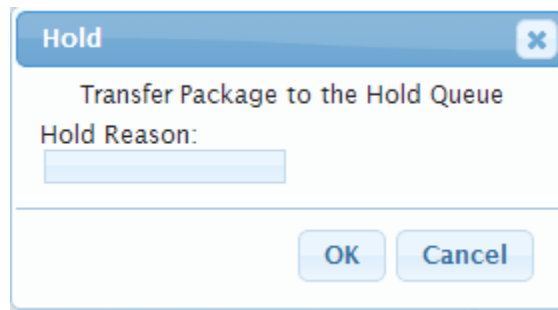


NOTE: It is not necessary to update the status on each document prior to marking the package level complete; but it is recommended that each document / images be reviewed prior to

marking the mail package complete. If no action is needed on a document; status can be left blank.

The user can mark a mail package on 'Hold'

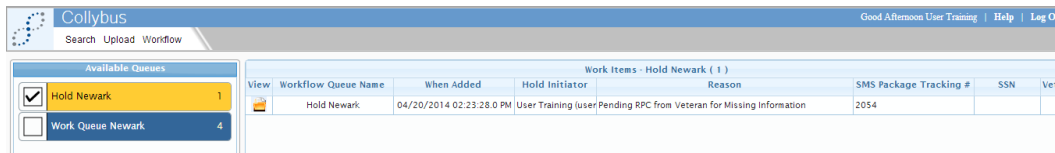
Figure 14: Hold



The user is able to enter a hold reason and click 'OK' to move the mail package from the work processing queue into a 'Hold' queue until such time the mail package can be completed.

The package will move from the 'RO Work Queue' to the 'Hold' queue.

Figure 15: Hold Newark



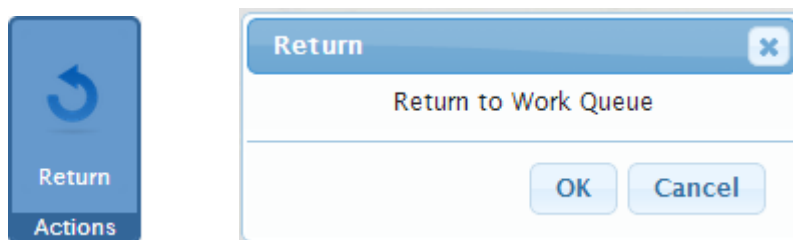
The system will also display the user name that placed the document on hold and the reason within the results grid.

Figure 16: User Name

Work Items - Hold Newark (1)		
Hold Initiator	Reason	
1 User Training (user)	Pending RPC from Veteran for Missing Information	2

The user has the ability to 'Return' mail package to 'RO Work Queue' for processing

Figure 17: Return



The application will move the mail package back into the user work processing queue

Figure 18: User Work Processing Queue



4.3. Notes


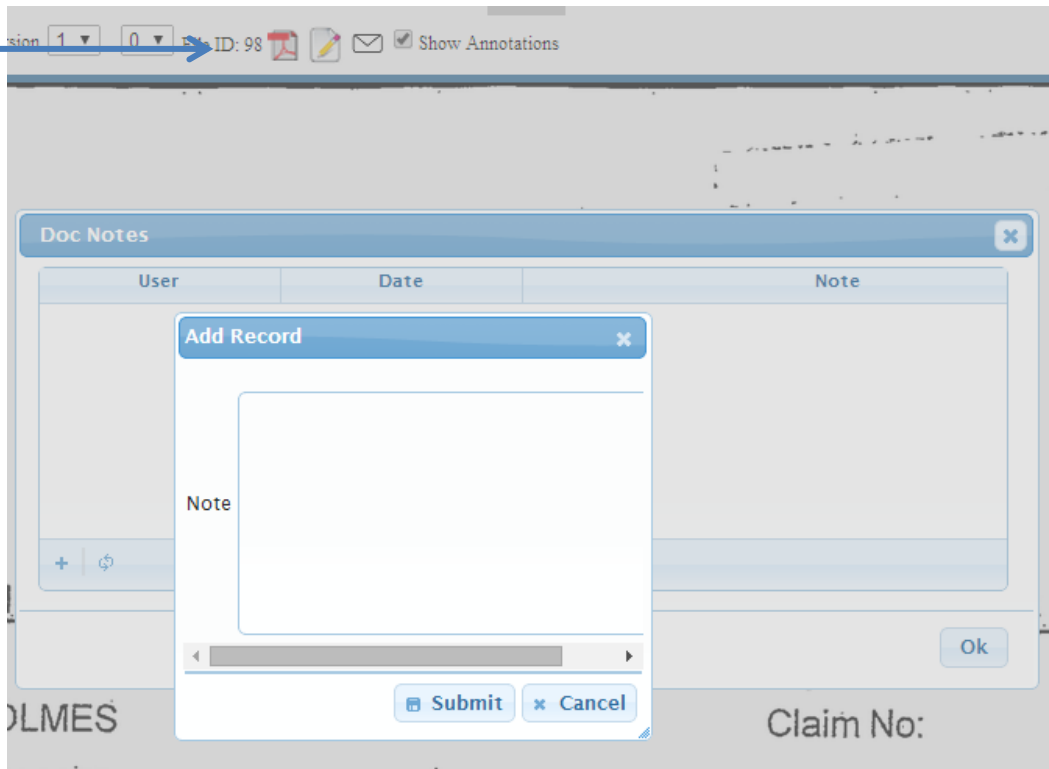
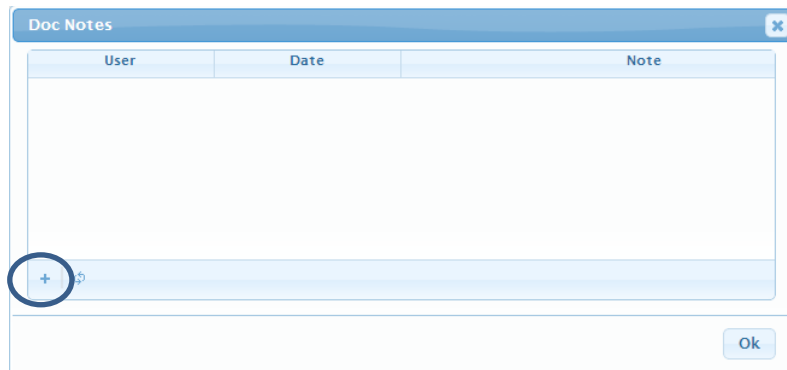
Notes can be added to any document and be available for view by anyone with permission to view the document. Access the notes screen by clicking the 'Notes' icon  .

Figure 19: Notes Icon



Previous notes can be viewed in the pop-up screen. New notes can be added by selecting “+”.

Figure 20: Doc Notes Window

When notes have been added to a document, the notes icon will be highlighted yellow. Click on the yellow note icon to view notes.

Figure 21: Notes Icon

5. View Buttons and Tools

5.1. Image Navigation



Click the “Arrow” buttons to navigate between documents.

Use the page number selector to jump to a specific page.

5.2. Rotating Images



Click the “Rotate” buttons to turn pages within the document.

Rotating an image only affects the view of the document as displayed to the current user and does not change the underlying file (i.e. saves rotation).

5.3. Zoom




Click the “Fit All” button to see entire document.




Click the “Fit Width” button to expand width to entire width of view.

Page Layout Use the page layout drop down menu to choose view percentage.


5.4. Brightness and Contrast

 Click the “Adjust Brightness and Contrast” button to adjust the brightness and contrast.


5.5. Append Pages (not currently activated)

 Click the “Append Pages” button to insert a document.

5.6. Replace Content (not currently activated)

 Click the “Replace Content” button to replace a document with a new document.

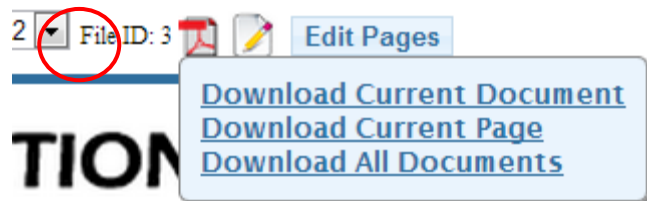
5.7. Version Number and Toggle (not currently activated)

Versions  Use the Versions drop down menu to select, view and/or download a previous version of the document. This applies when the original image file is modified via ‘edit’, ‘append’ or ‘replace’ functions.

5.8. Save or Print a Document

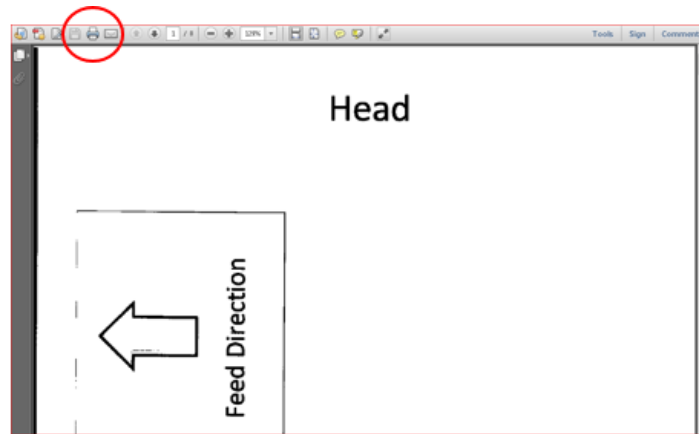
Once a document is presented, you may find the need to print a hard copy. To print, select the first “Adobe PDF” icon. Choose from the following download options:

Figure 22: Edit Pages



- **Download Current Document:** Brings up all pages to view in Adobe Acrobat Reader.
- **Download Current Page:** Brings only the image currently in the image viewer to view in Adobe Acrobat Reader.
- **Download All Documents:** Is used when viewing several documents (i.e., Portfolio).

From Adobe Acrobat, select “Print” to choose the print options required.

Figure 23: Print Page

5.9. Hot Keys

The Hot Keys may be used in the View mode for quicker document manipulation.

- 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

5.10. Error Messages

A required field has not been entered. “Enter valid text for “Field Name”. Required fields are highlighted in yellow when data is not present as a visual indicator to the user that is must complete before action can be taken.

Figure 24: Index Package

Index Package
✕

SMS Package Tracking #

Veteran File ID #

- Enter valid text for: Veteran File ID #

First Name

Middle Initial

Last Name

Date Of Birth
 Now

Street Address

City

State

Zip

SSN

Error Return Reason

Attempts

Save

6. Acronyms

Table 1: Acronyms

Acronym	Definition
DNP	Do Not Process
LTS	Long-Term Storage
RO	Regional Office
VA	Department of Veteran Affairs