Education Service

**Digitized Mail Handling Services (DMHS)  
Centralized Mail (CM) Portal Basic User Training Presentation**

Lesson Plan

September 2019

Version 1.0

Lesson Overview

| Topic | Description |
| --- | --- |
| Time Estimate: | 1 hour |
| Purpose of the Lesson: | The purpose of this presentation is to provide high level steps for Basic Users to handle Returned Mail packets in the Centralized Mail (CM) Portal. |
| Prerequisite Training Requirements: | None |
| Target Audience: | This lesson is designed for the following audiences:   * Claims Specialists |
| Lesson References: | * Centralized Mail-Portal User Manual Version 1.3 |
| Lesson Objectives: | After you have completed the Centralized Mail Basic User Training Presentation lesson, you will be able to:   * Open up the Centralized Mail Portal * Locate a packet * Download the packet to your computer * Add the packet the TIMS * And close out the packet |
| What You Need: | Digitized Mail Handling Services (DMHS) Centralized Mail (CM) Portal Basic User Training Presentation |
| Post Training Requirements: | Upon completion of the classroom portion of the lesson, participants are required to complete an online lesson assessment and survey in Talent Management System (TMS).  To demonstrate successful completion of the lesson participants must pass the assessment with a score of at least 80%.  Participants must also complete the online survey to earn credit for completion of the lesson. |

Instructor Notes

This lesson provides students with the steps for logging in to the CM Portal, locating a packet, downloading it to the hard drive so that it can be uploaded to TIMS and finish the packet after uploaded.

| PowerPoint Slides | Instructor Activities |
| --- | --- |
|  | **DISPLAY** slide **1. “Digitized Mail Handling Services (DMHS) Centralized Mail (CM) Portal Basic User Training”**  **INTRODUCE** yourself as the instructor and fellow instructors (if any).  **INTRODUCE** the lesson. |
|  | **DISPLAY** slide **2. “Overview”**  **EXPLAIN that you will be discussing how Basic Users will handle returned mail in the Centralized Mail portal.** |
|  | **DISPLAY** slide **3. “Lesson Objectives”**  **EXPLAIN to the students that they will be learning how to locate a packet in the Centralized Mail Portal, download it to their computer and then add that document to TIMS, and then close out of the packet.**  **ADVISE them that they will need to close out of the packet correctly so that it is not erroneously uploaded to VBMS.**  **ENCOURAGE students to ask questions throughout the presentation.** |
|  | **DISPLAY** slide **4. ”Basic User Mail Handling Process”**  **LIST the steps that are involved in the Mail Handling Process for Basic Users.**  **EXPLAIN you will discussing each step during this presentation.** |
|  | **DISPLAY** slide **5 “Logging in to the CM Portal”**  **ACCESS** [<https://dmhs.digitalcontentservices.com/>](https://dmhs.digitalcontentservices.com/)  **SHOW the link to the CM Portal**  **EXPLAIN that you will be demonstrating how to log in to the portal.** |
|  | **DISPLAY slide 6 “Logging in to the CM Portal”**  **CONTINUE** showing the students how to log in |
|  | **DISPLAY** slide 7 **“Logging in to the CM Portal”**  **REMIND** the students that they will need to use the Authentication Certificate to continue the log in process.  **INFORM** them this is where the user will select the correct certificate click enter. |
| **WSMS Menu** | **DISPLAY** slide **8** “Logging In to the CM Portal”  **INFORM** the the user that they will need to input their PIV PIN number here. |
|  | **DISPLAY** slide **9** “Centralized Mail Main Page”  **EXPLAIN** that this is the first page the comes up after opending up the Portal. The user will be looking in the Education Queue  **EXPLAIN** that that the user will click on the plus sign to access their RPOs Queue. |
|  | **DISPLAY** slide **10** “Accessing the Work Queue”  **EXPLAIN** that this screen shows The user the RPO Queue  **EXPLAIN** that after going to their RPOs queue, the user will click on the plus sign by their RPO to access their individual queue. |
|  | **DISPLAY** slide **11** “Accessing the Work Queue”  **EXPLAIN** that Basic Users will only have access to 2 queues. The Hold Queue and Work Queue. |
|  | **DISPLAY** slide **12** “Accessing the Work Queue”  **DEFINE** The Work Queue  **DEFINE** The Hold Queue |
|  | **DISPLAY** slide **13** “Accessing the Work Queue”  **EXPLAIN** that by clicking on the Work Queue, the user will see all of the packets that are in the work queue ready to be reviewed.  **EXPLAIN** that the user will need to double click on the packet located in the Selected Queue view to open up a packet. |
|  | **DISPLAY** slide **14** “Basic User Mail Handling Process”  **LIST** the available actions that the Basic User will have when they open a packet for review.  **ADVISE** the class that you will be discussing each option during this presentation. Contract Status and Worksite. |
|  | **DISPLAY** slide **15** “Basic User Mail Handling Process”  **REMIND** the user that they must double click on the highlighted packet to open in and see the documents contained in that packet.  **EXPLAIN** to the class that they only have access to the blue buttons. |
|  | **DISPLAY** slide **16** “Basic User Mail Handling Process.”  **EXPLAIN** that this is what a packet looks like in the Mail Portal when it is opened  **LIST** the three different windows that are open in the Packet Detail view.  **EXPLAIN** that the Document List view lists each document located in the packet.  **EXPLAIN** that each tab in the Document View window will display each document.  **EXPLAIN** the Packet Indexing window contains the below information and can be edited:   * Veteran File Number * First Name * Middle Initial * Last Name * Zip Code |
|  | **DISPLAY** slide **17** “Basic User Mail Handling Process”  **EXPLAIN** that you will be discussing each possible action that can be taken when working an open packet.  **EXPLAIN** the first button you will discuss is the Hold button.  **EXPLAIN** that this button is used when you have a question about the packet that you need answered before you can upload it to TIMS.  **EXPLAIN** that the packet will remain assigned to you and remain in the Hold queue until you either reroute it back to your Work queue or you upload the document to TIMS. |
|  | **DISPLAY** slide **18** “Basic User Mail Handling Process”  **EXPLAIN** that after the user clicks on the Hold button, a window will open up asking the user why they are forwarding the packet to the Hold queue.  **EXPLAIN** that the user will need to give a reason for the Hold. They will not be able to proceed until they do.  **EXPLAIN** that once they give a reason, they will then need to click the OK button and the packet will then be sent to the Hold queue. |
|  | **DISPLAY** slide **19** “Basic User Mail Handling Process”  **OPEN** the Centralized Mail and Highlight the Hold Queue  **EXPLAIN** that the packet is now in the Hold queue awaiting further action.  **EXPLAIN** that once the user gets their answer, they can either forward it to the Work queue or they can open it in the Hold queue and work it. |
|  | **DISPLAY** slide **20** “Basic User Handling Process”  **EXPLAIN** that the user can disregard this button. It only applies to the Service Center. |
|  | **DISPLAY** slide **21** “Basic User Mail Handling Process”  **EXPLAIN** that you will now be discussing the Reassign button.  **EXPLAIN** that this option is used when after reviewing the packet, it is determined that it was sent to the wrong location.  **EXPLAIN** that the user is able to route the packet to this queue so that it can be forwarded to the correct location.  **MENTION** that after the packet is routed to the Reassign queue, only the Super User or Supervisor will have the ability to route the packet to the correct location. |
|  | **DISPLAY** slide **22** “Basic User Mail Handling Process”  **EXPLAIN** that after the user clicks on the Reassign button, a window will open up asking the user if they wish to send the selected packet to the Reassignment queue.  **EXPLAIN** that the user will then need to click the OK button to send to the packet to the Reassignment queue. |
|  | **DISPLAY** slide **23** “Basic User Mail Handling Process”  **EXPLAIN** that you will now be discussing the Split function.  **EXPLAIN** that the Split function is used when there are two different claimants in the same packet and it needs to go to the vendor so that they can be separated into two packets. |
|  | **DISPLAY** slide 24 “Basic User Mail Handling Process”  **EXPLAIN** that after the user clicks on the Split button, a window will open up asking the user why they are forwarding the packet to the Split queue.  **EXPLAIN** that the user will need to give an explanation why they are forwarding it for Splitting. They will not be able to proceed until they do.  **EXPLAIN** that once they give a reason, they will then need to click the OK button and the packet will then be forwarded to the Authorization queue.  **EXPLAIN** that once in the Authorization queue, the Super User will need to authorize it before it goes to the Vendor. |
|  | **DISPLAY** slide **25** “Basic User Mail Handling Process”  **EXPLAIN** that you will now be discussing the Unidentifiable button.  **EXPLAIN** that the Unidentifiable button is used when after a thorough review of the packet, the user is unable to identify the claimant’s information.  **EXPLAIN** that if there is an indication on the packet that it is the best copy, that the user should not send it to the Vendor. They should place it on Hold and ask their supervisor what to do.  **EXPLAIN** that you need to identify the claimant so that you can upload the documents in the packet to the correct TIMS file. |
|  | **DISPLAY** slide **26** “Basic User Mail Handling Process”  **EXPLAIN** that after the user clicks on the Unidentifiable button, a window will open up asking the user if they wish to send the selected packet to the Vendor for review.  **EXPLAIN** that once the user clicks the OK button, the packet will be sent to the Vendor for review and possible action. |
|  | **DISPLAY** slide **27** “Basic User Mail Handling Process”  **EXPLAIN** that before adding the documents in a packet to TIMS, the user should first download the packet to their computer.  **EXPLAIN** that the user will need to click on the Download button and then select the open button on the window found at the bottom of the screen. |
|  | **DISPLAY** slide **28** “Basic User Mail Handling Process”  **ADVISE** the class that when this window opens, the user will need to select Allow so that the packet downloads to their computer. |
|  | **DISPLAY** slide **29** “Basic User Mail Handling Process”  **EXPLAIN** that once this is what the PDF files should look like once downloaded to your computer.  **EXPLAIN** that once the PDFs are added to the user’s computer, they will need to follow the steps for uploading documents to TIMS. |
|  | **DISPLAY** slide **30** “Basic User Mail Handling Process”  **EXPLAIN** That once you have captured the documents to TIMS, the user will need to finish the packet in the Portal so that it does not get uploaded to VBMS. |
|  | **DISPLAY** slide **31** “Basic User Mail Handling Process”  **EXPLAIN** that you will now be discussing the next action to take after the documents are uploaded to TIMS.  **EXPLAIN** that you will now be talking about how to finish a packet by using the Do Not Upload button.  **EXPLAIN** that before using the Do Not Upload button, the user needs to verify that all of the documents in the packet were uploaded to TIMS. It will be finished and not accidently uploaded to VBMS. |
|  | **DISPLAY** slide **32** “Basic User Mail Handling Process”  **EXPLAIN** that after the user clicks on the Do Not Upload button, a window will open up asking the user if they downloaded the packet to the correct business line and that they acknowledge the package will not be uploaded to VBMS.  **EXPLAIN** that after the user clicks Ok, the packet will be finished and the packet will leave the user’s Work queue. |
|  | **DISPLAY** slide **33** “Basic User Mail Handling Process”  **EXPLAIN** that whenever the Close button is used, it only closes the user out of the packet. The packet will remain in the user’s queue as read.  EXPLAIN that the only way to |
|  | **DISPLAY** slide **34** “Summary”  **REVIEW** the information discussed in today’s lesson. |
|  |  |
|  | **DISPLAY** slide **35** “Questions?”  **ASK** students if they have any questions about today’s CM Portal lesson.  **RESPOND** to all questions before tasking students to complete the assessment |
|  | **DISPLAY** slide **36** “TMS Assessment and Survey”  Conclude the training by doing the following:  **CONFIRM** thestudents know how to access the assessment and survey in TMS.  **EXPLAIN** that the assessment is TMS # and will cover what they learned in class today.  **REMIND** them that they must complete both the assessment and the survey in order to receive credit in TMS.  **TELL** students that the survey provides them an opportunity to improve the training and that their feedback is welcome. |