

**Department of Veterans Affairs
Paper Mail Conversion and Management Services (PMCMS)
Centralized Mail (CM) Portal**

User and Training Manual



Prepared by:



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Version History

The **Version History** lists the most recent Versions and Descriptions of associated changes for the CM Portal User and Training Manual. Refer to [Appendix B – Previous Version History](#) for prior CM Portal User and Training Manual Version information.

Date	Version	Description	Author
09/26/2021	1.22	<ul style="list-style-type: none"> Referenced custom User Roles and Permissions in Section 4 Revised Sections 8.2.1 and 8.2.4 to Add and Edit a User Modified Section 8.2.2 to Bulk Add Multiple Users Updated the Bulk Add Microsoft Excel File Template for Creating the CSV File in Section 8.2.2.1.1 	Team SMS/Leidos
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Table of Contents

- 1 Introduction 1
 - 1.1 Purpose 1
 - 1.2 CM Portal Access Requirements 1
 - 1.3 Technical Support Help Desk 1
 - 1.4 CM Portal Account Deactivation 2
 - 1.5 Low Vision Accessibility 2
 - 1.6 Information Security and Privacy 3
 - 1.7 CM Portal Terms of Use 4
- 2 Accessing the CM Portal 5
 - 2.1 Single Sign-On for VA Employees within the VA Network 5
 - 2.2 Initial User Registration and Identification 8
 - 2.3 System Notifications Prior to Access 9
 - 2.4 Frequently Asked Questions (FAQ) 11
- 3 Application Toolbar 12
 - 3.1 Centralized Mail 12
 - 3.2 Direct Upload 12
 - 3.3 Admin 12
 - 3.4 System Notifications 12
 - 3.5 Hello, User 14
- 4 User Roles, Permissions, and Queues 16
 - 4.1 Basic User Role 16
 - 4.2 Basic User + Automatic Assignment Role 17
 - 4.3 Super User Role 17
 - 4.4 Supervisor User Role 17
 - 4.5 Records Management Officer (RMO) User Role 17
 - 4.6 National Reviewer User Role 18
 - 4.7 Quality Assurance (QA) User Role 18
 - 4.8 Contracting Officer’s Representative (COR) User Role 18
 - 4.9 Queues 18
 - 4.9.1 Hold Queue – Duration and Alert Notification 20
 - 4.9.2 Work Queue – Automatic Packet Assignment 21
- 5 Display Controls 22
 - 5.1 Horizontal Display Controls 22
 - 5.2 Vertical Display Controls 23
 - 5.3 Page Navigation and Display Controls 24
- 6 Centralized Mail (CM) 25
 - 6.1 Queue Hierarchy 25

- 6.1.1 Queue Hierarchy Navigation and Packet Count 27
- 6.1.2 Special Processing for COR Users 27
- 6.2 CM Packet Results Grid 28
 - 6.2.1 Results Grid Display 28
 - 6.2.2 Results Grid Functionality 29
- 6.3 Search for a Packet 37
 - 6.3.1 Search Criteria 39
 - 6.3.2 Save a Search 40
 - 6.3.3 Select a Saved Search 41
 - 6.3.4 Delete a Saved Search 41
 - 6.3.5 Export Option 42
- 6.4 CM Packet Status Values 43
- 7 CM Packet Detail Screen 44**
 - 7.1 Open a Packet on the Packet Detail Screen 44
 - 7.2 Packet Detail Menu 45
 - 7.2.1 Document List 46
 - 7.2.2 Packet Indexing 47
 - 7.2.3 Document Indexing 48
 - 7.2.4 Document Viewer 49
 - 7.3 Packet Actions Task Bar 52
 - 7.3.1 Approve Button 52
 - 7.3.2 Deny Button 54
 - 7.3.3 Return Button 55
 - 7.3.4 Hold Button 56
 - 7.3.5 Upload to VBMS Button 56
 - 7.3.6 Assign Button 57
 - 7.3.7 Reassign Button 57
 - 7.3.8 Rescan Button 59
 - 7.3.9 Split Button 60
 - 7.3.10 Unidentifiable Button 61
 - 7.3.11 Do Not Upload Button 62
 - 7.3.12 Append Button 63
 - 7.3.13 Retrigger Button 65
 - 7.3.14 Download Button 66
 - 7.3.15 History Button 66
 - 7.3.16 Notes Button 68
 - 7.3.17 Close Button 68
 - 7.3.18 Mark Unread Button 69
 - 7.4 Automatic Workflow Mode 69
 - 7.4.1 Automatic Workflow Mode Only 69
 - 7.5 Manual Internal Split 69
- 8 Admin Application 73**
 - 8.1 Roles 73
 - 8.1.1 Add a User Role 74
 - 8.1.2 Edit a User Role 76

8.1.3 Delete a User Role..... 78

8.2 Users 78

8.2.1 Add a User 79

8.2.2 Bulk Add Multiple Users 82

8.2.3 Search for a User 87

8.2.4 View and Edit a User..... 87

8.3 Locations 89

8.3.1 Add a Location 89

8.3.2 Edit a Location 92

8.3.3 Delete a Location 93

8.4 Trigger Documents 93

8.4.1 Add a Trigger Document 94

8.4.2 Edit a Trigger Document 95

8.4.3 Delete a Trigger Document..... 96

8.5 Emergent Categories..... 97

8.5.1 Add an Emergent Category 97

8.5.2 Edit an Emergent Category..... 98

8.5.3 Delete an Emergent Category 99

8.6 DU Organizations 100

8.6.1 Add a DU Organization 101

8.6.2 Edit a DU Organization 102

8.6.3 Delete a DU Organization 103

9 Watermarks 104

Appendix A – Acronyms..... 105

Appendix B – Previous Version History..... 109

List of Tables

Table 1: Queue Assignments Based on User Role 19

Table 2: Packet Status Value Descriptions 43

Table 3: CSV File Column Value Order and Criteria 82

List of Figures

Figure 1: Web Browser Menu Icon Examples to Locate the Zoom Function..... 2

Figure 2: Start–Settings–System–Display to View Resolution and Scale and Layout... 3

Figure 3: Centralized Mail Portal Home Page 5

Figure 4: VA Single Sign-On Window.....5

Figure 5: Select a Certificate Window6

Figure 6: ActivID ActivClient Login Window6

Figure 7: Link SSOi Window6

Figure 8: DMHS Support Link SSOi Email7

Figure 9: Confirm Linking the Account Window.....7

Figure 10: Successful Verification Confirmation Window7

Figure 11: Link SSOi Window – Continue to Application.....7

Figure 12: User Identification Screen8

Figure 13: VA User Registration Window8

Figure 14: Continue Message Window.....9

Figure 15: CM Portal Home Page System Notifications9

Figure 16: System Notifications Window9

Figure 17: System Notification Categories10

Figure 18: Entire CM Portal Application Toolbar12

Figure 19: Ringing Bell Icon with Four System Notifications12

Figure 20: System Notifications Window with All Four Notification Categories13

Figure 21: Delete System Notifications Using the X Icon14

Figure 22: New System Notification Message Window14

Figure 23: User Account Options Menu14

Figure 24: About CM Portal Window15

Figure 25: Left Arrow Standard Main Screen View22

Figure 26: Left Arrow Changes to Right Arrow in Expanded Screen View23

Figure 27: Vertical Display Controls – Blue Icons23

Figure 28: Various Vertical Display Controls24

Figure 29: Page Display Controls.....24

Figure 30: CM Portal Application Toolbar – Centralized Mail25

Figure 31: Centralized Mail Home Page.....25

Figure 32: Standard Queue Hierarchy Example.....26

Figure 33: Specialized Queue Hierarchy Examples26

Figure 34: Queue Hierarchy Navigation and Packet Count.....27

Figure 35: COR Line of Business on Level 1 in the Queue Hierarchy.....27

Figure 36: CM Packet Results Grid Display28

Figure 37: Results Grid Columns – Far Left Standard Main Screen View.....29

Figure 38: Results Grid Columns – Far Right Scroll Arrow Screen View29

Figure 39: Results Grid Functionality – Packet Selection and Column Resizing.....30

Figure 40: Column Reordering31

Figure 41: Upward and Downward Sorting Arrows31

Figure 42: Results Grid Sorting Example32

Figure 43: Results Grid Date Sorting Example – Multiple Columns32

Figure 44: Results Grid Filter Field.....33

Figure 45: Search Options Symbols.....33

Figure 46: Vendor Options Menu34

Figure 47: Delete Search Parameters Using the X Icon.....34

Figure 48: Date Options Menu35

Figure 49: Date Range with Calendar Selectors35

Figure 50: Calendar Selector35

Figure 51: Date Bar Navigation36

Figure 52: Selecting Rows37

Figure 53: Opened and Unopened Packet Phase Indicator37

Figure 54: Search Tab.....38

Figure 55: Search Criteria38

Figure 56: Search Options Symbols.....39

Figure 57: Search, Reset, and Save Search Buttons.....40

Figure 58: Save Search Window40

Figure 59: Save New Search Window.....41

Figure 60: Saved Searches Options Menu.....41

Figure 61: Export Button42

Figure 62: Export Search Results Window42

Figure 63: Input File Name Window42

Figure 64: Packet Detail Screen.....44

Figure 65: Packet Detail Queue and Location Information.....44

Figure 66: Editing Packet/Document Indexing Fields.....45

Figure 67: Data Changed Alert Window.....45

Figure 68: Save Changes for Packet/Document Indexing.....46

Figure 69: Save Failed Window46

Figure 70: Document List47

Figure 71: Document List Tabs47

Figure 72: Packet Indexing Fields47

Figure 73: Emergent Flashes Options Menu48

Figure 74: Document Indexing Fields.....48

Figure 75: Document Indexing Fields Continued49

Figure 76: Adobe Acrobat Reader Abbreviated Toolbar.....50

Figure 77: Adobe Acrobat Reader Toolbars and Menu50

Figure 78: Arrow and Hand Icons.....50

Figure 79: 3-Dots Icon to Undock the Page Controls51

Figure 80: Undock Page Controls Mobile Toolbar.....51

Figure 81: Page Navigation Options.....51

Figure 82: Packet Actions Task Bar Example – Queues and Search Tabs.....52

Figure 83: Packet Actions Task Bar Example – Packet Detail Screen52

Figure 84: Approve Window52

Figure 85: Split Pending Approve Window53

Figure 86: Deny Window54

Figure 87: Return Window.....55

Figure 88: Hold Window56

Figure 89: Upload Window56

Figure 90: Assign Window.....57

Figure 91: Initial Reassign Window58

Figure 92: Final Reassign Window.....58

Figure 93: Packet Action Failure(s) Window58

Figure 94: Rescan Window59

Figure 95: Split Window60

Figure 96: Unidentifiable Mail Window62

Figure 97: Do Not Upload Window.....62

Figure 98: Append Documents Window64

Figure 99: Append Documents Submitted Files Uploading Box and Status.....64

Figure 100: Retrigger Window – One Packet65

Figure 101: Retrigger Window – Multiple Packets.....65

Figure 102: History Window – Packet History Tab66

Figure 103: Export History Window 66

Figure 104: Input File Name Window 67

Figure 105: History Window – Document History Tab 67

Figure 106: Packet Notes Window 68

Figure 107: Add Note Window 68

Figure 108: Save Changes Window 69

Figure 109: Manual Internal Split Window 70

Figure 110: Delete Packet from Manual Internal Split 71

Figure 111: Manual Internal Split Success Window 71

Figure 112: CM Portal Application Toolbar – Admin Option 73

Figure 113: Admin Drop-down Options Menu 73

Figure 114: User Roles Settings Window 73

Figure 115: Create New User Role Window 74

Figure 116: User Permissions Selection Reminder Window 74

Figure 117: User Roles Settings Permissions 74

Figure 118: User Permissions Save Confirmation Window 76

Figure 119: User Roles Settings Drop-down Options Menu 76

Figure 120: Editing User Role Window 77

Figure 121: User Role Update Confirmation Window 78

Figure 122: User Role Delete Group Window 78

Figure 123: User Role Deleted Confirmation Window 78

Figure 124: Admin – Users Screen 79

Figure 125: Add User Window 80

Figure 126: Add User – Edit DU Organizations Window 80

Figure 127: Designate Location/User Role and Add User 81

Figure 128: Add User Save Successful Confirmation Window 81

Figure 129: Admin-Users Task Bar 82

Figure 130: CSV File Extension Type 82

Figure 131: CSV File Column Value Order 83

Figure 132: Multiple Roles and Locations Example in the Excel Template 85

Figure 133: Bulk Upload Window 85

Figure 134: Select CSV File to Upload 85

Figure 135: Bulk Upload Validation Results Grid 86

Figure 136: Info Confirmation Window86

Figure 137: User Search and Results Grid Sorting or Filtering87

Figure 138: View and Edit User Information88

Figure 139: Editing User Window89

Figure 140: Admin – Locations Screen90

Figure 141: Add a Location Screen – Location Name, Parent Location, and Queues 90

Figure 142: Parent and Child Locations with Processing Queues Example.....90

Figure 143: Add a Location Screen.....91

Figure 144: Save Edits Button.....93

Figure 145: Delete a Location93

Figure 146: Delete Location Error Message Example93

Figure 147: Admin – Trigger Documents Screen94

Figure 148: Add Trigger Document Window94

Figure 149: Add Trigger Document Save Successful Confirmation Window.....95

Figure 150: Select and Edit a Trigger Document95

Figure 151: Edit Trigger Document Window.....95

Figure 152: Select and Delete a Trigger Document96

Figure 153: Delete Confirmation Window.....96

Figure 154: Admin – Emergent Categories Screen.....97

Figure 155: Add Emergent Category Window97

Figure 156: Add Emergent Category Save Successful Confirmation Window98

Figure 157: Select and Edit an Emergent Category98

Figure 158: Edit Emergent Category Window99

Figure 159: Select and Delete an Emergent Category99

Figure 160: Delete Confirmation Window.....100

Figure 161: Delete Not Allowed Window100

Figure 162: Admin – DU Organizations Screen100

Figure 163: Add Direct Upload Organization Window101

Figure 164: Add DU Organization Save Successful Confirmation Window101

Figure 165: Select and Edit a DU Organization.....102

Figure 166: Edit Direct Upload Organization Window102

Figure 167: Select and Delete a DU Organization103

Figure 168: Delete Confirmation Window.....103

Figure 169: Delete Not Allowed Window 103

Figure 170: Standard Watermark 104

Figure 171: Best Copy Watermark 104

Figure 172: Full Non-PMR Watermark 104

Figure 173: PMR Watermark..... 104

Figure 174: Full PMR Watermark..... 104

1 Introduction

The Department of Veterans Affairs (VA) Veterans Benefits Administration (VBA) continues to usher in new process and technology improvements focused on reducing the claims processing period for Veterans, their families, and survivors. During the past five (5) years, VBA transformational efforts to automate key processes and fully integrate end-to-end Centralized Mail (CM) intake, conversion, and handling have reduced inefficiencies, improved processing speed, and prevented backlog.

The CM Portal is a modernized, flexible platform that administers access to digital content uploaded from multiple sources. The CM Portal is the centralized, secure, single access resource where VBA employees retrieve CM Packets (converted paper and electronic documents) for manual and automated processing to manage workflow.

1.1 Purpose

The CM Portal User and Training Manual explains the procedure for accessing and utilizing the improved functionality of the CM Portal. Significant modifications enrich 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 claims processing now and into the future.

The Table of Contents, Lists of Tables and Figures, and [royal blue underlined text](#) provide hyperlink access to topics of interest addressed in the CM Portal User and Training Manual. Click on the desired selection to follow the link.

1.2 CM Portal Access Requirements

In order to access the 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.

Google Chrome, Microsoft Edge, and Mozilla Firefox web browsers provide the optimal CM Portal experience. **Google Chrome** is the preferred browser for connecting to the CM Portal. Other browsers than those mentioned are not fully supported and may cause connectivity or technical issues while using the CM Portal. Microsoft **Internet Explorer** is not a recommended or supported browser.

The web address for the [CM Portal](#) 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.

Report all emergency, system performance, availability, or non-UAM issues 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 Time (ET). All UAM email requests receive a response during normal duty hours.

Contact the [CM Portal Help Desk](#) (Digitized Mail Handling Services [DMHS] Support) at dmhs_support@leidos.com. Click on the aforementioned hyperlink to initiate a new email message addressed to the **CM Portal Help Desk** through your email service.

1.4 CM Portal Account Deactivation

If you do not access your CM Portal account for **90** consecutive days, your account deactivates in compliance with Federal and VA security policies and controls. Account access permission expires at the end of the **90th** day.

Thirty (**30**) days before the expiration date, Digitized Mail Handling Services (**DMHS**) **Support** sends the first **Deactivation Pending Notice** email to announce the upcoming account closure. Sign in to your CM Portal account by the expiration date to prevent deactivation.

Contact the **CM Portal Help Desk** to reactivate your account after the expiration date or change your email address. Sign in to your CM Portal account immediately after reactivation. Access permission terminates at the end of the same day if there is no account activity.

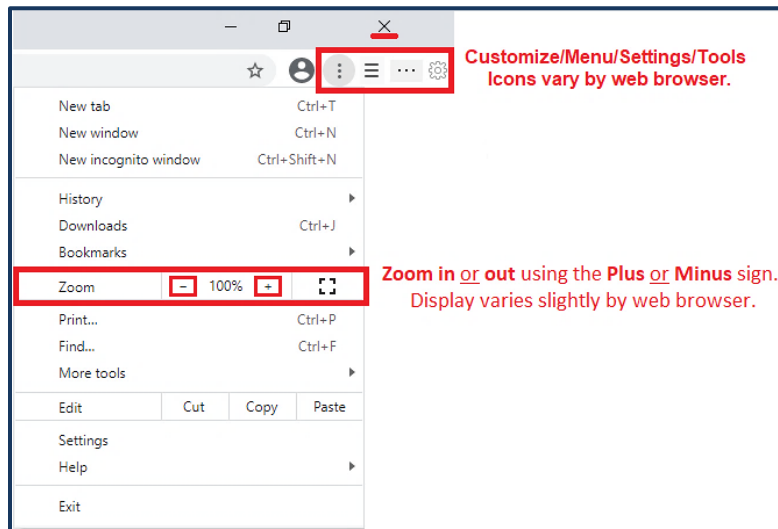
1.5 Low Vision Accessibility

The web page display may be resized up to **200%** for enhanced visibility using the customizable **Zoom** function from the web browser menu. The **Menu** icon is located in the upper right corner of the computer screen below the **X (Close)** icon.

Menu icon names (e.g., Customize, Menu, Settings, or Tools) and styles (e.g., three dots, three lines, or a gear) vary by web browser.

Click the web browser **Menu** icon to locate the **Zoom** function. Enlarge the page display size in fixed increments using the **Plus +** sign or reduce the page display size using the **Minus -** sign. Click anywhere on the screen outside of the web browser **Menu** to close it.

Figure 1: Web Browser Menu Icon Examples to Locate the Zoom Function



An optional **Zoom** method utilizes specific key combinations on the keyboard:

- Enlarge the page display size – press the **Ctrl** key and the **Plus +** key together
- Reduce the page display size – press the **Ctrl** key and the **Minus -** key together
- Reset **Zoom** to the default setting (**100%**) – press the **Ctrl** key and the **Zero (0)** key together



Increasing the **Zoom** setting for the web page display may overlap or conceal screen elements and text, especially on a laptop computer screen or when combined with the next (or other) enlargement method.

Another method to improve visibility is adjusting the screen **Display Resolution** and **Scale and Layout** settings for your computer.

Screen **Display Resolution** of **1920 x 1080** pixels with **Scale and Layout** set at **150%** optimizes viewing enlarged screen elements and text in CM Portal applications.

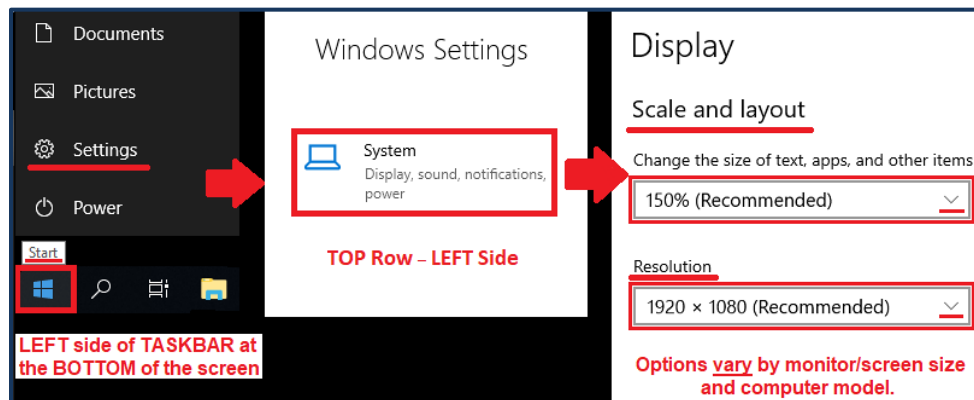
Use the **Zoom** default setting (**100%**) for the web page display if you adjust the screen **Display Resolution** and **Scale and Layout** settings for your computer. Increasing the **Zoom** setting for the web page display may overlap or conceal screen elements and text.

Display Resolution and **Scale and Layout** options vary by monitor or screen size and computer model. Your computer may not support these optimal settings.

Compare the **Display Resolution** and **Scale and Layout** options by clicking the **Start**  icon (**Windows Logo**) on the far left side of the **Taskbar** at the bottom of the computer screen (Microsoft Windows 10 Operating System). Select **Settings** (**Gear**  icon) from the **Start Menu** to navigate to the **Windows Settings** screen.

Click on **System** to view the screen **Display Resolution** and **Scale and Layout** settings. Fields with **Down Arrows** have an options menu.

Figure 2: Start–Settings–System–Display to View Resolution and Scale and Layout



Screen **Display Resolution (Recommended)** is the native resolution that provides the sharpest text and images possible for your computer. **Scale and Layout (Recommended)** adjusts text and image sizing appropriately for the monitor or screen size and **Resolution (Recommended)** setting.

If your computer does not support the optimal settings listed above, choose the enlargement method and setting(s) that provide the best results for your situation.

Explore Microsoft or Apple accessibility features and products at the following links for more information:

- [Microsoft Accessibility](https://www.microsoft.com/en-us/accessibility) at <https://www.microsoft.com/en-us/accessibility>
- [Apple Accessibility](https://www.apple.com/accessibility/) at <https://www.apple.com/accessibility/>

1.6 Information Security and Privacy

All Veteran information shown in any screen image throughout the manual is created for testing and not actual Veteran data, to protect Sensitive Personal Information (SPI) and Personally Identifiable Information (PII). Examples contain pseudonyms instead of real names. Actual Social Security Numbers (SSN), addresses, and other personal identifiers are not used.

1.7 CM Portal Terms of Use

The CM Portal website and its content are owned or controlled by Leidos, Inc. CM Portal website content is copyrighted and protected by United States (U.S.) and worldwide copyright laws and treaty provisions. In addition, CM Portal website content is protected by trademark laws, laws of privacy and publicity, and communications regulations and statutes. All rights not granted herein are reserved for Leidos. The U.S. Government and its contractors have obtained rights to use some of the content on the CM Portal website. "Content" refers to any materials, documents, images, graphics, logos, design, audio, video, and any other information provided from or on the CM Portal website.

Users are responsible for maintaining the confidentiality and security of their CM Portal website access credentials (e.g., username and password). Users are responsible for all activity that occurs under their access credentials and agree to immediately notify Leidos of any unauthorized use of their credentials.

The **Terms of Use** (Terms) govern use of the CM Portal website used or otherwise accessed by you that is made available by Leidos or its affiliated companies and subsidiaries. By using the CM Portal website, you accept and agree to these Terms. If you do not agree to these Terms, do not use the CM Portal website. Leidos reserves the right to modify these Terms by posting updated Terms. Your continued use of the CM Portal website following the posting of such modifications means that you accept and agree to the modified Terms. If you are dissatisfied with any modifications to these Terms, your exclusive remedy is to discontinue use of the CM Portal website.

The current version of the official **Terms of Use** is available at the bottom of every screen in the CM Portal. Click on the **Terms of Use** hyperlink to open the Terms in a new browser tab.

2 Accessing the CM Portal

Using a computer with a secure VA VPN connection, open the **Google Chrome** 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 3: Centralized Mail Portal Home Page

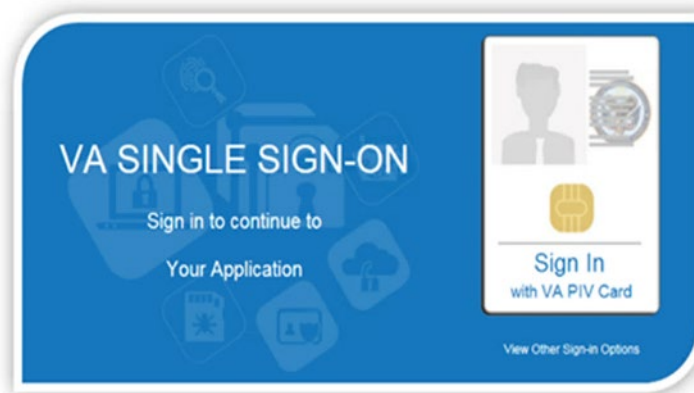


Members of groups **contracted** by the VA will select **Contractor Login**. The CM Portal User and Training Manual does not explain Contractor Login, since VA personnel do not utilize this feature.

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

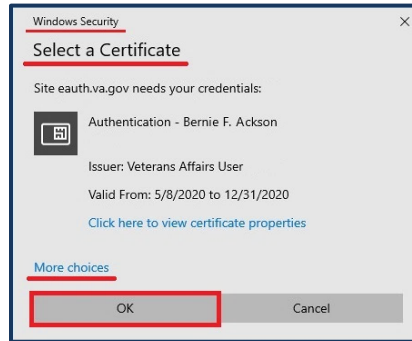
In the **VA Single Sign-On** window, click the **Sign In with VA PIV** (Personal Identity Verification) Card symbol.

Figure 4: VA Single Sign-On Window



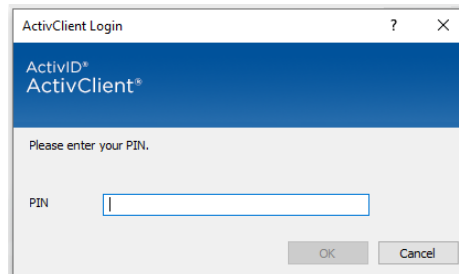
Select a **Certificate** in the **Windows Security** window, and click the **OK** button.

Figure 5: Select a Certificate Window



Enter your **Personal Identification Number (PIN)** in the **ActivID ActivClient Login** window, and click the **OK** button.

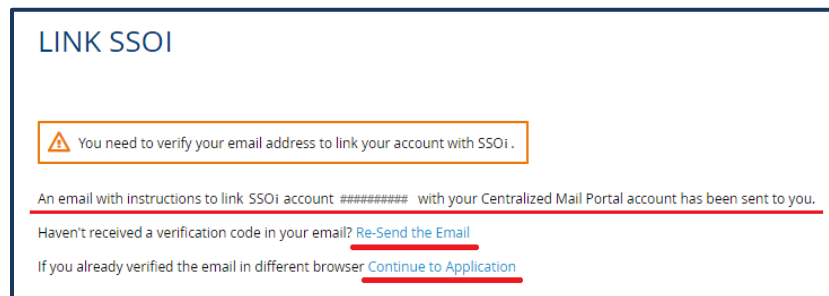
Figure 6: ActivID ActivClient Login Window



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 7: Link SSOi Window

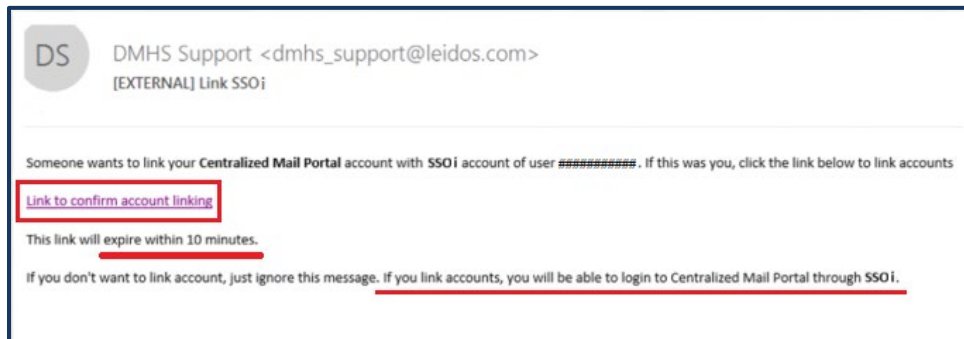


DMHS Support will send a **Link SSOi email** with instructions for linking the accounts. It may take up to five (5) minutes from when the **Link SSOi** window appears to receive this email. If you do not receive the email, click the **Re-Send the Email** option in the **Link SSOi** window.

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

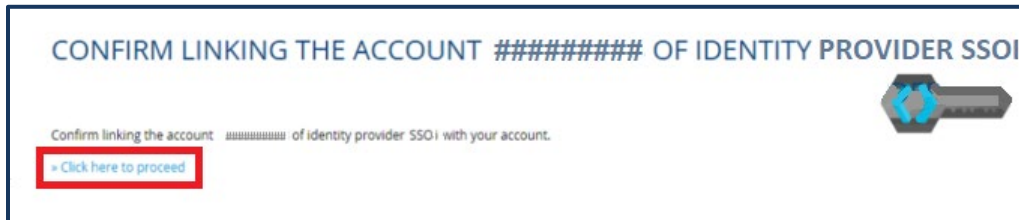
When you receive the **Link SSOi** email, click the link provided to open **Confirm Linking the Account** in a new browser window. The email link expires within **10** minutes from receipt.

Figure 8: DMHS Support Link SSOi Email



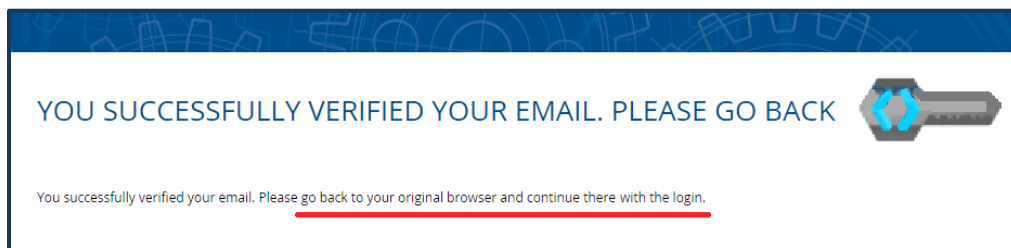
Select **Click here to proceed** in the **Confirm Linking the Account** window.

Figure 9: Confirm Linking the Account Window



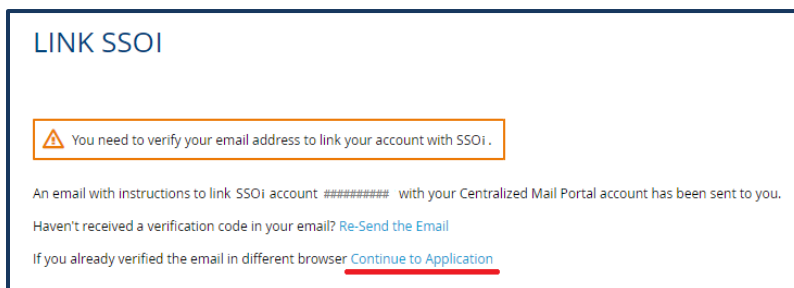
A confirmation message indicates that you successfully verified your email address.

Figure 10: Successful Verification Confirmation Window



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

Figure 11: Link SSOi Window – Continue to Application



If you have an active CM Portal account, you are automatically 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 **VA Employee/Authorized Contractor** button on the **User Identification** screen.

Figure 12: User Identification Screen

Centralized Mail Portal

User Identification

Please select the user type below that best matches you.

Veteran

Veteran Family Member

VSO/VA Business Partner

**VA Employee/
Authorized Contractor**

Return to Login

U.S. Department of Veterans Affairs

leidos

The **VA User Registration** window displays. 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 13: VA User Registration Window

VA User Registration

You are required to submit an official Vendor Portal Access Request Form via the OBPI-VCIP Issue Tracker located here:

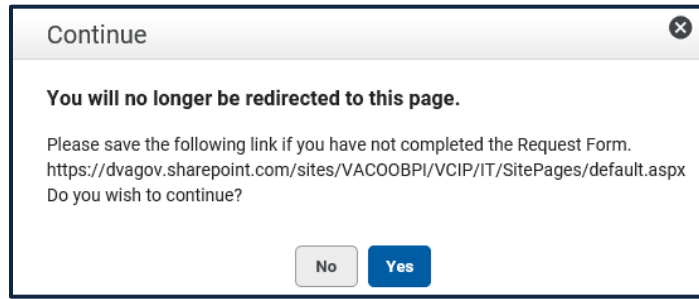
[Vendor Portal Access Request Form](#)

Continue

The System Administrator verifies your account and assigns a **User Role** and permissions before you can sign in to the CM Portal.

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

Figure 14: Continue Message Window



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

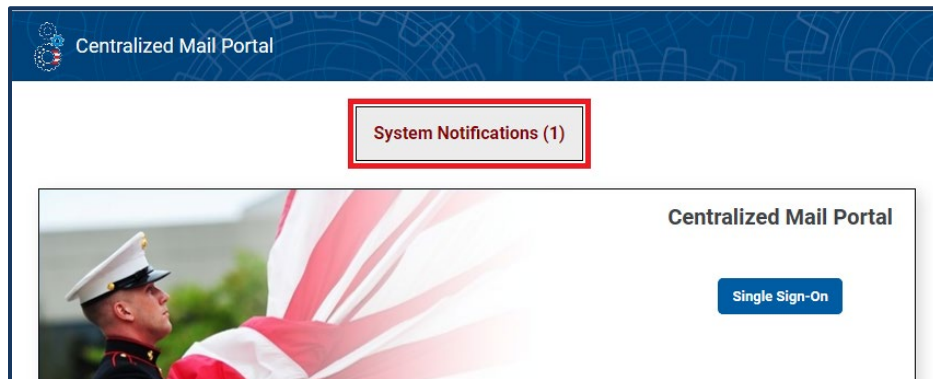
Click **Yes** to redirect to the **Vendor Portal Access Request Form** and complete the **VA User Registration** process. Selecting **No** returns to the **User Identification** screen.

2.3 System Notifications Prior to Access

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

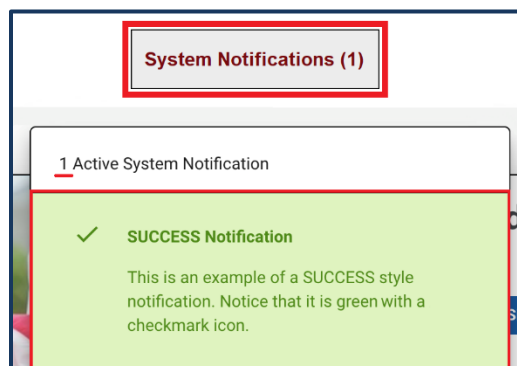
The **System Notifications** button displays at the top of the **CM Portal Home Page** when announcements (indicated by the number in parenthesis) are available.

Figure 15: CM Portal Home Page System Notifications



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

Figure 16: 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:





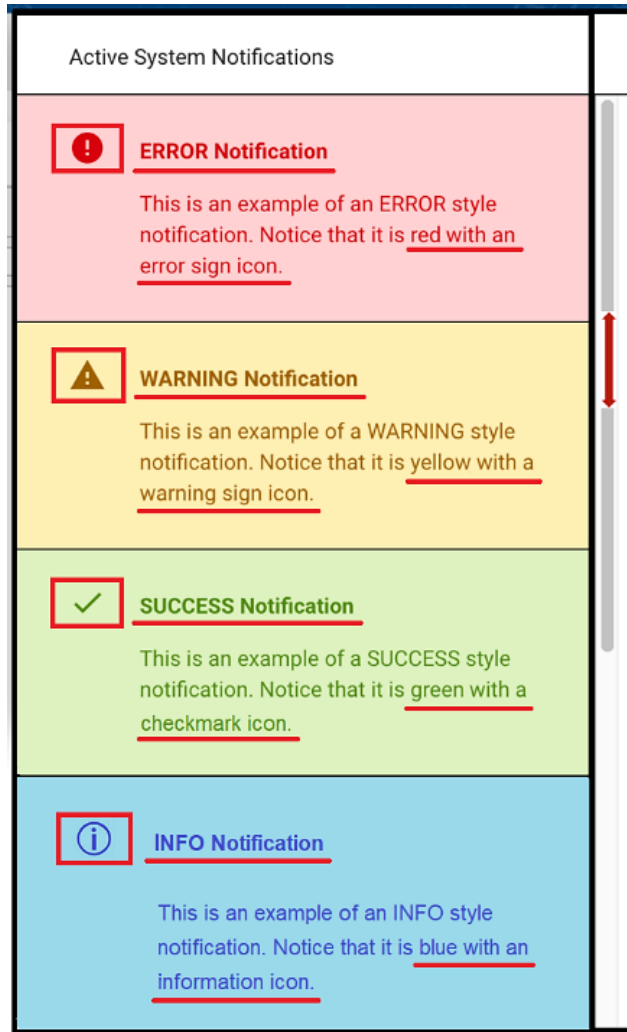
- **ERROR** Notification – red with an **Error Sign**  icon
- **WARNING** Notification – yellow with a **Warning Sign**  icon
- **SUCCESS** Notification – green with a **Checkmark**  icon
- **INFO** Notification – blue with an **Information Sign**  icon

Figure 17: 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.

2.4 Frequently Asked Questions (FAQ)

Frequently Asked Questions (FAQ) provide explanations that address common concerns and issues prior to accessing the CM Portal:

- Information
- Resources
- Access Instructions
- Troubleshooting Techniques
- Support Assistance (technical or VA benefits)

Click on the **FAQ** hyperlink in the middle of the **CM Portal Home Page** ([Figure 3](#)) to open the **FAQ** document in a new browser tab.

3 Application Toolbar

The **Application Toolbar** at the top of the screen 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 18: Entire CM Portal Application Toolbar



3.1 Centralized Mail

The **Centralized Mail** option processes a packet from the point of receipt by the CM Portal until final disposition (uploaded to the Veterans Benefits Management System [VBMS], marked as Unidentified Mail, etc.). The Centralized Mail button displays if an assigned User Role has CM access permission. CM functionality is described in Sections [6–7](#).

3.2 Direct Upload

The **Direct Upload (DU)** option processes benefit claim documents submitted by Veterans, Veteran family members, Veteran representatives, accredited Veterans Service Organizations (VSO), or authorized VA personnel directly to the CM Portal. The Direct Upload button displays if an assigned User Role has DU access permission. Direct Upload functionality is explained in the CM Portal Direct Upload (DU) User and Training Manual ([Section 3.5](#)).

3.3 Admin

The **Admin** (Administration) option adds, modifies, and deletes or disables User Roles, User accounts, Locations, Trigger Documents, Emergent Categories, and DU Organizations. The Admin button displays if an assigned User Role has Admin access permission. Administration functionality is described in [Section 8](#).

3.4 System Notifications



System Notifications (represented by **Stationary**  and **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 19: 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:





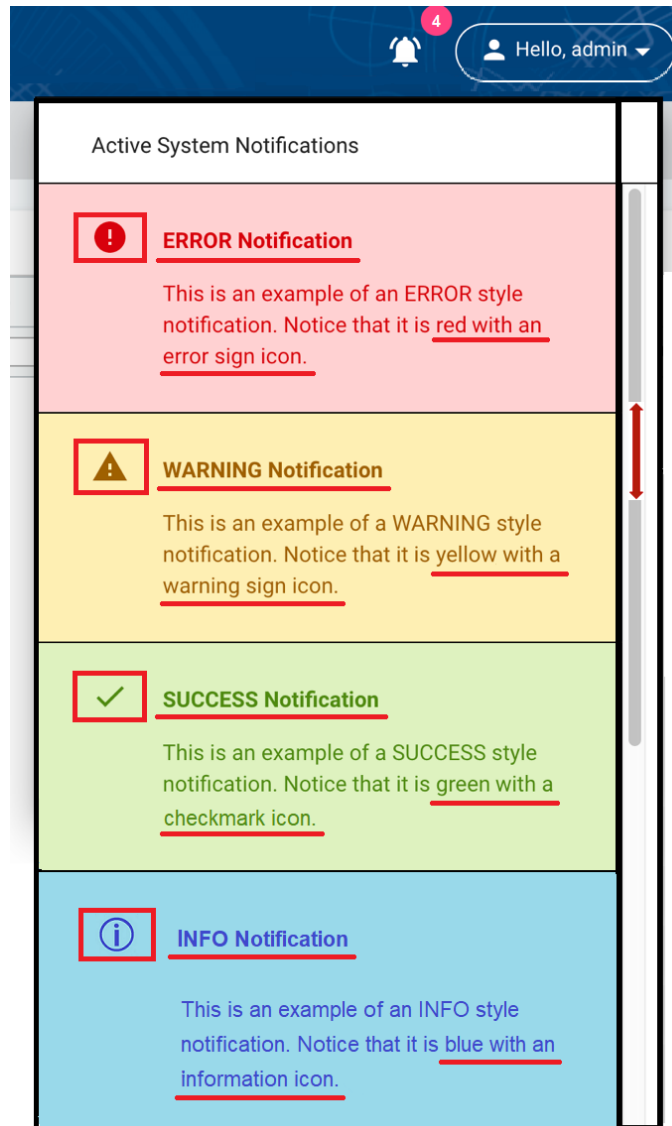
- **ERROR** Notification – red with an **Error Sign**  icon
- **WARNING** Notification – yellow with a **Warning Sign**  icon
- **SUCCESS** Notification – green with a **Checkmark**  icon
- **INFO** Notification – blue with an **Information Sign**  icon

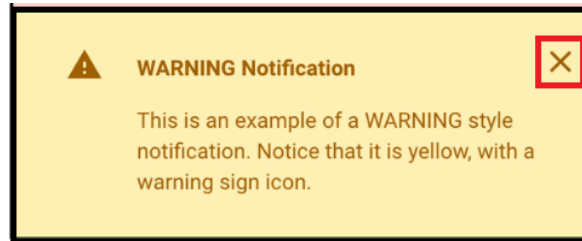
Figure 20: System Notifications Window with All Four Notification Categories



Certain **System Notifications** are 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 **System Notification** either permanently or temporarily deletes the message. **System Notifications** without the **X** icon are removed solely by the System Administrator.

Figure 21: 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 System Notification posts during the current session.

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


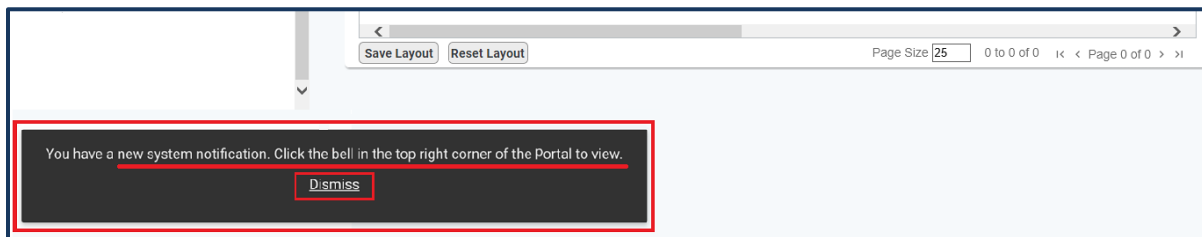
Proceed to the **Ringing Bell**  icon to reveal the **System Notifications** window. Check periodically for updates or new messages.

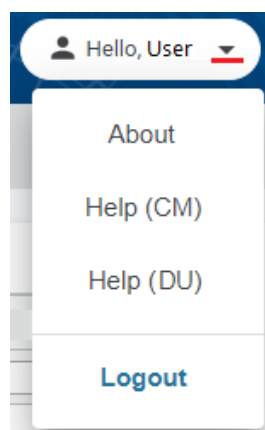
Figure 22: New System Notification Message Window



3.5 Hello, User

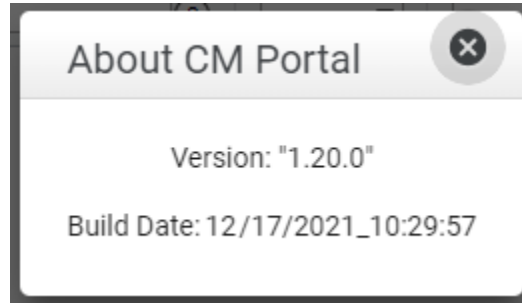
Your **User Account** button is located on the far right side of the **Application Toolbar**. The **Down Arrow** reveals the **options menu**. Click anywhere on the screen outside of the **User Account Options Menu** to close it without making a selection.

Figure 23: User Account Options Menu



About provides information on the CM Portal **Version** and **Build Date**.

Figure 24: About CM Portal Window



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

Help (DU) opens the **CM Portal Direct Upload (DU) User and Training Manual** in a new browser tab.

Logout ends the 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 the session after **60** minutes of inactivity.

4 User Roles, Permissions, and Queues

User Role and **Location** assignments govern CM Portal functionality access; therefore, you may not have access to all applications or functions.

The CM Portal supports eight (8) standard VA User Roles:

- Basic User
- Basic User + Automatic Assignment
- Super User
- Supervisor
- Records Management Officer (RMO)
- National Reviewer
- Quality Assurance (QA) User
- Contracting Officer's Representative (COR)

Each **User Role** is assigned to at least one (1) **Location**. Only three (3) exceptions have permission for all Locations:

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

Refer to [Section 8.2.1](#) for descriptions of custom VA User Roles with Single Sign-On Internal/External (SSOi/SSOe) access to the **Centralized Mail** and/or **Direct Upload** applications. Certain custom VA User Roles must be assigned together with standard VA User Roles to enable permissions and access for assigned **Locations**.

4.1 Basic User Role

The Basic User performs these functions at assigned Locations:

- Perform a Do Not Upload action on a packet (assigns Download Confirmed Packet Status)
- Request a Rescan of a packet
- Request a Split or perform a manual internal Split on a packet
- Route a packet between the Work and Hold Queues
- Request that a packet is designated as Unidentified/Unidentifiable Mail (UM)
- Route a packet to the Reassign Queue for a new Location assignment
- View assigned packets in the Centralized Mail Queue
- View all User packets in Centralized Mail Search results (unrestricted Locations and assigned restricted Locations)
- Perform Basic User functions on packets assigned to any User in the CM Search results

- Process packets in the Work Queue using Automatic Workflow Mode Only at designated Locations
- Upload a packet to the VBMS
- Add or view Packet Notes
- Download packet documents
- Review packet and document history
- Export CM Search Results into a comma-separated value (CSV) or Microsoft Excel file
- Mark packet as Unread

4.2 Basic User + Automatic Assignment Role

The Basic User plus (+) Automatic Assignment performs the same functions as a Basic User at assigned Locations that participate in Automatic Packet Assignment to the Work Queue ([Section 4.9.2](#)).

4.3 Super User Role

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

- Process packets in the Authorization Queue (Split and first-level Rescan requests)
- Perform a manual internal Split on packets in the Authorization and Assignment Queues
- Assign packets in the Reassign Queue to a new Location
- Assign packets to Users for processing

4.4 Supervisor User Role

The Supervisor performs the same functions as a Super User at assigned Locations plus this additional action:

- Process packets in the Unidentified Mail First Queue

4.5 Records Management Officer (RMO) User Role

The RMO performs these functions at assigned Locations:

- Process packets in the Unidentified Mail Final Queue
- View packets
- Review packet and document history
- Download a packet to a local workstation
- Export CM Search Results into a CSV or Microsoft Excel file
- View and add Packet Notes to any packet using CM Search results
- Mark packet as Unread

4.6 National Reviewer User Role

The National Reviewer performs these read-only functions at all unrestricted Locations:

- View packets
- Review packet and document history
- Download a packet to a local workstation
- Export CM Search Results into a CSV or Microsoft Excel file
- View and add Packet Notes
- Mark packet as Unread

4.7 Quality Assurance (QA) User Role

The Quality Assurance User performs these read-only functions at all (including restricted) Locations:

- View packets
- Review packet and document history
- Download a packet to a local workstation
- Export CM Search Results into a CSV or Microsoft Excel file
- View and add Packet Notes
- Mark packet as Unread

4.8 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 All Queue (final-level Rescan requests)
- Process packets in the Unidentified Mail Final Queue
- Add, update, and delete Users, Roles, Locations, Trigger Documents, Emergent Categories, and DU Organizations ([Section 8](#))
- Perform a Retrigger action on a completed packet
- Search the Direct Upload application (My Uploads Tab) for specific Veterans/Submitters/packets or to view all DU packets (click the Search button without entering any Search Criteria)

4.9 Queues

Packets are placed into various processing **Queues** based on current **Packet Status** ([Section 6.4](#)). The packet resides in a particular Queue until **Actions** ([Section 7.3](#)) are performed that progress it to another Queue. **Queue** assignments are dictated by **User Roles**, which are listed in **Table 1**.

Table 1: Queue Assignments Based on User Role

User Role	Queue	Description
Basic User	Hold	Contains packets with a temporary Hold Status for delayed processing pending additional information
	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 with Rescan or Split requests that require Supervisor or Super User authorization
	Hold	Contains packets with a temporary Hold Status for delayed processing pending additional information
	Reassign	Contains packets that require rerouting to a different LOB and/or Location 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 with Rescan or Split requests that require Supervisor or Super User authorization
	Hold	Contains packets with a temporary Hold Status for delayed processing pending additional information
	Reassign	Contains packets that require rerouting to a different LOB and/or Location for processing
	Unidentified Mail (UM) First Authorization	Contains packets that Basic Users or Super Users designated as Unidentified Mail
	Work	Contains packets assigned to a specific User at a specific Location for processing
RMO	Unidentified Mail (UM) Final Authorization	Contains packets that a Supervisor authorized as Unidentified Mail
National Reviewer (read-only access)	Assignment	Contains packets pending assignment to a Work Queue
	Authorization	Contains packets with Rescan or Split requests that require Supervisor or Super User authorization
	Hold	Contains packets with a temporary Hold Status for delayed processing pending additional information
	Reassign	Contains packets that require rerouting to a different LOB and/or Location for processing
	Unidentified Mail (UM) First Authorization	Contains packets that Basic Users or Super Users designated as Unidentified Mail
	Unidentified Mail (UM) Final Authorization	Contains packets that a Supervisor authorized as Unidentified Mail
	Work	Contains packets assigned to a specific User at a specific Location for processing

User Role	Queue	Description
Quality Assurance (read-only access)	Assignment	Contains packets pending assignment to a Work Queue
	Authorization	Contains packets with Rescan or Split requests that require Supervisor or Super User authorization
	Hold	Contains packets with a temporary Hold Status for delayed processing pending additional information
	Reassign	Contains packets that require rerouting to a different LOB and/or Location for processing
	Unidentified Mail (UM) First Authorization	Contains packets that Basic Users or Super Users designated as Unidentified Mail
	Unidentified Mail (UM) Final Authorization	Contains packets that a Supervisor 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 with Rescan or Split requests that require Supervisor or Super User authorization
	COR Authorization All	Contains all packets that Super Users or Supervisors authorized for Rescan by a conversion Vendor
	Hold	Contains packets with a temporary Hold Status for delayed processing pending additional information
	Reassign	Contains packets that require rerouting to a different LOB and/or Location for processing
	Unidentified Mail (UM) First Authorization	Contains packets that Basic Users or Super Users designated as Unidentified Mail
	Unidentified Mail (UM) Final Authorization	Contains packets that a Supervisor authorized as Unidentified Mail
	Work	Contains packets assigned to a specific User at a specific Location for processing

4.9.1 Hold Queue – Duration and Alert Notification

Packets may be temporarily transferred to the **Hold Queue** for delayed processing until additional information and instructions are received.

When packets linger in the **Hold Queue** beyond the approved duration, a daily **Hold Queue Alert** email reminder is distributed by **DMHS Support** to affected **Assigned Users**. The alert email lists information for all packets exceeding the hold period in the **Hold Queues** from all **Locations** assigned to that **User** account.

Alert notifications commence after a packet resides in the **Hold Queue** for **24** hours (default hold period). Each **Hold Queue** in the system may have a different established duration.

Hold Queue durations are modified solely by the System Administrator under the direction of VCIP. Contact the **CM Portal Help Desk** ([Section 1.3](#)) to alter or remove hold period thresholds and alert notifications.

4.9.2 Work Queue – Automatic Packet Assignment

Automatic Packet Assignment transfers up to five (5) packets with the oldest Portal Entry Dates from the **Assignment Queue** to the **Work Queue** of the next available (signed in and active) **Basic User + Automatic Assignment** at that participating Automatic Packet Assignment Location.

The **Automatic Packet Assignment** process replenishes the **Work Queue** with new packets each morning and as necessary throughout the day to ensure continuous workflow. All packets remaining in the **Work Queue** at the end of the day (logged out and inactive) return to the **Assignment Queue** at that **Location**. Packets in the **Hold Queue** are not affected by **Automatic Packet Assignment** and remain in the **Hold Queue**.

Review the **Packet History** ([Section 7.3.15](#)) for the packet assignment record.

A **COR** must designate the following **User Role Permission** and **Location Access** setting for a **User Role** plus the **Location** accessibility setting for a specific Location to activate **Automatic Packet Assignment** in the **Work Queue** for that User Role at that Location:

- **User Role Menu Item Permission – Automatic Packet Assignment**
- **User Roles Settings Add/Edit – Location Access – Role has access to no Locations** (Locations are assigned to Users in the “Admin – Users” module.)
- **Location** accessibility setting – **Allows Automatic Packet Assignment**

5 Display Controls

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

5.1 Horizontal Display Controls


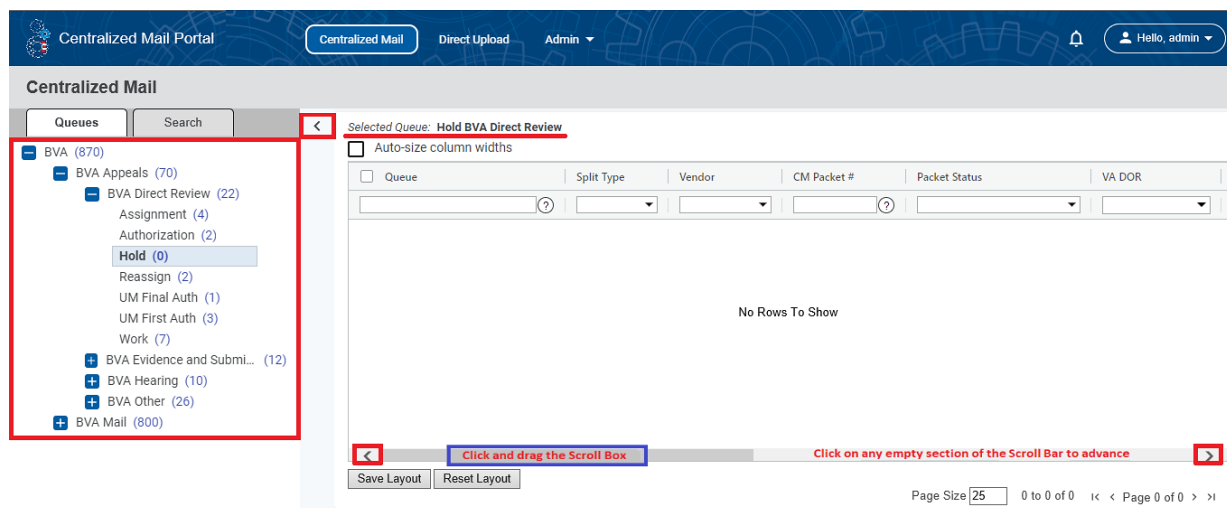
The **horizontal display** shows all data to the far left side of the window when the **Left Arrow**  icon is visible on the upper left side of the **Task Bar** above the **Selected Queue** or **Search Results Grid** (or on any screen in the application). This is the standard view for the main screen 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 25: Left Arrow Standard Main Screen View



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




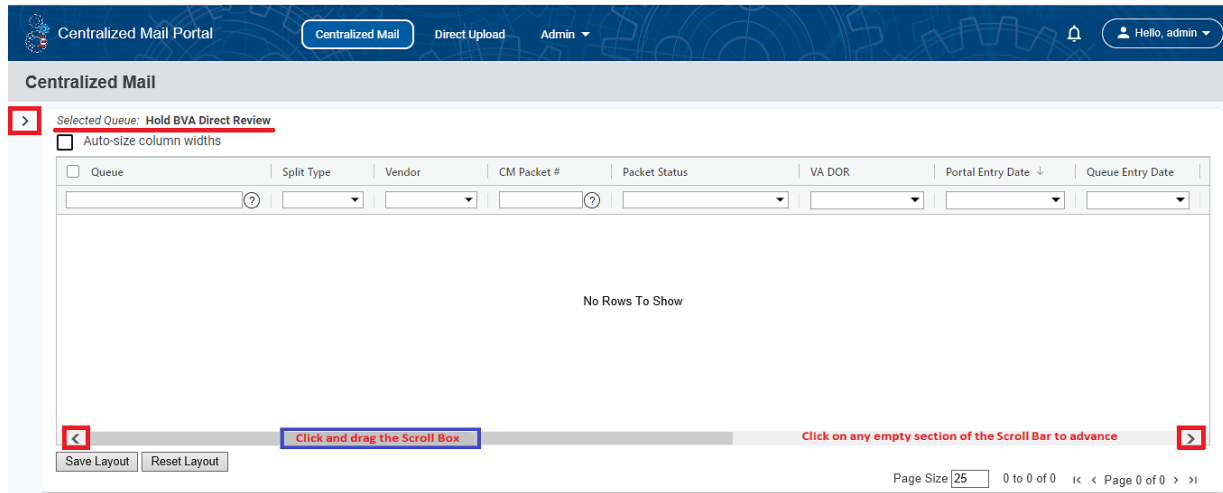
- **Left**  and **Right**  **Scroll Arrow** icons on the **Horizontal Scroll Bar** at the bottom of the window – single click repeatedly or click and hold on the left mouse button depending on the desired advancement speed.
- The gray **Scroll Box** (highlighted in blue) – click and hold to drag.
- Any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

Figure 26: Left Arrow Changes to Right Arrow in Expanded Screen View



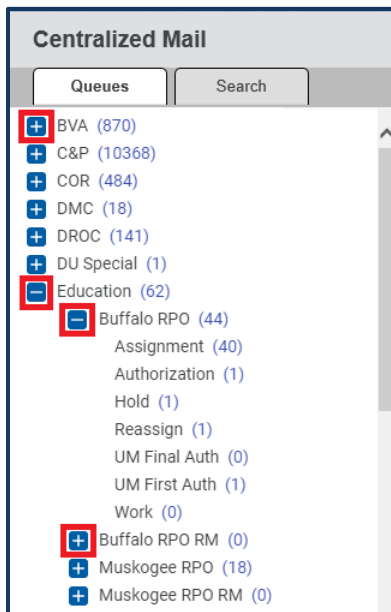
The **Left Arrow** < icon changes to a **Right Arrow** > icon in the expanded screen view. Use the **Scroll Arrows, Box, or Bar** at the bottom of the window to view additional information in either direction.

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 27: Vertical Display Controls – Blue Icons





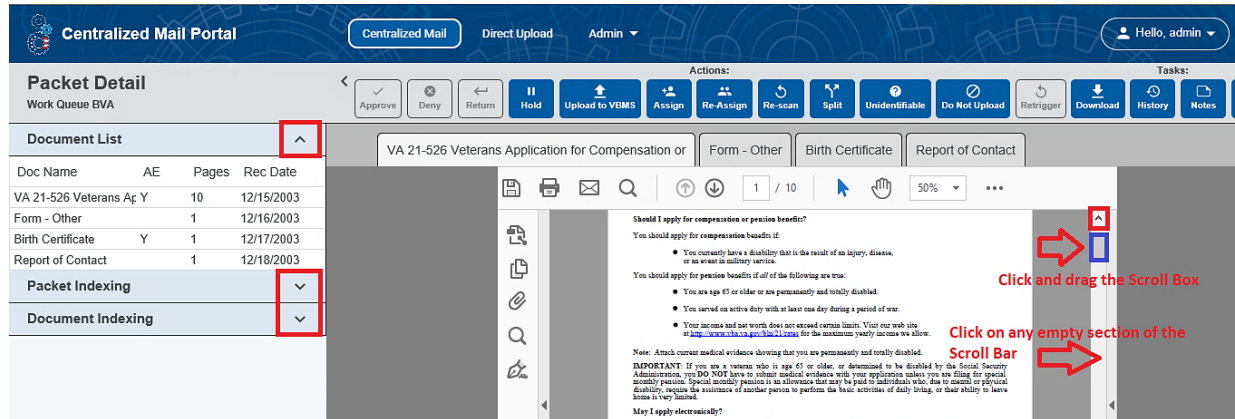


The **vertical display** may also be **expanded** to view additional information using the **Down Arrow**  icon or **contracted** for a cleaner presentation with the **Up Arrow**  icon, especially in the menu options on the left side of the screen.

Figure 28: 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 left mouse button 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 (1) 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 (middle of the **Status Bar**) and pressing the **Enter** key. The default **Page Size** is **25** rows, while the maximum **Page Size** is **500** rows. Approximately nine (9) rows are visible in the **Results Grid** before using the **Vertical Scroll Bar** to move up or down 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 **Save Layout** button (far left side of the **Status Bar**) preserves the desired dimensions and arrangement from **Results Grid Customization** ([Section 6.2.2.3](#)).
- The **Reset Layout** button (left side of the **Status Bar**) reloads the page and restores the default display settings for column size, order, and organization.

Figure 29: Page Display Controls



6 Centralized Mail (CM)

The **Centralized Mail (CM)** application processes a 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.

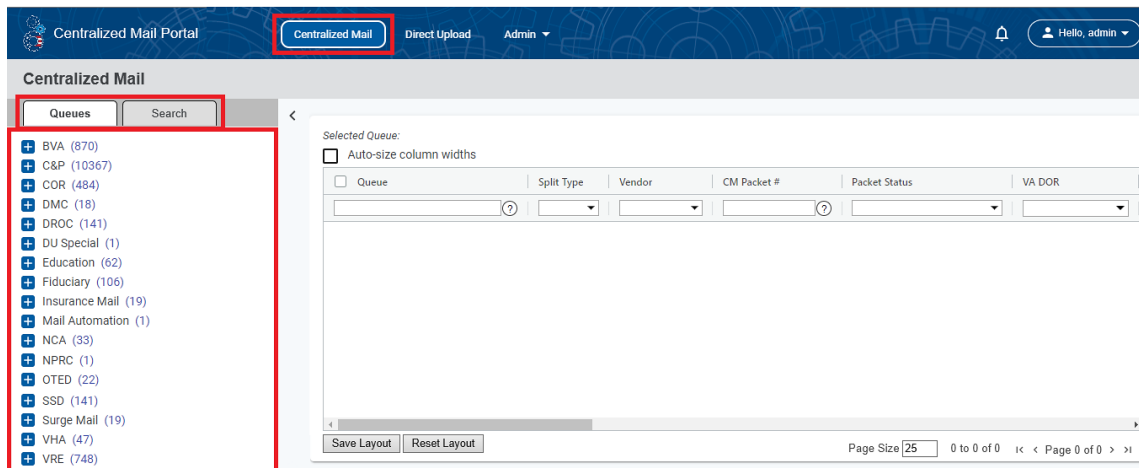
Figure 30: CM Portal Application Toolbar – Centralized Mail



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

- The **Queues Tab** displays all assigned packets in 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 31: Centralized Mail Home Page



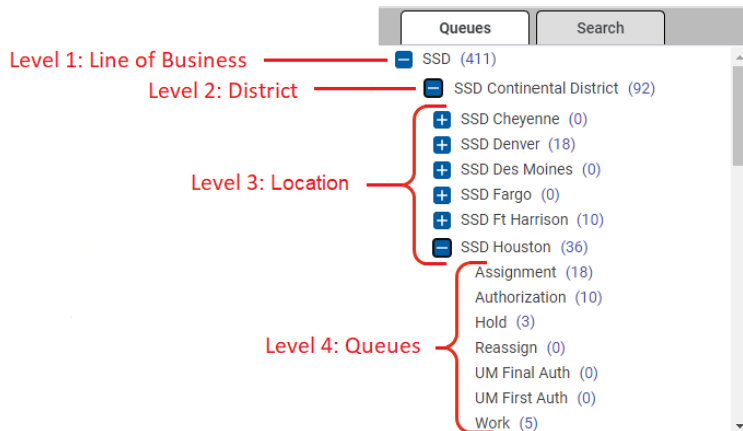
6.1 Queue Hierarchy

Each packet in the CM Portal is associated with a specific **Line of Business**, **Location**, and **Queue** displayed in a tree structure known as the **Queue Hierarchy** on the **Queues Tab**. Users process packets that reside in various **Queues** ([Section 4.9](#)) for their assigned **Location(s)**.

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

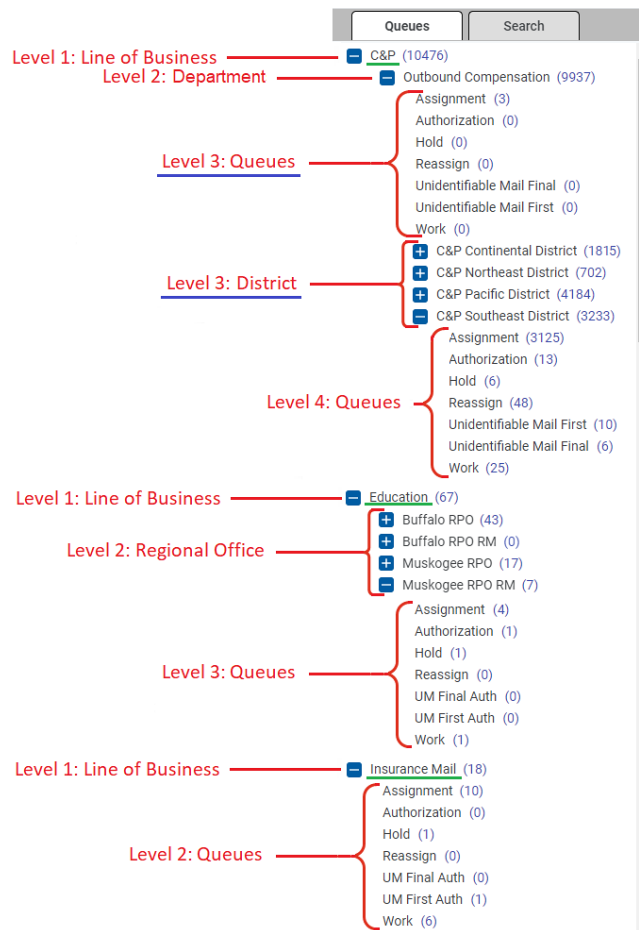
- **Level 1 – Line of Business** (e.g., BVA, C&P, and COR – see [Appendix A](#) for acronym definitions)
- **Level 2 – District** (e.g., Continental, Northeast, and Pacific)
- **Level 3 – Location** (e.g., Milwaukee, St. Paul, and Philadelphia)
- **Level 4 – Queues** (e.g., Assignment, Authorization, Hold, and Work)

Figure 32: Standard Queue Hierarchy Example





Levels 2–4 are flexible and may deviate from the standard Queue Hierarchy to accommodate program organizational structure, processing functions, and Location types for a specific Line of Business (Level 1). For example, a Line of Business may have program departments, Locations, or Queues on Level 2 instead of Districts. Level 3 may contain department groups, Districts, or Queues instead of Locations. Queues on Levels 2–4 display above other hierarchical types on the same level.

Figure 33: Specialized Queue Hierarchy Examples



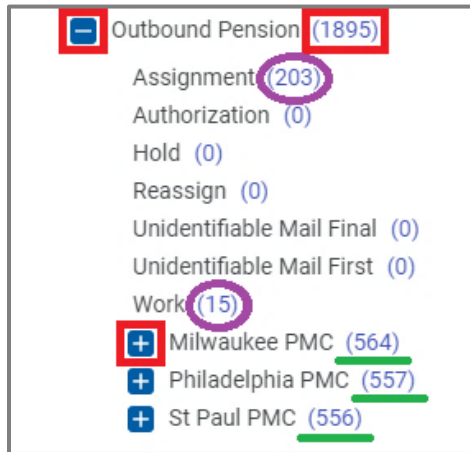
6.1.1 Queue Hierarchy Navigation and Packet Count

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

Click the **Level/Location/Queue name** to display all packets for that Level/Location/Queue in the **Results Grid**.

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

Figure 34: Queue Hierarchy Navigation and Packet Count



In the figure above, there are **1,895 total** packets for Outbound Pension (**Level 2** in the **Queue Hierarchy**), which is the sum of the packets in the **Queues** (circled in purple) and Pension Management Center (PMC) **Locations** (underlined in green) on **Level 3**.

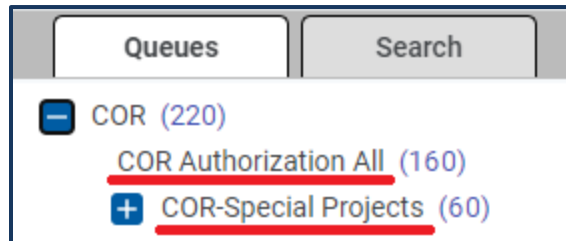
6.1.2 Special Processing for COR Users

A **COR** has authorization to perform all functions on all packets at all **Locations**. The specialized **COR Queue Hierarchy** is organized by processing category.

The **COR Line of Business** on **Level 1** has two (2) processing groups on **Level 2**:

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

Figure 35: COR Line of Business on Level 1 in the Queue Hierarchy



6.2 CM Packet Results Grid

The **CM 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 **Level/Location/Queue** is chosen for viewing in the **Queue Hierarchy** on the **Queues Tab**, the selection is highlighted in blue. The **Selected Queue** also displays above the **Results Grid**. Summary information about packets is accessed using the **Horizontal, Vertical, and Page Display Controls** ([Section 5](#)).

Figure 36: CM Packet Results Grid Display

Queue	Split Type	Vendor	CM Packet #	Packet Status	VA DOR	Portal Entry Date
Assignment Queue VRE Atlanta		CSRA	2003250224	Processing	03/25/2020	03/26/2020
Assignment Queue VRE Atlanta		CSRA	2003250220	Processing	03/25/2020	03/26/2020
Assignment Queue VRE Atlanta		CSRA	2003250222	Processing	03/25/2020	03/26/2020
Assignment Queue VRE Atlanta		CSRA	2003250221	Processing	03/25/2020	03/26/2020
Assignment Queue VRE Atlanta		CSRA	2003250227	Processing	03/25/2020	03/26/2020
Assignment Queue VRE Atlanta		CSRA	2003250223	Processing	03/25/2020	03/26/2020
Assignment Queue VRE Atlanta		CSRA	2003250226	Processing	03/25/2020	03/26/2020
Assignment Queue VRE Atlanta		CSRA	2003250228	Processing	03/25/2020	03/26/2020

6.2.1.1 Results Grid Columns

The **Results Grid** provides basic packet information separated into **19** column topics:

- **Queue** – processing category in which the packet resides based on its current status ([Section 4.9](#))
- **Split Type** – icons identifying **Original**  and **New Split**  packets ([Section 7.3.9](#))
- **Vendor** – conversion Vendor that administers packet creation, quality, and upload into the CM Portal
- **CM Packet Number** – unique numerical identifier assigned to the packet
- **Packet Status** – current workflow processing stage ([Section 6.4](#))
- **VA Date of Receipt (DOR)** – packet-level **DOR** established using the date on which the most recent document (newest Received Date) is acquired by the VA from the originating **Source** ([Section 7.2.3](#))
- **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
- **Vet Last Name** – legal Veteran surname
- **Vet First Name** – legal Veteran given name
- **Document Type** – VA document names/numbers that identify essential documents in the packet
- **Notes** – most recent annotations regarding the packet ([Section 7.3.16](#))

- **EMERG – Emergent Flash** (situation) associated with the packet that requires priority processing
- **Source** – submission origin of the CM documentation used to create the packet ([Appendix A](#))
- **Service Code** – reporting field for conversion **Vendor** workflow based on the submission **Source** ([Appendix A](#))
- **Confirmation Number** – unique numerical identifier assigned to a **Direct Upload** submission ([Section 3.2](#))
- **Assigned User** – first and last names of the CM Portal User designated to process the packet
- **Assigned Username** – account name (usually generated from the email address) for the CM Portal User designated to process the packet


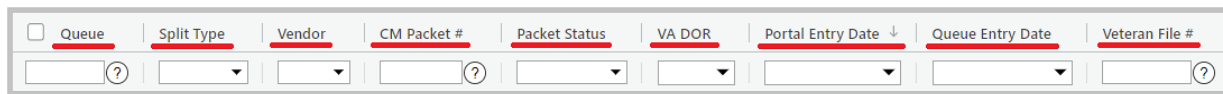
The **horizontal display** shows all data to the far left side of the window when the **Left Arrow**  icon is visible on the upper left side of the **Task Bar** above the **Results Grid**.

Figure 37: Results Grid Columns – Far Left Standard Main Screen View




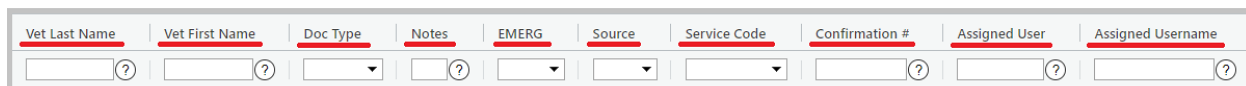
Use the **Right**  **Scroll Arrow** on the **Horizontal Scroll Bar** at the bottom of the window to access the remaining columns on each page.

Figure 38: 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 ([Section 7.3](#)).

6.2.2.2 Double-Click Packet Opening

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

6.2.2.3 Results Grid Customization

All customized **Results Grid Column Resizing**, **Column Reordering**, and **Sorting** display settings can be retained for future use in the **Selected Queue**, even after logging out of the CM Portal.


The **Save Layout** button on the far left side of the **Status Bar** at the bottom of the page preserves the desired dimensions and arrangement.

Results Grid Filtering cannot be saved as part of the customized layout.

Select the **Reset Layout** button to restore the default display settings.

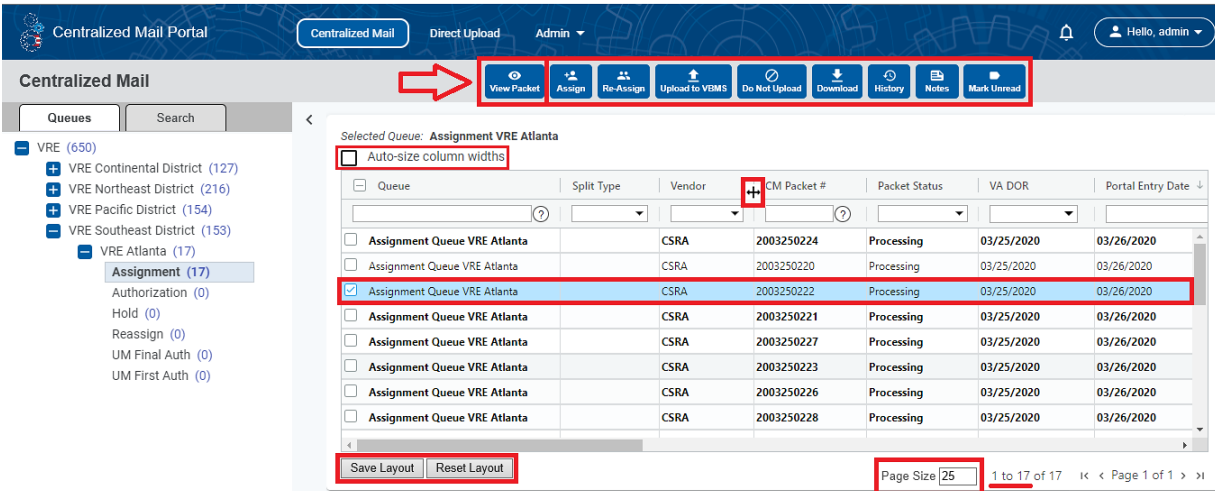
6.2.2.4 Column Resizing

Columns in the **Results Grid** can be resized to suit personal preference. Manually resize individual columns to the desired width or automatically resize all columns to fit the longest column entry:

- **Manual Resizing** – Position the 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.
- **Automatic Resizing** – Mark the **Auto-size column widths** checkbox above the **Results Grid** (left side) to resize all columns to fit the longest column entry for the rows displayed. Column width may vary on each page based on the **Page Size** setting ([Section 5.3](#)) and the column entries for the row group shown. Clear the **Auto-size column widths** checkbox to return all columns to their previous width (customized or default setting).


The **Save Layout** button on the far left side of the **Status Bar** at the bottom of the page preserves the desired column dimensions. Select the **Reset Layout** button to restore the default column size.

Figure 39: Results Grid Functionality – Packet Selection and Column Resizing



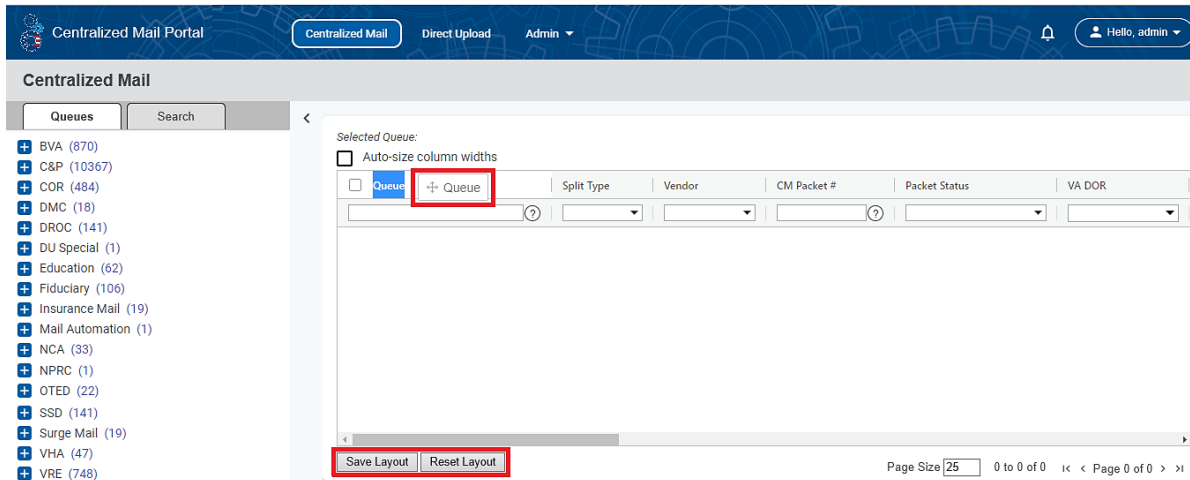
6.2.2.5 Column Reordering

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

- Place the cursor in the header of any 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 **Save Layout** button on the far left side of the **Status Bar** at the bottom of the page preserves the desired column arrangement. Select the **Reset Layout** button to restore the default column order.

Figure 40: Column Reordering



6.2.2.6 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 41: Upward and Downward Sorting Arrows

CM Packet # ↑	CM Packet # ↓
40 Highest/Newest	22 Lowest/Oldest
36 Letter Z	23 Letter A
35	24
34	25
32	26
31	28
29 Upward	29 Downward
28 Letter A	31 Letter Z
26 Lowest/Oldest	32 Highest/Newest

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 arrow indicates the sort order in which the data is arranged.

The **Results Grid** rows are sorted automatically by the **Portal Entry Date** column (default setting) from oldest to newest. Remove the **Downward** ↓ **Sorting Arrow** icon from that column header (if desired) to begin customizing the column sorting arrangement.

Text value columns sort the string of text on each row in the column by searching for case-insensitive patterns (e.g., starts with, contains, and ends with). Column sorting results are in alphabetical order.

Text value columns treat numbers as characters in the string of text instead of numeric values. Sorting using a string search varies from a numeric search, so the results are not necessarily listed in sequential numeric order. Numbers are sorted by each individual number (character) in the string of text/numbers.

The following text value columns (not an all-inclusive list) may not sort results in sequential numeric order: **Document Type, Notes, and Assigned Username.**

In the figure below, the **Queue** column is sorted first in alphabetical order (downward). Based on that organization, the information is 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 42: Results Grid Sorting Example

<input type="checkbox"/> Queue 1 ↓	Vendor 2 ↑	CM Packet # 3 ↓
<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 (if applicable). Multiple packets with the same event date are organized in either ascending or descending order by time of occurrence (**Portal Entry Date** and **Queue Entry Date**) 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 DOR** column is sorted first from oldest to newest (downward). Based on those results, packets are 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 DOR** 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 DOR**.

Figure 43: Results Grid Date Sorting Example – Multiple Columns

VA DOR 1 ↓	Portal Entry Date 2 ↓	Queue Entry Date 3 ↓
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

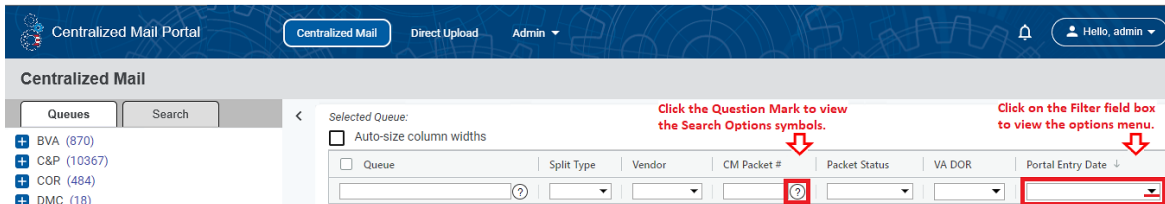
The **Save Layout** button on the far left side of the **Status Bar** at the bottom of the page preserves the desired column sorting arrangement. Select the **Reset Layout** button to restore the default content order.

6.2.2.7 Results Grid Filtering

All columns in the **Results Grid** have a **Filter** field below 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 box or the **Down Arrow** to view the **options menu**. Click anywhere in the **Results Grid** to close the menu. The **Question Mark** (?) icon on the right side of the field box displays the **Search Options** symbols list. The **X** icon closes the **Search Options** window.

Figure 44: Results Grid Filter Field



6.2.2.7.1 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 one (1) 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).

Different **Search Options** symbols cannot be combined in the **Filter** field; however, two (2) **Wildcard** characters * or several **Multiple** characters ; are permitted to define the search results.

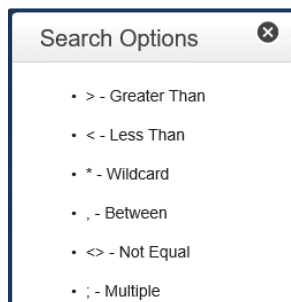
Filter fields accept letters, numbers, and special characters as search parameters to filter column results. Rows containing numbers are not necessarily listed in sequential numeric order, and rows with text are not necessarily alphabetized.

Click the **X** icon on the right side of the field box or select and delete the search parameter (using the mouse and keyboard) to remove the current entry and return all rows to the **Results Grid**.

Position the **Wildcard** character * after letters, numbers, and special characters with no extra space to find all results that begin with those letters, numbers, and special characters. If the **Wildcard** character * is placed before the letters or numbers, the filter displays all results ending with those letters or numbers. Text is not case-sensitive. The **Wildcard** character * is not a valid **Search Options** symbol in the **Confirmation Number** column.

Use a **Wildcard** character * at the beginning and ending of a **Filter** search parameter to find all results containing the letter(s), number(s), and special character(s) entered.

Figure 45: 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** – position **Wildcard** character * at the beginning and/or ending of the search parameter:
 - “Smi*” filters results showing only rows where the column contents begin with “Smi”.
 - “*as” returns all results in the column ending with “as”.
 - “*Da.*” displays all rows containing “d”, “a”, and a period in the column contents.
- **, 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** – “125;4970;83614” filters results showing only rows where the column contents are exactly 125 or 4970 or 83614.

6.2.2.7.2 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 box or the **Down Arrow** to view the **options menu**. Select one (1) or more options 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 **X** icon on the right side of the **Filter** field box deletes the search parameter(s) and returns all rows to the **Results Grid**.

Figure 46: Vendor Options Menu

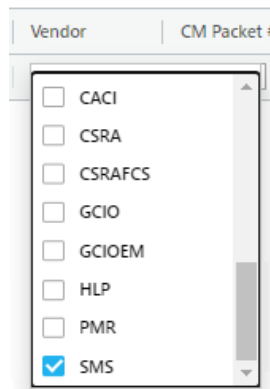


Figure 47: Delete Search Parameters Using the X Icon

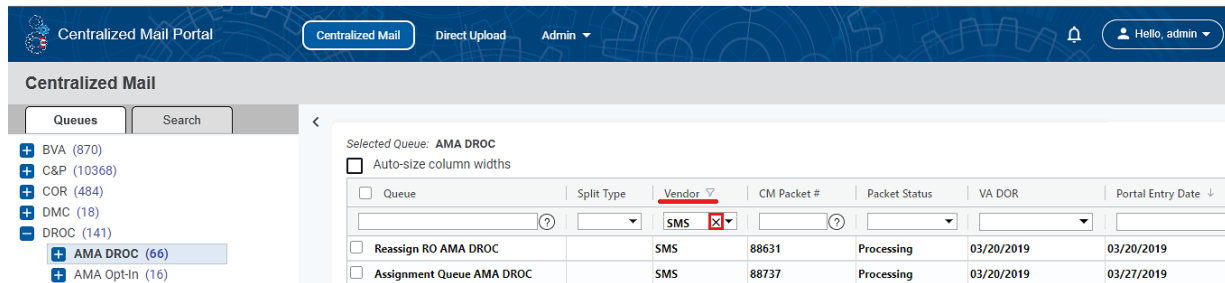
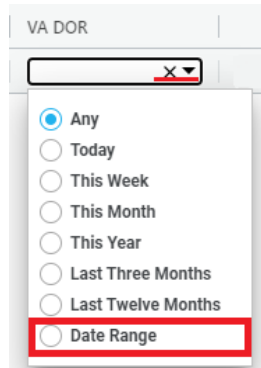
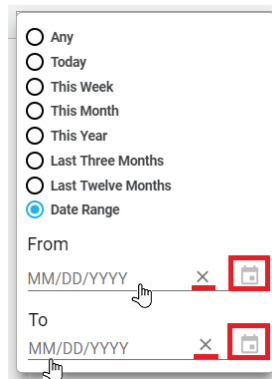


Figure 48: Date Options Menu



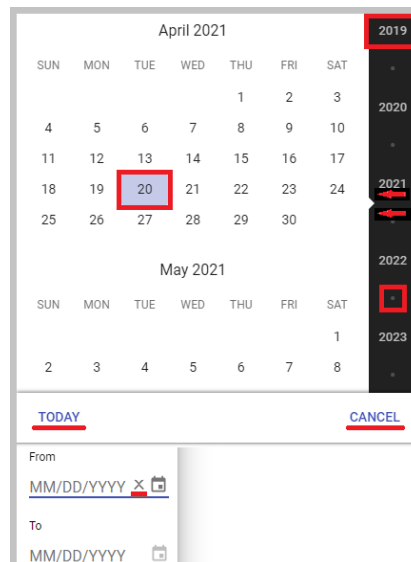
Selecting **Date Range** from the date options menu offers a calendar selector to choose the correct dates.

Figure 49: 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 50: Calendar Selector



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

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 displays 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 51: 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.

The **X** icon on the right side of the **Filter** field box deletes the date search parameter and returns all rows to the **Results Grid**.

6.2.2.8 Selecting Rows

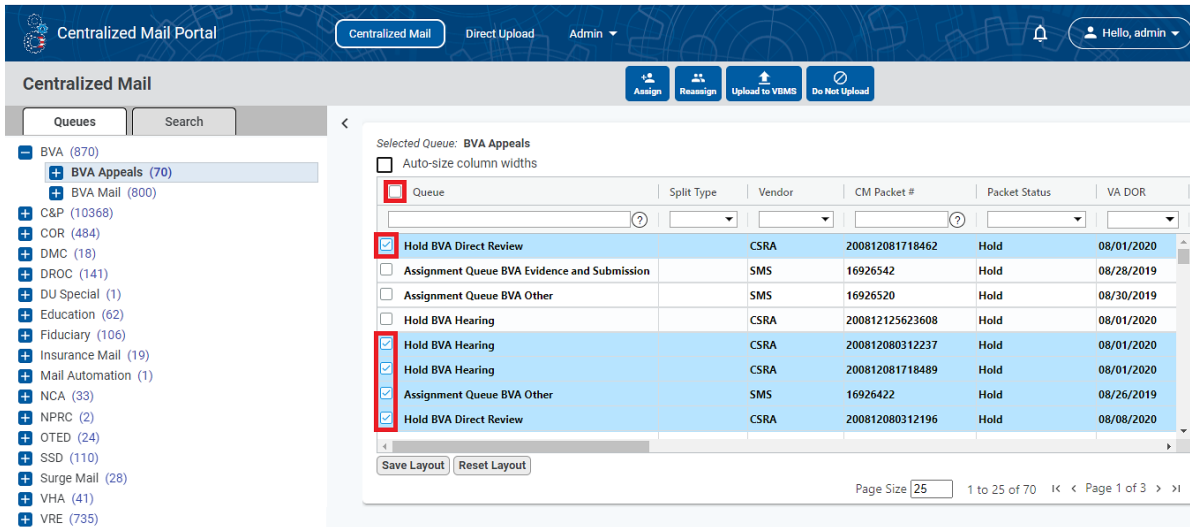
Select one (1) row for processing by clicking anywhere along the desired row in the **Results Grid**. A selected row has a blue checkmark and is highlighted in blue.

Select multiple rows by marking the checkbox on the left side of the desired rows.

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

Deselect one (1) row by clicking the blue checkmark. Click anywhere along one (1) desired row to deselect multiple rows. Clear the checkbox on the left side of the first column header to deselect all rows.

Figure 52: Selecting Rows



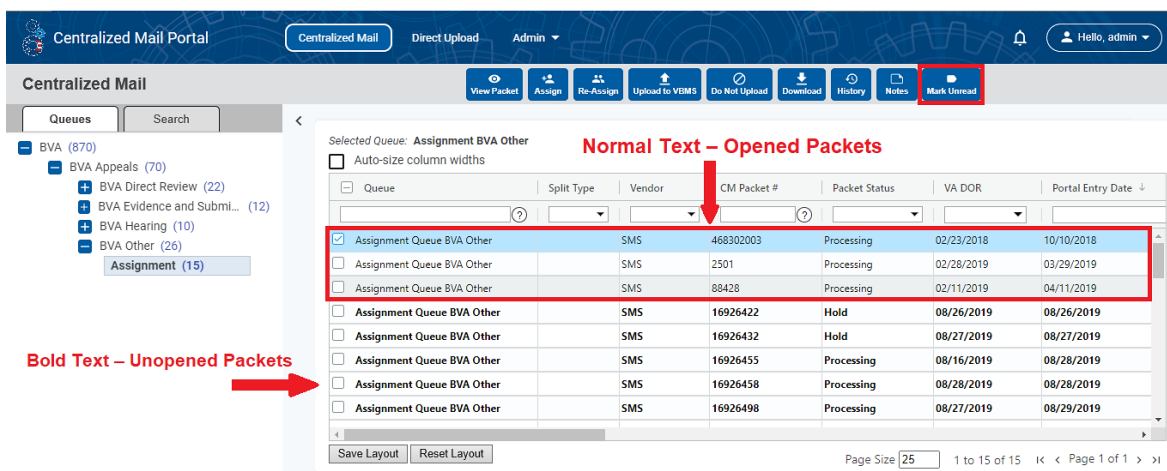
6.2.2.9 Packet Phase Indicator – Opened versus Unopened

To indicate **Packet Phase**, unopened packets display in **bold** text, while opened packets display 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 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 displays in **bold** text in the new User’s Queue until opened by the new User.

Change the **Packet Phase** from opened to unopened by selecting the row and clicking the **Mark Unread** button ([Section 7.3.18](#)) on the **Task Bar**. The text reverts to **bold** font.

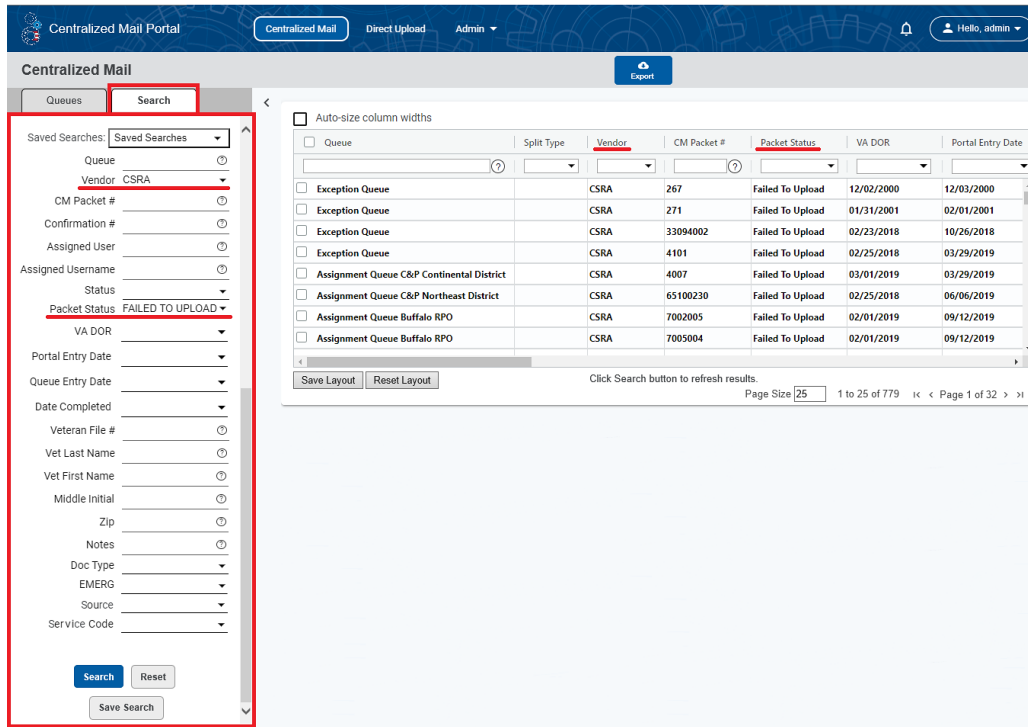
Figure 53: Opened and Unopened Packet Phase Indicator



6.3 Search for a Packet

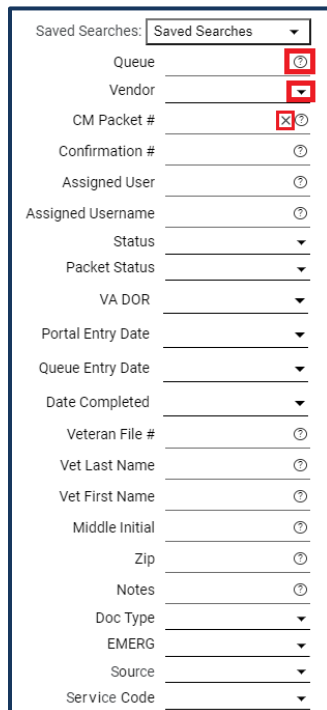
The **Search Tab** is on the right side of the **Queues Tab** on the left side of the screen. The **Search** function retrieves all packets in the CM Portal from unrestricted **Locations** and assigned restricted **Locations** that match defined **Search Criteria**.

Figure 54: 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**. The **X** icon deletes the field entry. Use the **Vertical Scroll Bar** to view the entire **Search Criteria** list.

Figure 55: 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 one (1) symbol (no space before or after) with the search parameter for the chosen criteria. The **X** icon closes the **Search Options** window.

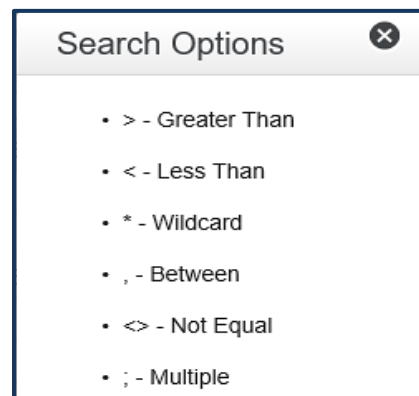
Different **Search Options** symbols cannot be combined in the **Search Criteria** field; however, two (2) **Wildcard** characters * or several **Multiple** characters ; are permitted to define the search results.

Search Criteria fields accept letters, numbers, and special characters as search parameters to locate column results. Rows containing numbers are not necessarily listed in sequential numeric order, and rows with text are not necessarily alphabetized.

Position the **Wildcard** character * after letters, numbers, and special characters with no extra space to find all results that begin with those letters, numbers, and special characters. If the **Wildcard** character * is placed before the letters or numbers, all results ending with those letters or numbers display. Text is not case-sensitive. The **Wildcard** character * is not a valid **Search Options** symbol in the **Confirmation Number** column.

Use a **Wildcard** character * at the beginning and ending of a search parameter to find all results containing the letter(s), number(s), and special character(s) entered.

Figure 56: Search Options Symbols



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

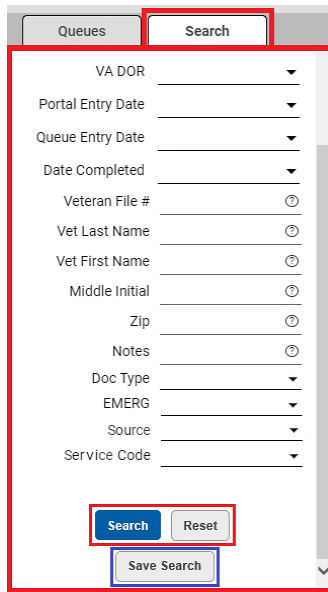
- **> Greater Than** – “>200” filters results showing only rows where the column contents are greater than 200. “>L” filters results showing only text starting with the letter M.
- **< Less Than** – “<100” filters results showing only rows where the column contents are less than 100.
- *** Wildcard** – position **Wildcard** character * at the beginning and/or ending of the search parameter:
 - “Smi*” filters results showing only rows where the column contents begin with “Smi”.
 - “*as” returns all results in the column ending with “as”.
 - “*Da.*” displays all rows containing “d”, “a”, and a period in the column contents.
- **, 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** – “125;4970;83614” filters results showing only rows where the column contents are exactly 125 or 4970 or 83614.

Down Arrows reveal the **options menus** that display a list of choices to specify **Search Criteria**. Mark the checkbox to select one (1) or more options. Refer to [Section 6.2.2.7.2](#) 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. The **X** icon deletes any field entry if necessary. 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 the CM Portal session ends.

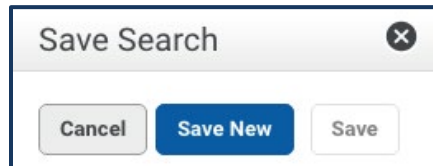
Figure 57: Search, Reset, and Save Search Buttons



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 **X** icon stops the action and exits the window, if not saving the **Search**.

Figure 58: Save Search Window

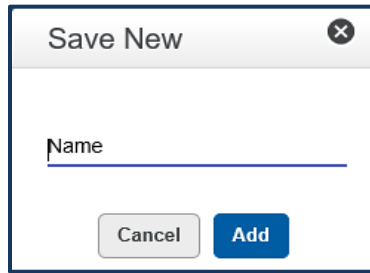


The **Save** button activates only when using a previous Saved Search. This enables adjusting the **Search Criteria** as necessary using the same Saved Search name.

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 in the **Save New** window to archive the new **Search** in the **Saved Search** file. The **Cancel** button or the **X** icon exits the **Save New** action.

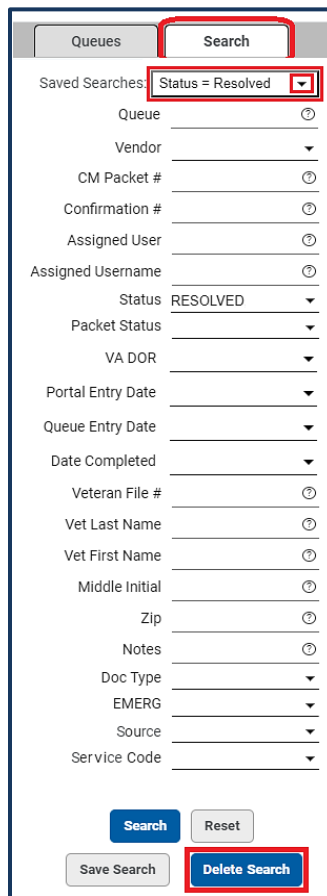
Figure 59: Save New Search Window



6.3.3 Select a Saved Search

Use the **Saved Searches** options menu at the top of the **Search Tab** to locate a **Saved Search**. Click on the desired **Search** name. **Search Criteria** populate automatically into their respective fields, and the search engages. The related packets display in the **Results Grid**.

Figure 60: Saved Searches Options Menu



6.3.4 Delete a Saved Search

The **Delete Search** button (below **Search** and **Reset** on the right side of **Save Search**) removes the current **Saved Search** from the **Saved Searches** 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 Option

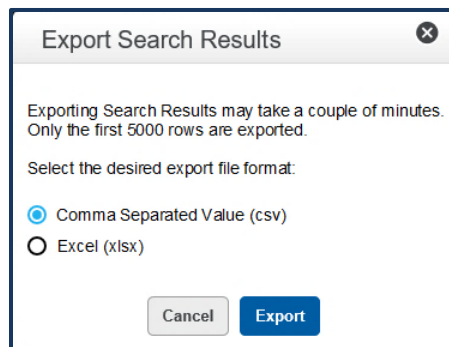
The **Export** option creates a comma-separated value (CSV) or Microsoft Excel file to download CM Search Result data into a spreadsheet format. This feature is only available on the **Search Tab** and located on the **Task Bar** at the top of the screen.

Figure 61: Export Button



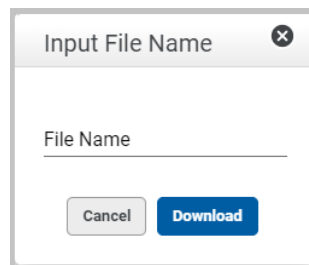
Click the **Export** button to activate the **Export Search Results** window. Select the desired export file format.

Figure 62: Export Search Results Window



The **Cancel** button or the **X** icon terminates the export process and exits the window. The **Export** button opens the **Input File Name** window.

Figure 63: Input File Name Window



The **Cancel** button or the **X** icon stops the action and returns to the **Export Search Results** window. Click the **Cancel** button or the **X** icon there to terminate the export process.

Enter a **File Name** that does not contain leading spaces, ending spaces, or certain special characters. An **Error** message appears if the **File Name** is invalid or omitted.

The **Download** button initiates the **Export** process. The **Export** file includes all **Search Results Grid** columns in the default column order. **Results Grid Filtering** is reflected in the file; customized **Results Grid Column Reordering** and **Sorting** are not included.

The file lists the newest **5000** packets based on **Portal Entry Date**, starting with the most recent.

6.4 CM Packet Status Values

Two (2) **Status Values** indicate the current state of a packet:

- **Overall Status:**
 - **Resolved** – Processing has ceased and no further action is required, unless the **COR** determines that a **Retrigger** action ([Section 7.3.13](#)) is necessary.
 - **Unresolved** – Work is pending on the packet.
- **Packet Status** – more defined level below **Overall Status** that specifies the workflow processing stage

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

Table 2: Packet Status Value Descriptions

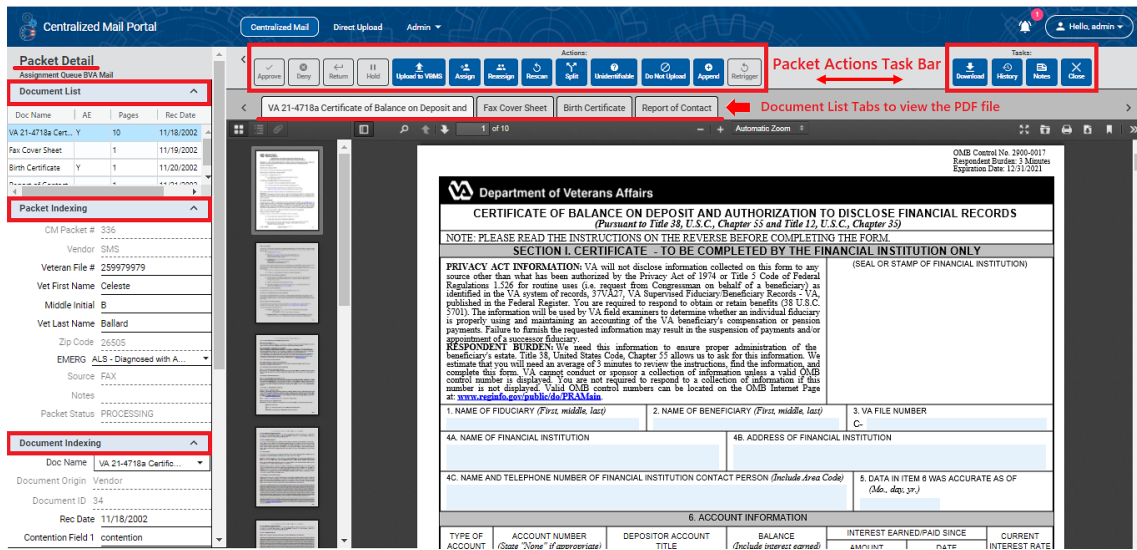
Overall Status	Packet Status	Description
Resolved	Complete	<ul style="list-style-type: none"> • The packet was uploaded to the VBMS. • The original packet was separated through a Split request. • The original packet was reprocessed through a Rescan request.
	UM Confirmed	The packet was marked as Unidentified Mail.
	Download Confirmed	The Do Not Upload action prevented packet transmission to the VBMS.
Unresolved	Processing	This is the default status for a packet, which indicates that action is being taken.
	Hold	This is a temporary status to delay processing.
	Split Pending	A Split request is waiting for approval by an authorized User (e.g., Supervisor).
	Split Confirmed	All approvals for a Split request are complete.
	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.
	Rescan Confirmed	All approvals for a Rescan request are complete.
	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	An upload to the VBMS is pending completion.
	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 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 **CM Packet Number**, conversion **Vendor**, **Veteran File Number**, **Veteran Name**, **Emergent Flash(es)**, and packet material **Source** (e.g., mail, fax, or Direct Upload)
- **Document Indexing** – basic document information such as **Document Name**, **Document Origin** (Vendor or Appended), **Received Date**, and **Contention Field** comments

Figure 64: Packet Detail Screen



7.1 Open a Packet on the Packet Detail Screen

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

- A **double** click anywhere along any row in the **Results Grid** automatically opens the selected packet.
- Select the packet with a **single** click anywhere along the row in the **Results Grid** (highlighted in blue), and click the **View Packet**  button on the **Task Bar**.
- Click on the **Packet Count** number (in parenthesis) in the **Queue Hierarchy** on the **Queues Tab** to initiate **Automatic Workflow Mode** ([Section 7.4](#)) for the associated **Level/Location/Queue**.

The **Queue** and **Location** in which the packet currently resides display in the **upper left** corner of the screen **below Packet Detail**.

Figure 65: Packet Detail Queue and Location Information



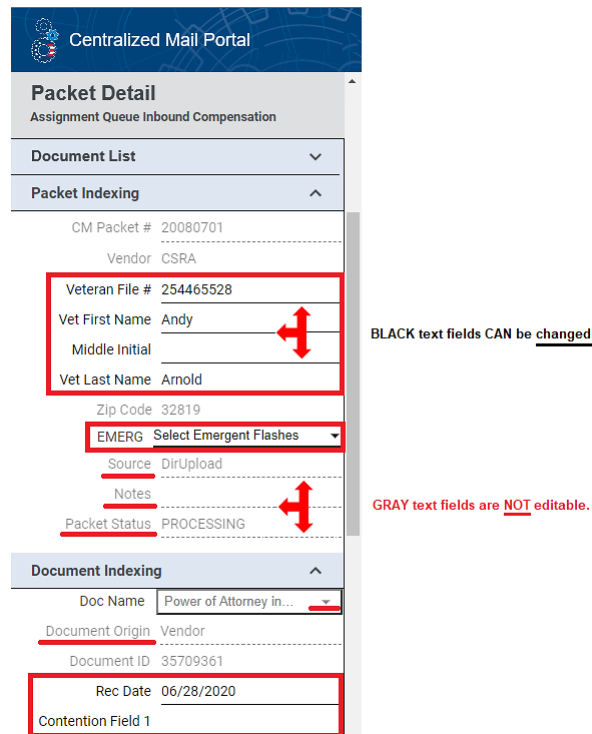
7.2 Packet Detail Menu

Certain fields in the **Packet/Document Indexing** menus on the left side of the screen can be modified. Fields shown in gray text are not editable. Fields shown in black text can be updated. **Location** (Level) configuration designated by a **COR** dictates modification permission for specific fields.

All fields are read-only (gray text) when the **Packet Status** is **Complete** or **Confirmed** ([Section 6.4](#)).

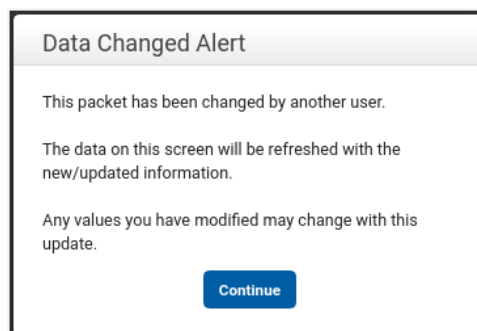
The vertical display expands or contracts using the **Up** and **Down Arrows** and the **Vertical Scroll Bar**. The **Document/Packet List** and **Indexing** menus retain their settings (extended or collapsed) based on the last packet viewed when reopening the **Packet Detail** screen during the current session.

Figure 66: Editing Packet/Document Indexing Fields



The most current packet version always displays. When another User saves changes to the same packet being viewed, packet data updates immediately. The **Data Changed Alert** message window announces the packet information update. The **Continue** button returns to the **Packet Detail** screen.

Figure 67: Data Changed Alert Window



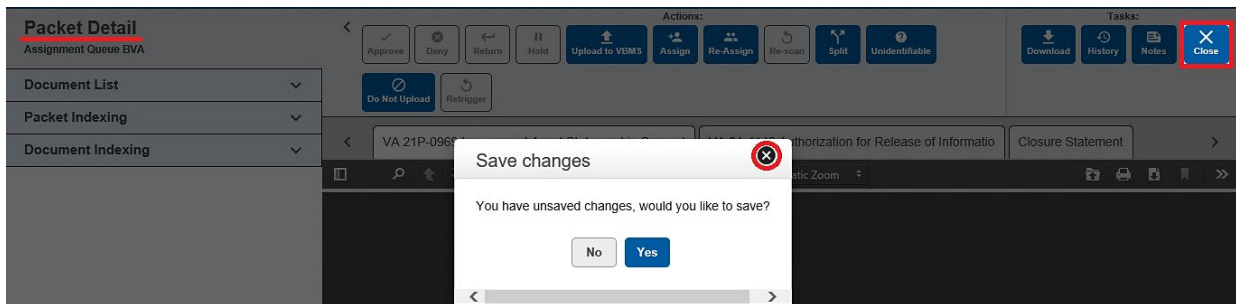
Any unsaved **Packet/Document Indexing** revisions made prior to the **Data Changed Alert** are eliminated during the packet information update. Enter the **Packet/Document Indexing** information corrections again, if necessary.

Click the **Close** button on the far right side of the **Task Bar** to exit the **Packet Detail** screen.

Before exiting or performing an **Action** on the **Task Bar**, there is an opportunity to save changes made to **Packet/Document Indexing** information in the **Save Changes** window. Select **Yes** to proceed with saving or **No** to discard all entries.

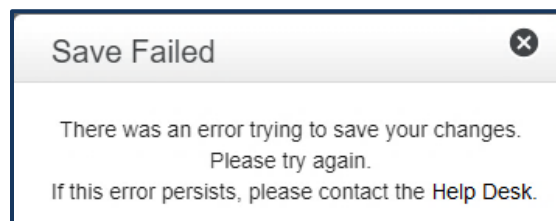
The **X** icon in the upper right corner of the **Save Changes** window returns to the **Packet Detail** screen.

Figure 68: Save Changes for Packet/Document Indexing



The **Save Failed** message window appears when the system is unable to preserve the updated information. The **X** icon in the upper right corner of the **Save Failed** window returns to the **Packet Detail** screen.

Figure 69: Save Failed Window



Modify the **Packet/Document Indexing** information again and **Close** the **Packet Detail** screen or perform an **Action** on the **Task Bar** to activate the **Save Changes** window. Contact the **CM Portal Help Desk** ([Section 1.3](#)) if the **Save Failed** issue persists.

7.2.1 Document List

The **Document List** contains all documents included in the packet with the total number of pages per document and date received. **AE** (Yes) indicates the document was included in the discontinued **Auto-Establish/AutoCEST** process.

The first document in the **Document List** displays by default in the **Document Viewer**. Click on any row in the list to view another document or select a **Document List Tab** above the viewing screen. The chosen document information and corresponding **Document List Tab** are highlighted to identify the document shown.


Appended Documents ([Section 7.3.12](#)) are located at the end of the **Document List** and **Document List Tabs** (far right side), which are denoted by the **Append Button Plus Sign**  icon on the right side of the tab.

Figure 70: Document List

Packet Detail			
Assignment Queue C&P Northeast District			
Document List			
Doc Name	AE	Pages	Rec Date
VA 21-526 Veterans App...	Y	10	08/23/2004
Form - Other		1	08/24/2004
Birth Certificate	Y	1	08/25/2004
Report of Contact		1	08/26/2004


Figure 71: Document List Tabs



7.2.2 Packet Indexing

Packet Indexing is located below the **Document List**. Fields shown in gray text are not editable. All fields shown in black text can be modified.

Figure 72: Packet Indexing Fields

Document List	
Packet Indexing	
CM Packet #	98299912346
Vendor	SMS
Veteran File #	106317005
Vet First Name	Tex
Middle Initial	
Vet Last Name	Hill
Zip Code	98563
EMERG	Select Emergent Flashes 
Source	MAIL
Notes	
Packet Status	PROCESSING
Document Indexing	

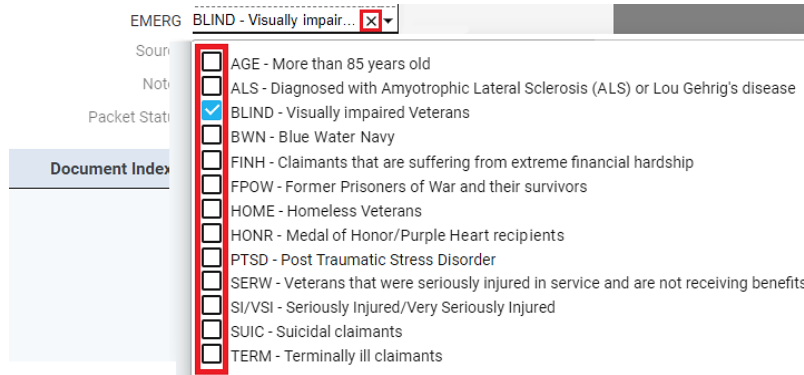
A United States **Zip Code** indicates a domestic mailing address, whereas an international **Postal Code** denotes a foreign mailing address. Either **Zip Code** or **Postal Code** displays based on the address.

The **Source** field discloses the submission origin of the CM documentation used by the conversion **Vendor** to create the packet: mail, email, fax, Direct Upload, Private Medical Record (PMR) Program, **Split** request ([Section 7.3.9](#)), Benefits Intake Application Programming Interface (API), National Call Center (NCC), and Fugitive Felon Status (FFS).

Claims associated with emergent situations (e.g., serious illness, financial hardship, or advanced age of 85 years or older) require priority processing and expedited handling at all stages of the claims process. An **Emergent Flash** is a packet-level indicator that represents a significant benefit claim attribute, fact, or status that is unlikely to change. Click the **Down Arrow** on the **EMERG (Emergent Flashes)** field to designate (flash) an emergent situation for the claim.

Select one (1) or more categories from the **options menu** by marking or clearing the checkbox. The **Emergent Flashes** (emergent situations) appear in the **EMERG** field. Click anywhere on the left side of the menu to close it. The **X** icon deletes the field entry.

Figure 73: Emergent Flashes Options Menu



7.2.3 Document Indexing

Document Indexing is located below **Packet Indexing**. Fields shown in gray text are not editable. All fields shown in black text can be modified. **Location** (Level) configuration designated by a **COR** dictates modification permission for specific fields.

Figure 74: Document Indexing Fields

Document List		▼
Packet Indexing		▼
Document Indexing		▲
Doc Name	VA 21-526 Veterans ...	▼
Document Origin	Vendor	
Document ID	190102902	
Rec Date	11/15/2004	
Date must be entered in MM/DD/YYYY format		
Contention Field 1	contention	comment

Correct the **Document Name** (if necessary) of any document in the **Document List** prior to **Upload to VBMS** ([Section 7.3.5](#)). Click the **Down Arrow** to select a Master Category List (MCL) **Document/Form Name** from the **options menu**. Filter the options menu by typing part of the document name/type to reduce the choices or scroll through the entire list. Text is not case-sensitive. **Document Name** corrections are recorded in the **Document History** ([Section 7.3.15](#)).

Document Origin indicates whether a document was processed by a conversion **Vendor** or **Appended** to the packet in the CM Portal ([Section 7.3.12](#)). The **Document ID** (Identification) Number is a unique numerical identifier assigned for document validation (**Vendor** or **Appended**).

Change the **Received Date** (if necessary) of any document in the **Document List** prior to **Upload to VBMS** (Section 7.3.5). Select and delete the entire date or incorrect number(s) using the mouse and keyboard. Manually reenter a valid date in the **MM/DD/YYYY** (two-digit **Month**/two-digit **Day**/four-digit **Year**) format. An **Error** message appears if the **Received Date** is invalid or omitted. **Received Date** edits are recorded in the **Document History** (Section 7.3.15).

Modifying the **Received Date** of any document processed by a conversion **Vendor** may alter/update the **VA Date of Receipt (DOR)** for the packet (date on which the most recent packet document [newest Received Date] is acquired by the VA from the originating **Source**) shown in the **Results Grid** on the **Queues** and **Search Tabs**. **Received Dates** for **Appended Documents** do not alter the **VA Date of Receipt (DOR)** for the packet.

Enter various claimant conditions and issues in the **Contention Fields**. Select and delete the **Contention** comment using the mouse and keyboard.

The **CM Upload** fields (read-only) below the **Contention Fields** provide system-generated information regarding **Upload to VBMS** status for the document shown.

All fields remain empty until an **Upload to VBMS** transmission occurs. Field information populates for a successful VBMS upload (**Complete Packet Status – CM Upload Date**) or an unsuccessful upload attempt (**Failed to Upload Packet Status – CM Upload Error Code and Error Description**).

The **CM Upload Transmission Count** field tracks the total number of **Upload to VBMS** transmission instances (successful and unsuccessful) for the document.

The Digits-to-Digits (**D2D**) service enables VSO claims management systems to submit electronic Veteran benefit claims directly into the VBMS. The VBMS assigns a **D2D Claim ID** (Identification) Number to claims received through the **D2D** service.

AE (true/false) indicates whether the document was included in the discontinued **Auto-Establish/AutoCEST** process.

Figure 75: Document Indexing Fields Continued

Contention Field 9	
CM Upload Date	
CM Upload Error Code	
CM Upload Error Description	
CM Upload Transmission Count	
D2D Claim ID	010
Pages	10
AE	true

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 the **Adobe Acrobat Reader** version installed, you may see a document without any **Toolbar**. If this occurs, move the cursor to the top of the document, and hover there until the abbreviated **Toolbar** appears.

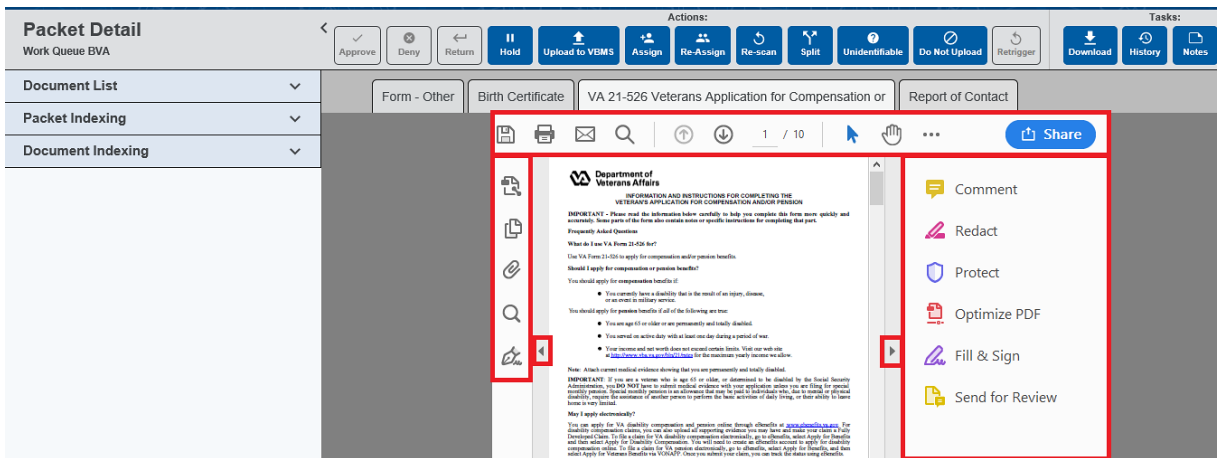
Click on the **Adobe logo** on the far right side of the **Toolbar** to enable and display the entire Toolbar and **Menu**.

Figure 76: Adobe Acrobat Reader Abbreviated Toolbar



The **Left Arrow** < and **Right Arrow** > icons on either side of the document hide or reveal the **Menu** (right) and side Toolbar (left).

Figure 77: Adobe Acrobat Reader Toolbars and Menu



7.2.4.1 Document Viewer Controls



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

The **Arrow** icon on the right side of the upper Toolbar 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 78: 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 upper Toolbar to reveal the drop-down menu. Select **Undock Page Controls** to release and display a mobile Toolbar with various **Page Control** functions that appears at the bottom of the screen. The **Toolbar** disappears when other activities are performed; hover the cursor at the bottom of the screen, and it reappears. Redock the **Page Controls** by clicking the **Dot and Up Arrow**  icon on the far right side of the mobile Toolbar.



Zoom in or out using the Plus  or Minus  icons on the mobile **Toolbar**.
Set the **Zoom** to a specific percentage using the **Down Arrow Box**.

Figure 79: 3-Dots Icon to Undock the Page Controls

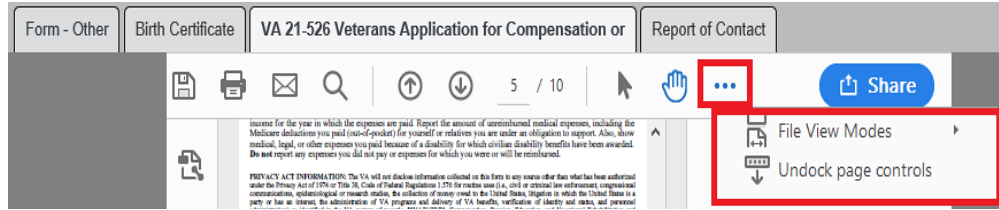
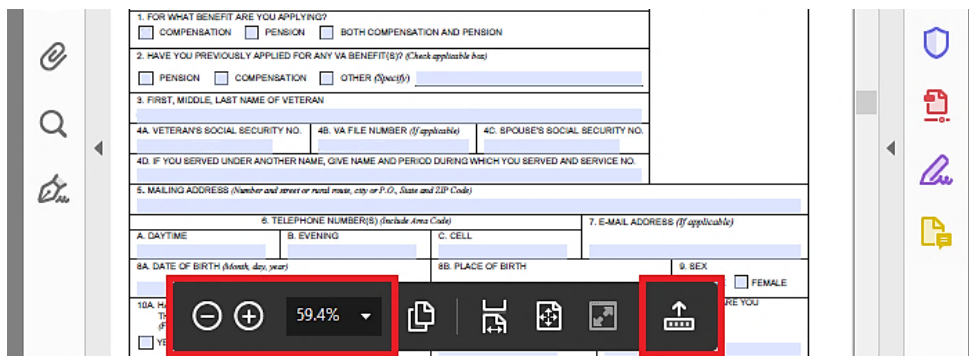


Figure 80: Undock Page Controls Mobile Toolbar



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




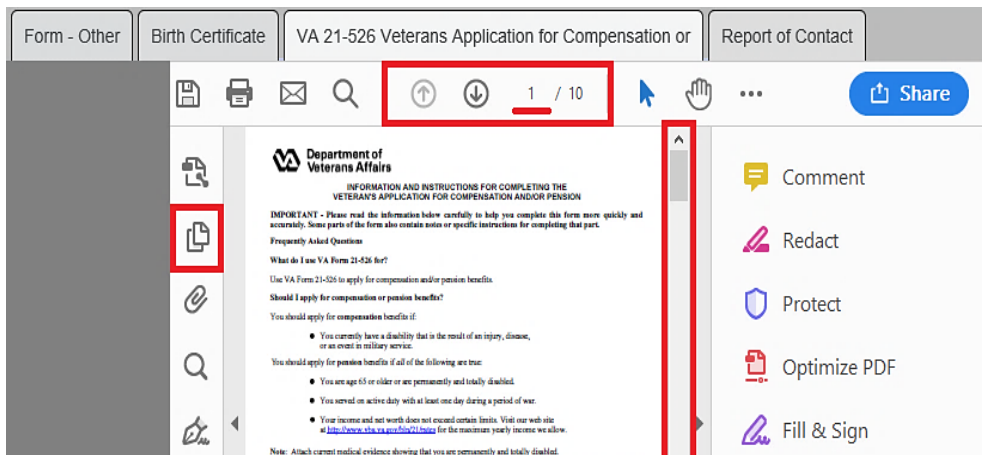
- Use the **Next Page Arrow**  and **Previous Page Arrow**  icons on the upper **Toolbar**.
- Enter a specific page number in the **Page Number** field on the right side of the **Page Arrows** and press the **Enter** key on the keyboard.
- Use the **Vertical Scroll Bar** on the right side of the document.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

Figure 81: 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 performs various **Actions** or **Tasks** on the selected packet(s) at the packet level (not the document level). Packet **Actions** change **Packet Status** ([Section 6.4](#)), whereas **Tasks** are functions that do not.

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 **Actions** or **Tasks**, 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 82: Packet Actions Task Bar Example – Queues and Search Tabs



Figure 83: Packet Actions Task Bar Example – Packet Detail Screen



7.3.1 Approve Button

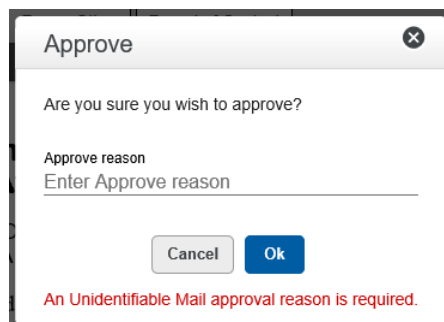
The **Approve**  button permits a request initiated by another User, such as:

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

An **Approval Reason** is required in the **Approve** window for the **UM First** and **Final Authorization Queues**. The **Approval Reason** (up to **500** characters) is retained as a **Packet Notes** entry, which is not editable. An **Error** message appears if the **Approval Reason** is omitted.

The **OK** button confirms the approval, while the **Cancel** button or the **X** icon stops the action and exits the window.

Figure 84: Approve Window



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

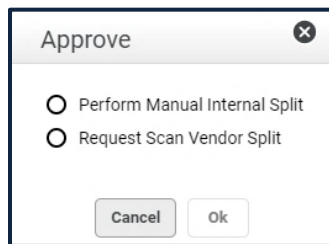
- Authorization
- COR Authorization
- UM First Authorization
- UM Final Authorization

Super Users and **Supervisors** can **Approve** packets that are in the **Authorization Queue** with a **Packet Status** of **Split Pending**. Review the **Packet Notes** before proceeding with the **Approve** action to determine if a previous **Split** request for the packet was rejected by a conversion **Vendor**.

Select the desired **Split** method (internal manual separation or conversion **Vendor** reprocessing) in the **Approve** window. A conversion **Vendor** performs the **Split** if the packet contains only one (1) document; **Scan Vendor Split** is the default **Split** method.

The **OK** button confirms the approval, while the **Cancel** button or the **X** icon stops the action and exits the window.

Figure 85: Split Pending Approve Window



The **Packet Status** changes to **Split Confirmed** after the **Approve** action is complete for the chosen **Split** method:

- **Manual Internal Split** – Refer to [Section 7.5](#) for additional instructions to complete the **Split** process.
- **Scan Vendor Split** – The packet returns to a conversion **Vendor** for separation.

Once separation finalizes, the original packet is marked **Complete** and removed from the workflow. The system adds **Packet Notes** to the original packet and each new packet created from the **Split** request to establish a historical relationship. The annotation lists the conversion **Vendor** that created the original packet along with the affiliated **Packet Number(s)**.

Each new packet created from a **Manual Internal Split** retains the original **Packet Number** and appends a hyphen starting with the number one (1) in sequential order to indicate the packets resulting from the **Manual Internal Split** (e.g., 596358-1, 596358-2, and 596358-3).

Super Users and **Supervisors** can **Approve** packets that are in the **Authorization Queue** with a **Packet 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 moves to the **CM Complete Queue** marked as **Unidentifiable Mail (UM) Confirmed** and is removed from the workflow.

A **COR** can **Approve** packets that are in the **COR Authorization Queue** with a **Packet Status** of **Rescan Pending Final**. The **Packet Status** changes to **Rescan Confirmed** after the **Approve** action is complete. The packet returns to a conversion **Vendor** for reprocessing. An approved **Rescan** request rejected by the conversion **Vendor** is recorded in the **Packet Notes**.

Once reprocessing finalizes, the original packet is marked **Complete** and removed from the workflow. The system adds **Packet Notes** to the original packet and the new packet created by the conversion **Vendor** from the **Rescan** request to establish a historical relationship. The annotation lists the conversion **Vendor** that created the original packet along with the affiliated **Packet Number**.

7.3.2 Deny Button

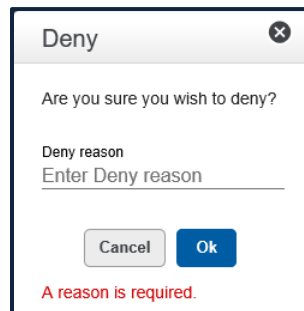
The **Deny**  button declines a request initiated by another User:

- Split a packet
- Rescan a packet
- Mark a packet as Unidentified Mail

A **Denial Reason** is required in the **Deny** window. The **Denial Reason** (up to **500** characters) is retained as a **Packet Notes** entry, which is not editable. An **Error** message appears if the **Denial Reason** is omitted.

The **OK** button completes the denial, while the **Cancel** button or the **X** icon stops the action and exits the window.

Figure 86: Deny Window



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

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

A **Deny** action in the **Authorization** or **UM First Authorization Queue** moves the packet back to the **Work Queue** of the **Assigned User**. If the **Assigned User** is no longer authorized, 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 **Assignment** or **Work Queue**.

Super Users and **Supervisors** can **Deny** packets in the **Authorization Queue** with a **Packet 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 **Packet Status** of **Rescan Pending**.

7.3.3 Return Button



The **Return** button restores a packet to its previous **Queue** (**Work**, **Hold**, or **Assignment**).

A **Return Reason** is required in the **Return** window. The **Return Reason** (up to **500** characters) is retained as a **Packet Notes** entry, which is not editable. An **Error** message appears if the **Return Reason** is omitted.

The **OK** button completes the return, while the **Cancel** button or the **X** icon stops the action and exits the window.

Figure 87: Return Window

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

- Hold
- Reassign


A **Return** action in the **Hold Queue** moves the packet back to the **Work Queue** of the **Assigned User**. If the **Assigned User** is no longer authorized, the packet is placed in the **Assignment Queue** at the **Location** where the packet resides.

A **Return** action in the **Reassign Queue** moves the packet back to the **Work**, **Hold**, or **Assignment Queue** of the **Assigned User**. If the **Assigned User** is no longer authorized, the packet is 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**.

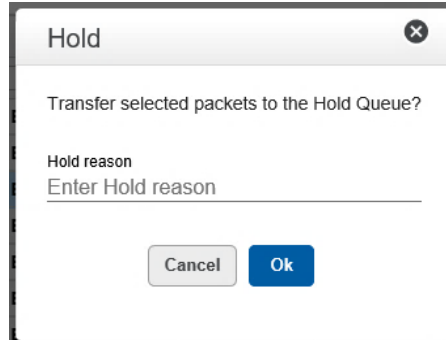
Super Users, **Supervisors**, and a **COR** can **Return** packets in the **Reassign Queue**.

7.3.4 Hold Button

The **Hold**  button temporarily postpones packet processing ([Section 4.9.1](#)) pending further investigation, information, and instructions. The **Hold Reason** (up to **500** characters) is retained as a **Packet Notes** entry, which is not editable.

The **OK** button transfers the packet to the **Hold Queue**, while the **Cancel** button or the **X** icon stops the action and exits the window.


Figure 88: Hold Window



The **Hold** action occurs in the **Work Queue** and transfers a packet to the **Hold Queue**.

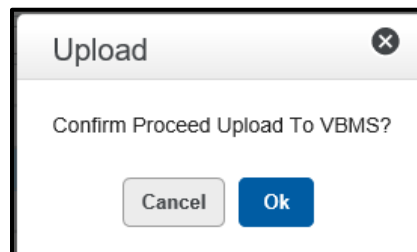
Basic Users, Super Users, Supervisors, and a **COR** can place a packet on **Hold**.

7.3.5 Upload to VBMS Button

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

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

Figure 89: Upload Window




The CM Portal attempts to upload the packet(s) to the VBMS, and the **Packet Status** is listed 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**.

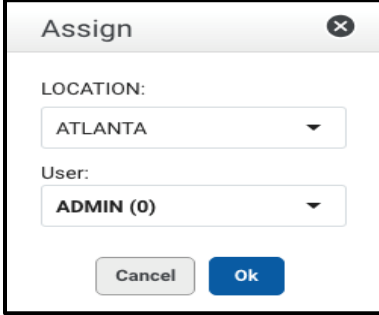
Super Users, Supervisors, and a **COR** can **Upload to VBMS** from any **Queue**.

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 or the **X** icon 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 90: Assign Window



The screenshot shows a window titled "Assign" with a close button (X) in the top right corner. Inside the window, there are two dropdown menus. The first is labeled "LOCATION:" and has "ATLANTA" selected. The second is labeled "User:" and has "ADMIN (0)" selected. At the bottom of the window, there are two buttons: "Cancel" and "Ok".


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 Reassign Button

The **Reassign**  button transfers a packet to another **Location** or **Line of Business (LOB)** for processing.

The first **Reassign** action occurs in the following **Queues**:

- Work
- Hold
- Assignment

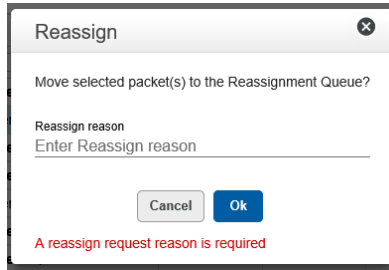
The packet initially moves from its current **Queue** to the **Reassign Queue** at the same **Location**.

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

A **Reassign Reason** is required in the **Reassign** window for the transfer request. The **Reassign Reason** (up to **500** characters) is retained as a **Packet Notes** entry, which is not editable. An **Error** message appears if the **Reassign Reason** is omitted.

The **OK** button transfers the packet to the **Reassign Queue**, while the **Cancel** button or the **X** icon stops the action and exits the window.

Figure 91: Initial Reassign Window



The second **Reassign** action occurs in the **Reassign Queue**.

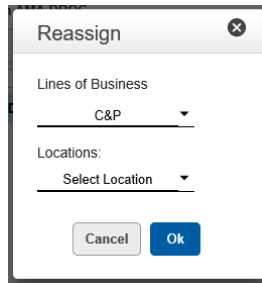
Super Users, Supervisors, and a **COR** can **Reassign** packets for processing.

Select one or more packets from the **Reassign Queue**. Multiple packets may be reassigned to any other single **LOB** and **Location** per transfer.

Choose a new **LOB** (if different from the default current **LOB**) and the associated processing **Location** in the **Reassign** window. **Location** options are specific to the **LOB** indicated.

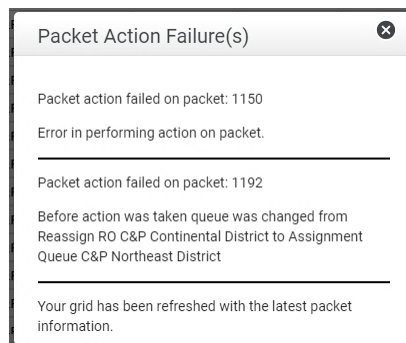
The **OK** button transfers the packet(s) to the **Assignment Queue** for the designated **LOB** and **Location**, while the **Cancel** button or the **X** icon stops the action and exits the window.

Figure 92: Final Reassign Window




The **Packet Action Failure(s)** window notifies when the **Reassign** action is unsuccessful for the packet(s) indicated. The **X** icon exits the window. Perform the **Reassign** action again for the specified packet(s).

Figure 93: Packet Action Failure(s) Window



7.3.8 Rescan Button

The **Rescan**  button initiates a request to have packet source material reprocessed by the conversion **Vendor** for improved quality.

Rescan requests are not permitted for packets that originate from certain **Sources (Packet Indexing)** or contain documents with specific **Document Origins (Document Indexing)**:

- Private Medical Record (**PMR**) Program
- Electronic Sources (e.g., fax, Direct Upload, or API)
- A previous Manual Internal Split (denoted by a hyphenated CM Packet Number)
- **Appended Documents**

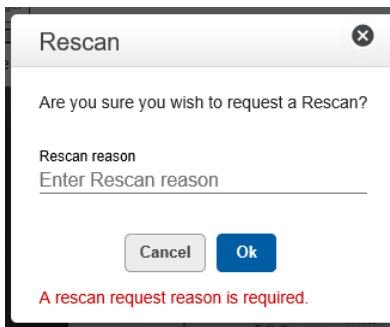
An **Error** message advises when the **Rescan** option is unavailable for a particular packet.

Only one (1) **Rescan** request may be submitted per packet, regardless of authorization approval or denial. An **Error** message informs when the **Rescan** option is unavailable due to a previous request. Review the **Packet History** ([Section 7.3.15](#)) for more information. An approved **Rescan** request rejected by the conversion **Vendor** is recorded in the **Packet Notes**.

A **Rescan Reason** is required in the **Rescan** window for the conversion **Vendor** reprocessing request. The **Rescan Reason** (up to **500** characters) is retained as a **Packet Notes** entry, which is not editable. An **Error** message appears if the **Rescan Reason** is omitted.

The **OK** button sends the packet for **Rescan** authorization, while the **Cancel** button or the **X** icon stops the action and exits the window.

Figure 94: Rescan Window



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

- Work
- Hold
- Assignment

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


Once the **Rescan** request is submitted, the **Packet Status** changes to **Rescan Pending**. The packet moves to the **Authorization Queue** for initial approval by an authorized **User**.

The **Packet Status** changes to **Rescan Pending Final** after the initial Approve action is complete and moves to the **COR Authorization Queue**.

The **Packet Status** changes to **Rescan Confirmed** after the **final Approve** action is complete in the **COR Authorization Queue**. The packet returns to a conversion **Vendor** for reprocessing.

When reprocessing finalizes, the original packet is marked **Complete** and removed from the workflow. The system adds **Packet Notes** to the original packet and the new packet created by the conversion **Vendor** from the **Rescan** request to establish a historical relationship. The annotation lists the conversion **Vendor** that created the original packet along with the affiliated **Packet Number**.

7.3.9 Split Button

The **Split**  button signals that a single packet requires separation into multiple packets by a conversion **Vendor** or through an internal manual process. A **Split** usually occurs when a packet contains documents and information for multiple Veterans, claim/benefit types, and **Lines of Business**.

Split requests are not permitted for packets that originate from certain **Sources (Packet Indexing)** or contain documents with specific **Document Origins (Document Indexing)**:

- Private Medical Record (**PMR**) Program
- Fugitive Felon Status (**FFS**) situations
- A previous Manual Internal Split (denoted by a hyphenated CM Packet Number)
- **Appended Documents**

An **Error** message advises when the **Split** option is unavailable for a particular packet.

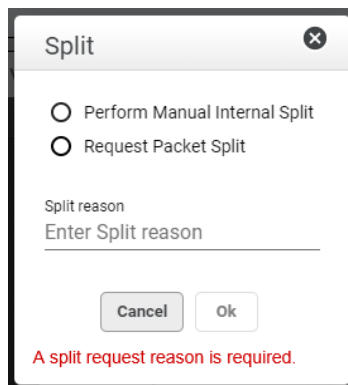
Review the **Packet Notes** before proceeding with the **Split** action to determine if a previous Split request for the packet was rejected by a conversion **Vendor**.

Select the desired **Split** method (internal manual separation or conversion **Vendor** reprocessing) in the **Split** window. A conversion **Vendor** performs the **Split** if the packet contains only one (**1**) document; **Request Packet Split** is the default **Split** method.

A **Split Reason** is required for the separation request. The **Split Reason** (up to **500** characters) is retained as a **Packet Notes** entry, which is not editable. An **Error** message appears if the **Split Reason** is omitted.

The **OK** button confirms the **Split** request, while the **Cancel** button or the **X** icon stops the action and exits the window.

Figure 95: Split Window



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



- Work
- Hold
- Assignment

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

Refer to [Section 7.5](#) for additional instructions to complete the **Manual Internal Split** process. The new **Split** packets are marked **Processing** and moved to the **Assignment Queue** (if original packet was unassigned at **Split** request initiation) or back to the **Work Queue** of the same **Assigned User** before the **Split** request.

Once the **Packet Split Request** is submitted, the **Packet Status** changes to **Split Pending**, and the packet moves to the **Authorization Queue**. The **Packet Status** changes to **Split Confirmed** after the **Approve** action is complete in the **Authorization Queue**. The packet returns to a conversion **Vendor** for separation or undergoes a **Manual Internal Split** in the CM Portal.


When separation finalizes, the original packet is marked **Complete** and removed from the workflow. The system adds **Packet Notes** to the original packet and each new packet created from the **Split** request to establish a historical relationship. The annotation lists the conversion **Vendor** that created the original packet along with the affiliated **Packet Number(s)**.

The **Split Type** column in the **CM Packet Results Grid** ([Section 6.2](#)) displays **Original**  and **New**  **Split** packet icons to identify packets associated with a **Split** (internal manual separation or conversion **Vendor** reprocessing). The **Split Type** column is symbolic and is not included in the **Search Criteria** or the **Export** option.

Each new packet created from a **Manual Internal Split** retains the original **Packet Number** and appends a hyphen starting with the number one (1) in sequential order to indicate the packets resulting from the **Manual Internal Split** (e.g., 596358-1, 596358-2, and 596358-3).

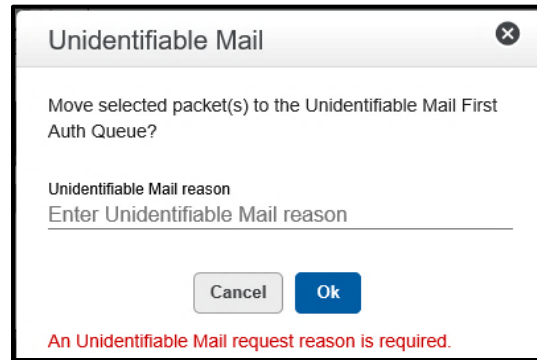
Locate the packets created from a **Manual Internal Split** using the **Search Tab** ([Section 6.3](#)). Enter the original **Packet Number** followed by a hyphen and the **Wildcard** character * (no spaces before or after) in the **CM Packet Number** field (e.g., 596358-*). Click the **Search** button to view all results matching the designated **Packet Number**.

7.3.10 Unidentifiable Button

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

An **Unidentifiable Mail Reason** is required in the **Unidentifiable Mail** window for the designation request. The **Unidentifiable Mail Reason** (up to **500** characters) is retained as a **Packet Notes** entry, which is not editable. An **Error** message appears if the **Unidentifiable Mail Reason** is omitted.

The **OK** button sends the packet for **Unidentifiable Mail (UM)** authorization, while the **Cancel** button or the **X** icon stops the action and exits the window.

Figure 96: Unidentifiable Mail Window


Unidentifiable Mail

Move selected packet(s) to the Unidentifiable Mail First Auth Queue?

Unidentifiable Mail reason
Enter Unidentifiable Mail reason

Cancel Ok

An Unidentifiable Mail request reason is required.

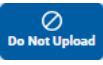
The **Unidentifiable** action occurs on the **Packet Detail** screen in the following **Queues**:

- Work
- Hold
- Assignment

Once the **Unidentifiable Mail** request is submitted, the **Packet Status** changes to **Unidentifiable Mail (UM) Pending**, and the packet moves to the **UM First Authorization Queue**.

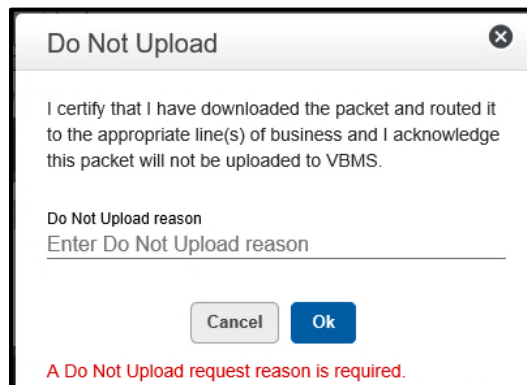
Basic Users, Super Users, Supervisors, and a **COR** can request that a packet is marked as **Unidentifiable**.

7.3.11 Do Not Upload Button

The **Do Not Upload**  button terminates packet transmission to the VBMS.

A **Do Not Upload Reason** is required in the **Do Not Upload** window for the cessation request. The **Do Not Upload Reason** (up to **500** characters) is retained as a **Packet Notes** entry, which is not editable. An **Error** message appears if the **Do Not Upload Reason** is omitted.

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

Figure 97: Do Not Upload Window


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 to VBMS.

Do Not Upload reason
Enter Do Not Upload reason

Cancel Ok

A Do Not Upload request reason is required.


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

- Work
- Hold
- Assignment

The **Do Not Upload** action removes the packet from the workflow; no further processing is conducted. The packet moves to the **CM Complete Queue** marked as **Download Confirmed**.

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

7.3.12 Append Button

The **Append**  button attaches Portable Document Format (**PDF**) files of Master Category List (MCL) documents providing additional information and evidence to packets at designated Locations.

Verify packet accuracy and quality before proceeding with the **Append** action. **Split** ([Section 7.3.9](#)) and **Rescan** ([Section 7.3.8](#)) requests are not permitted for packets containing **Appended Documents**. Submit a **Split** or **Rescan** request for separation or reprocessing (if necessary), and perform the **Append** action on the new packet(s).

All **Append Documents** files should contain a specific MCL **Document/Form Type** and must conform to the following criteria:

- Valid **PDF** file with a **.pdf** file extension type
- **PDF** Versions **1.3** and later
- Maximum document file size of **100** megabytes (**MB**) – No empty files
- No encryption or password protection
- Free of malware (e.g., virus, worm, or Trojan)

There are two (**2**) methods to submit one (**1**) or more **Appended Documents**:

- Click the **Browse** button to activate the **Open** pop-up window. Select the appropriate document or multiple documents (hold the **Ctrl** key down on the keyboard while clicking the left mouse button on each chosen highlighted document). Click the **Open** button to initiate file transmission.
- Drag one (**1**) file or multiple files from the computer desktop or designated folder in **File Explorer** and release in the **Drop Files Here** box.

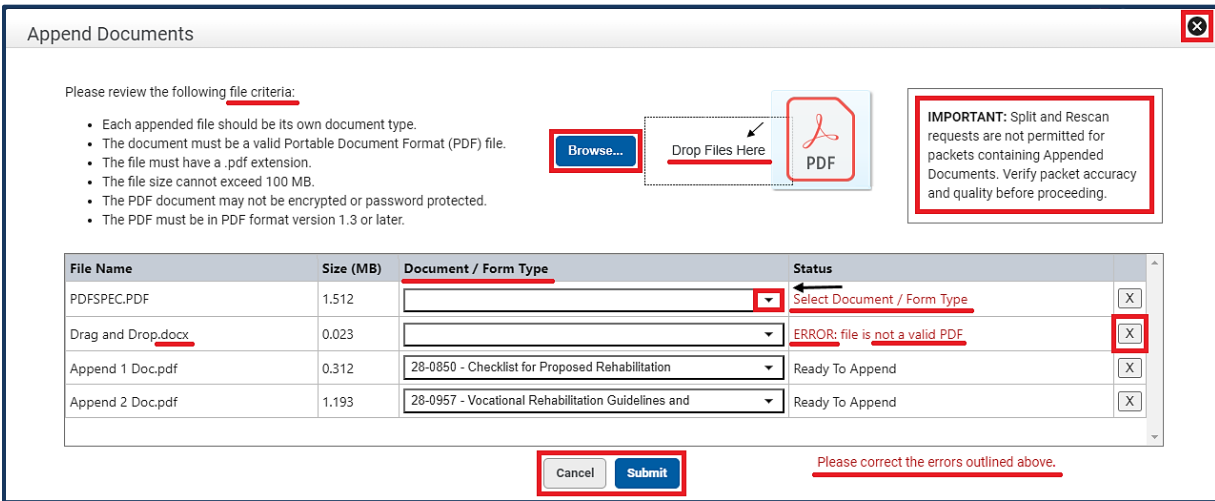
All attached files appear in the **File Name** listing. Confirm there are no missing documents.

Select an MCL **Document/Form Type** for each file. Fields with **Down Arrows** have an **options menu**. Filter the options menu by typing part of the **Document/Form Type** name to reduce the choices or scroll through the entire list. Text is not case-sensitive.

An **Error** message appears if the **PDF** file or **Document/Form Type** is invalid or omitted. Correct or complete the **Error(s)** indicated in the **Status** field. Remove files by clicking the **X** icon (**Delete document**) on the right side of the **Status** field.

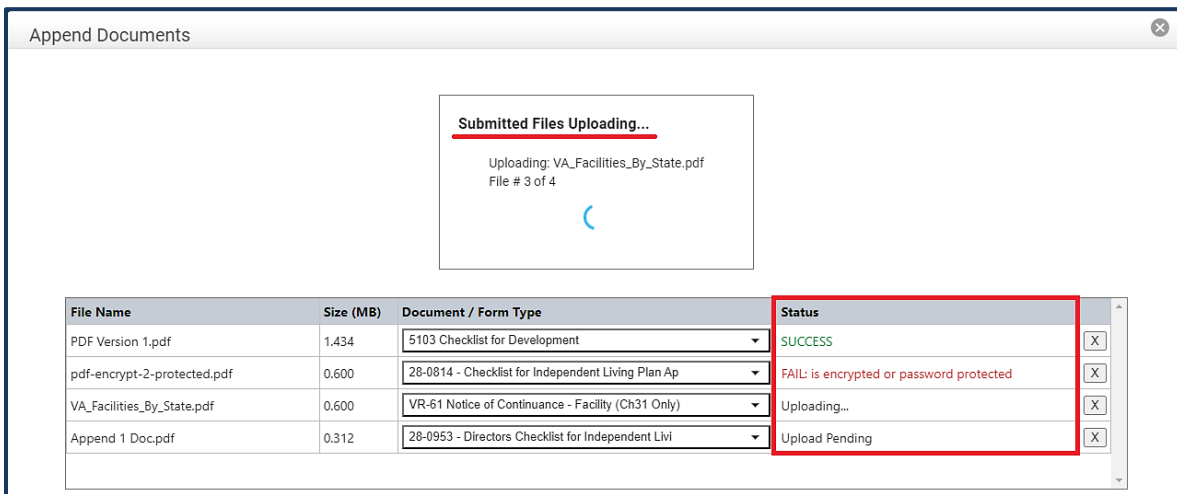
The **Submit** button initiates **Append Documents** upload when all files attain **Ready to Append Status**, while the **Cancel** button or the **X** icon (upper right corner of the window) terminates the process and exits the window.

Figure 98: Append Documents Window



The **Submitted Files Uploading** box at the top of the **Append Documents** window displays file transmission progress. The **Status** field lists the final validation and upload result for each file.

Figure 99: Append Documents Submitted Files Uploading Box and Status



Only files with **SUCCESS Status** after **Submitted Files Uploading – PROCESSING COMPLETE** are added to the packet through the **Append Documents** process.

The **Close** button or the **X** icon (upper right corner of the window) exits the **Append Documents** window and returns to the **Packet Detail** screen.

The **new Appended Documents** are located at the **end** of the **Document List** (left side of the screen) and **Document List Tabs** (far right side above the **Document Viewer**), which are denoted by the **Append Button Plus Sign** (+) icon on the right side of the tab (Section 7.2.1).

Appended Documents are recorded in the **Document History** (Section 7.3.15).

Modify all files with **FAIL Status** to conform to the specified file criteria in the **Append Documents** window, and resubmit the **Append Documents** upload for those files.

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


- Work
- Hold

Basic Users, Super Users, and Supervisors (Assigned User and superiors) at the same designated Location and a **COR** can **Append** unlimited documents to eligible packets as necessary.

PDF files with the same File Name cannot be submitted together during an **Append Documents** upload; however, a file with the same File Name as a previously **Submitted File** can be uploaded during a subsequent **Append** action for the same packet.

Contact the **CM Portal Help Desk** ([Section 1.3](#)) to remove Appended Documents from a packet.

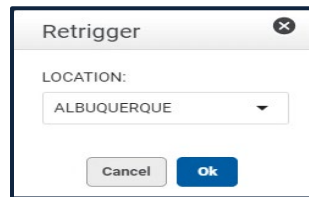
7.3.13 Retrigger Button

The **Retrigger**  button (accessed only by a **COR**) initiates another round of workflow processing on **Complete** packets, which are outside of the standard **Queues**. The **Retrigger** action occurs on the **Search Tab** or **Packet Detail** screen.

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

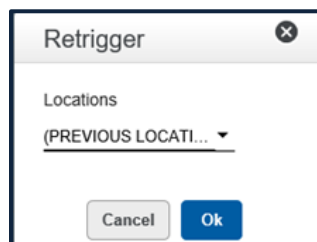
- When one (1) packet is selected, the **Location** field defaults to the last Location where the **Packet Status** became **Complete**.

Figure 100: 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 101: 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 or the **X** icon stops the action and exits the window.

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

7.3.14 Download Button

The **Download**  button transmits a copy of the selected packet(s) in a compressed (zipped) file folder (.zip) to your computer. **All Users** may perform this **Task** in any Queue.

7.3.15 History Button

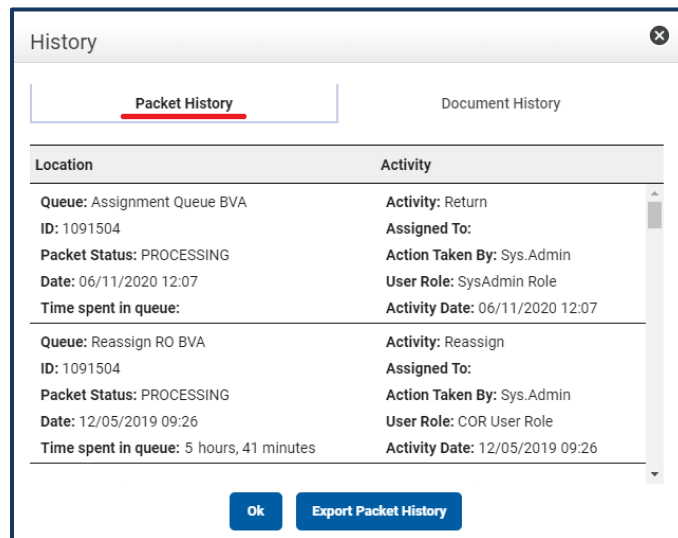
The **History**  button shows the entire record of activity and information for the packet at the packet and document levels in the **History** window. **All Users** may perform this **Task** in any Queue.

The **Packet History Tab** is located on the left side of the **History** window. The **OK** button or the **X** icon exits the window.

The **Time Spent in Queue** value is expressed in years, months, days, hours, and minutes.

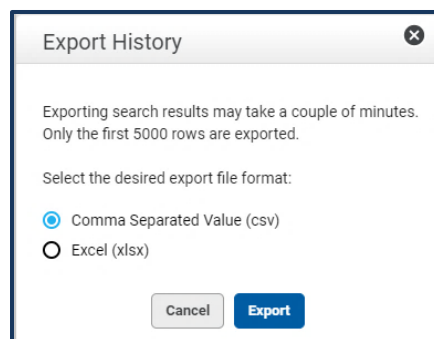
The **Export Packet History** option creates a comma-separated value (CSV) or Microsoft Excel file to download **History** data into a spreadsheet format.

Figure 102: History Window – Packet History Tab



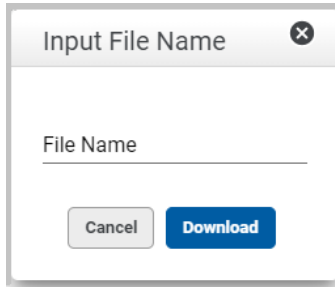
Click the **Export Packet History** button to activate the **Export History** window. Select the desired export file format.

Figure 103: Export History Window



The **Cancel** button or the **X** icon terminates the export process and exits the window. The **Export** button opens the **Input File Name** window.

Figure 104: Input File Name Window



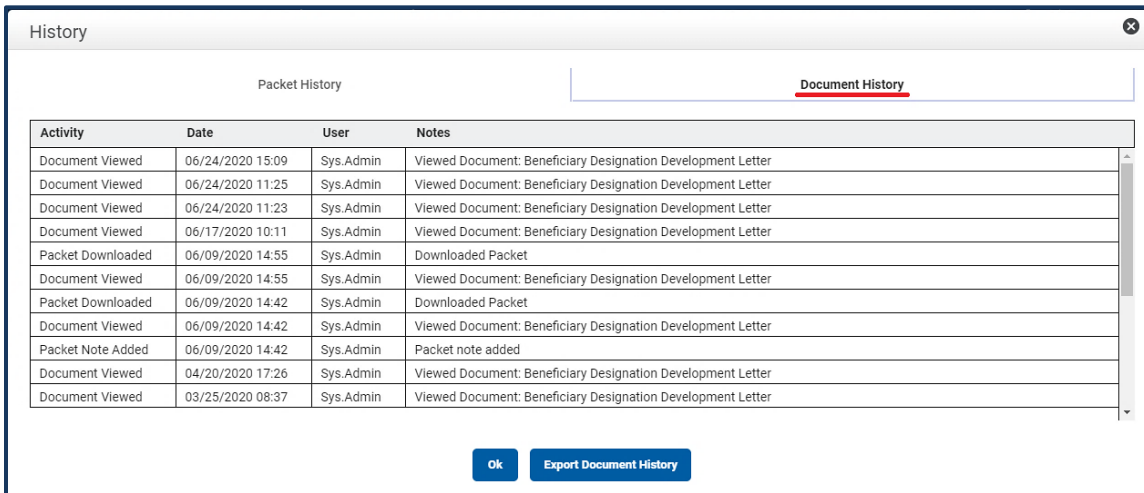
The **Cancel** button or the **X** icon stops the action and returns to the **Export History** window. Click the **Cancel** button or the **X** icon there to terminate the export process.

Enter a **File Name** that does not contain leading spaces, ending spaces, or certain special characters. An **Error** message appears if the **File Name** is invalid or omitted.

The **Download** button initiates the **Export** process. The **Export** file includes all **Packet History** information for the newest **5000** records, starting with the most recent. Date and time values are noted in Central Time (**CT**).

The **Document History Tab** is located on the right side of the **History** window. The **OK** button or the **X** icon exits the window.

Figure 105: History Window – Document History Tab




The **Export Document History** option creates a comma-separated value (CSV) or Microsoft Excel file to download **History** data into a spreadsheet format.

Click the **Export Document History** button to activate the **Export History** window. The process instructions are the same as **Export Packet History** addressed previously.

The **Export** file includes all **Document History** information for the newest **5000** records, starting with the most recent. Date and time values are noted in Central Time (**CT**).

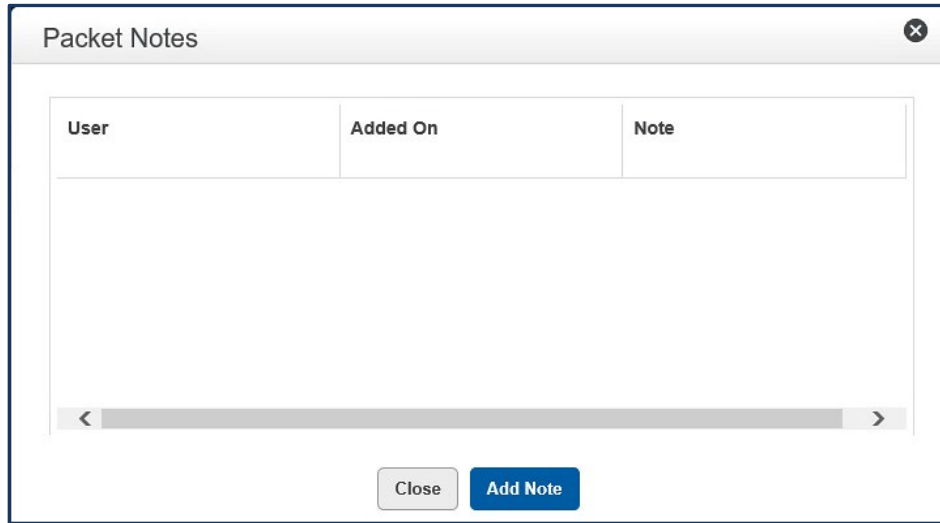
7.3.16 Notes Button

The **Notes**  button enables making or viewing annotations about the packet. If the packet has notes, the **Notes** button appears with text lines (like the graphic above). If there are no comments, the **Notes**

 button displays an empty page. All Users may perform this **Task** in any Queue.

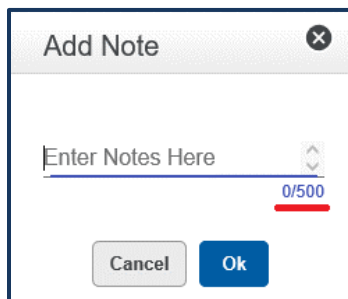
The **Packet Notes** window lists basic information about the notes. Click the **Add Note** button to make an entry. The **Close** button or the **X** icon exits the window.

Figure 106: Packet Notes Window




Enter up to **500** characters per note (tracked below the entry field) in the **Add Note** window. Notes are not editable after clicking the **OK** button. The **OK** button confirms the entry, while the **Cancel** button or the **X** icon stops the action and exits the window.

Figure 107: Add Note Window

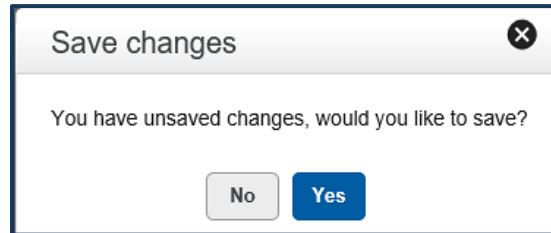


7.3.17 Close Button


The **Close**  button exits the **Packet Detail** screen and returns to the **Results Grid** on the **Queues** or **Search Tab**. All Users may perform this **Task** 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. The **X** icon in the upper right corner of the **Save Changes** window returns to the **Packet Detail** screen.

Figure 108: Save Changes Window



7.3.18 Mark Unread Button

The **Mark Unread**  button changes the **Packet Phase** ([Section 6.2.2.9](#)) for the selected row from opened (normal style text) to unopened (**bold** text). This button is only available for the **Results Grid** on the **Queues Tab**. All Users may perform this **Task** in any Queue.

7.4 Automatic Workflow Mode

Automatic Workflow Mode opens all packets (oldest Portal Entry Date first) for the selected **Level/Location/Queue** on the **Packet Detail** screen. After an **Action** is complete on each packet, the next oldest packet automatically displays for processing. **Automatic Workflow Mode** continues until all packets are processed.

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

The **Close** button exits **Automatic Workflow Mode** and returns to the **Results Grid** on the **Queues Tab**.

7.4.1 Automatic Workflow Mode Only

Automatic Workflow Mode Only limits Users to **Automatic Workflow Mode** when processing packets in the **Work Queue** at select Locations.

A **COR** must designate the following **User Role Permission** for a **User Role** and Location accessibility setting for a specific Location to activate **Automatic Workflow Mode Only** in the **Work Queue** for that User Role at that Location:

- **User Role Menu Item Permission – Automatic Workflow Only Mode**
- **Location** accessibility setting – **Automatic Workflow Mode Only**

7.5 Manual Internal Split

A single packet requires separation into multiple packets via a **Manual Internal Split** when the packet contains documents and information for multiple Veterans, claim/benefit types, and **Lines of Business**.

Basic Users can perform a **Manual Internal Split** on packets in the **Work** and **Hold Queues**.

Super Users, Supervisors, and a **COR** can perform a **Manual Internal Split** on packets in the **Work, Hold, Assignment,** and **Authorization Queues**.

Figure 109: Manual Internal Split Window

The screenshot shows the 'Manual Internal Split' window. On the left, there is a 'Documents (38)' table with columns for 'Document Name', 'Pages', and 'In Packet(s)'. Below it is the 'Manual Internal Split Packets' section, which includes a 'New Packet' button and a 'Packet 1' section. The 'Packet 1' section has a 'Veteran Info' table and a 'Documents' table. The 'Veteran Info' table includes fields for First Name, Middle Initial, Last Name, File Number, and EMERG. The 'Documents' table lists documents with 'Add Selected Document' and 'Delete document from packet' buttons. On the right, the 'Document Viewer' displays a form titled 'Department of Veterans Affairs APPLICATION FOR BENEFITS FOR A QUALIFYING VETERAN'S CHILD BORN WITH DISABILITIES'. The form includes sections for 'SECTION I: CHILD'S IDENTIFICATION INFORMATION' and 'SECTION II: RELATIONSHIP WITH PARENTS'.

Document Name	Pages	In Packet(s)
VA 21-0304 Application for Spina Bifida Benefits	1	1
VA 21-0779 Request for Nursing Home Info In Connec	1	1

Veteran Info:	Documents:
First Name: Testla	VA 21-0304 Application for Spina Bifida Benefits
Middle Initial:	VA 21-0779 Request for Nursing Home Info In Connec
Last Name: McTest	VA 21-0781. Statement in Support of Claim for PTSD
File Number: 25998998	VA 21-0781a. Statement in Support of Claim for PTS
EMERG: Select Emergent Flashes	

The **Documents** section on the upper left side of the **Manual Internal Split** window lists all documents (indicated by the total number in parenthesis) contained in the original packet being separated, the number of pages per document, and the packets created from the **Split** (Packet 1, Packet 2, etc.) in which those documents are included.

The first document on the **Documents** list displays by default in the **Document Viewer** on the right side of the window. Use the **Vertical Scroll Bar** on the right side of the **Documents** section to access the other documents on the **Documents** list. Click on any row in the **Documents** list to select (highlighted in blue) and view another document. The **Document Viewer** displays the selected document using **Adobe Acrobat Reader** software.

Packet 1 (first **Split** packet) is created automatically in the **Manual Internal Split Packets** section and contains all the **Veteran Information** and **Documents** from the original packet. Edit the **Veteran Information** for **Packet 1** if necessary. The **Middle Initial** and **EMERG (Emergent Flashes)** fields are optional. All other fields are required. Select and delete the entire field entry or incorrect letter(s) and number(s) using the mouse and keyboard. Enter the correct information. Text is case-sensitive.

Click the **Down Arrow** on the **EMERG** field to designate an emergent situation for the claim. Select one (1) or more categories from the **options menu** by marking or clearing the checkbox. The **Emergent Flashes** (emergent situations) appear in the **EMERG** field. Click anywhere on the right side of the menu to close it. The **X** icon deletes the **EMERG** field entry.

Remove unrelated **Documents** from **Packet 1** by clicking the **X** icon (**Delete document from packet**) on the right side of the **Document Name** field. If a document is deleted accidentally, select the document (highlighted in blue) in the **Documents** section at the top of the window and click the **Add Selected Document** for **Packet 1** to return the document to the packet.

Click the **New Packet** button on the right side of **Manual Internal Split Packets** above **Packet 1** to create **Packet 2**. The **Split** must produce a minimum of two (2) packets. Use the **Vertical Scroll Bar** on the right side of the **Packet 1** partition to access the new **Split** packet(s).

Enter **Veteran Information** for **Packet 2**:

- **First Name** – Letters A–Z (including spaces and hyphens) with a **50**-character maximum limit
- **Middle Initial** (optional) – one (1) Letter
- **Last Name** – Letters A–Z (including spaces and hyphens) with a **50**-character maximum limit
- **(Veteran) File Number** – Numerical (**0–9**) values only – Eight (**8**) or nine (**9**) digits required
- **EMERG** (optional) – one (1) or more **Emergent Flashes** if applicable

The **Middle Initial** and **EMERG** fields are optional. All other fields are required. Select and delete the entire field entry or incorrect letter(s) and number(s) using the mouse and keyboard. Enter the correct information. Text is case-sensitive.

Assign **Documents** by selecting the document (highlighted in blue) in the **Documents** section at the top of the window and clicking the **Add Selected Document** button for **Packet 2**. At a minimum, one (1) document must be added from the **Documents** section. Any document can be assigned to multiple packets, which is noted in the **In Packet(s)** column in the **Documents** section.

Remove **Documents** from **Packet 2** by clicking the **X** icon (**Delete document from packet**) on the right side of the **Document Name** field. If a document is deleted accidentally, select the document (highlighted in blue) in the **Documents** section at the top of the window and click the **Add Selected Document** button for **Packet 2** to return the document to the packet.

Click the **New Packet** button on the right side of **Manual Internal Split Packets** to create additional packets. Each new packet must contain at least one (1) document from the **Documents** section.

Every document in the **Documents** section at the top of the window must be assigned to at least one (1) packet. Any document can be assigned to multiple packets, which is noted in the **In Packet(s)** column.

The **X** icon (**Delete packet from internal split**) in the upper right corner of each **Packet** partition removes the packet from the **Manual Internal Split**. Create a **New Packet** if a packet is deleted accidentally.

Figure 110: Delete Packet from Manual Internal Split

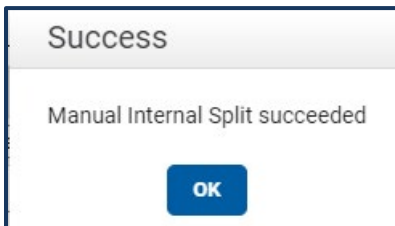


The **Split** button finalizes the **Manual Internal Split** and establishes the new **Split** packets in the system, while the **Cancel** button or the **X** icon (upper right corner of the window) terminates the process and exits the window.



An **Error** message appears if the field entries are invalid or omitted or the packet is no longer in an eligible **Packet Status**.

Click the **OK** button in the **Success** window to acknowledge the **Split** completion and exit the window.

Figure 111: Manual Internal Split Success Window



When separation finalizes, the system adds **Packet Notes** to the original packet and each new packet created from the **Split** request to establish a historical relationship. The annotation lists the conversion **Vendor** that created the original packet along with the affiliated **Packet Number(s)**.

The **Split Type** column in the **CM Packet Results Grid** ([Section 6.2](#)) displays **Original**  and **New Split**  packet icons to identify packets associated with a **Split** (internal manual separation or conversion **Vendor** reprocessing). The **Split Type** column is symbolic and is not included in the **Search Criteria** or the **Export** option.

Each new packet created from a **Manual Internal Split** retains the original **Packet Number** and appends a hyphen starting with the number one (1) in sequential order to indicate the packets resulting from the **Manual Internal Split** (e.g., 596358-1, 596358-2, and 596358-3).

Locate the packets created from a **Manual Internal Split** using the **Search Tab** ([Section 6.3](#)). Enter the original **Packet Number** followed by a hyphen and the **Wildcard** character * (no spaces before or after) in the **CM Packet Number** field (e.g., 596358-*). Click the **Search** button to view all results matching the designated **Packet Number**.

When the **Manual Internal Split** action finalizes, the original packet is marked **Complete** and removed from the workflow. The new **Split** packets are marked **Processing** and moved to the **Assignment Queue** (if original packet was unassigned at **Split** request initiation) or back to the **Work Queue** of the same **Assigned User** before the **Split** request.

Contact the **CM Portal Help Desk** ([Section 1.3](#)) to cancel a completed **Manual Internal Split**.

8 Admin Application

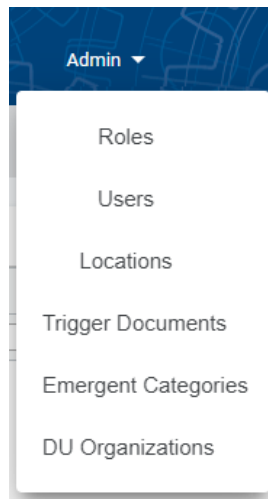
A COR with **Admin** (Administration) permission can add, modify, and disable or delete **User Roles**, **User** accounts, and **Locations** in the **Queue Hierarchy**. The **Admin** option is on the right side of the **Application Toolbar** at the top of the screen.

Figure 112: CM Portal Application Toolbar – Admin Option



The drop-down menu offers six (6) options: **Roles**, **Users**, **Locations**, **Trigger Documents**, **Emergent Categories**, and **DU Organizations**.

Figure 113: Admin Drop-down Options Menu

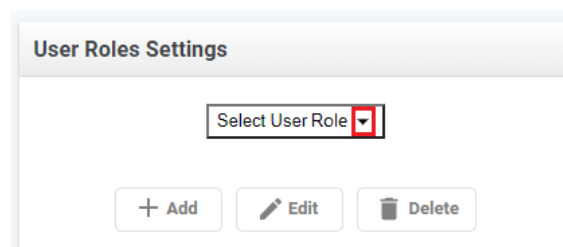


8.1 Roles

The **Roles** option adds or changes the **Queue** and **Menu Permissions** and **Location Access** level for new or existing **User Roles** ([Section 4](#)). **User Roles** are modified solely by the **System Administrator** under the direction of a **COR**. Contact the **CM Portal** management team for **User Role** customization.

Select an existing **User Role** in the **User Roles Settings** window on the left side of the screen to view the **Role Name**, **Role Description**, **Location Access**, and **Queue Type** and **Menu Item Permissions** addressed in Section 8.1.1. Fields shown in gray text are not editable.

Figure 114: User Roles Settings Window



8.1.1 Add a User Role

User Roles are modified solely by the **System Administrator** under the direction of a **COR**. Contact the **CM Portal** management team for **User Role** customization.

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

Figure 115: Create New User Role Window

The **Save** button establishes the **New User Role**, while the **Cancel** button or the **X** icon stops the action and exits the window. After saving the **New User Role**, click the **OK** button to select the appropriate **Queue** and **Menu Item Permissions**.

Figure 116: User Permissions Selection Reminder Window

Select one (1) or more categories from the options menus by marking the checkboxes in the **Queue Type** and **Menu Item Permissions** sections.

Figure 117: User Roles Settings Permissions

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

Permissions	Menu Items
<input checked="" type="checkbox"/>	Workflow/Packets View
<input type="checkbox"/>	Read Only Access
OR	Automatic Workflow Only Mode
AND/OR	Automatic Packet Assignment
<input checked="" type="checkbox"/>	Direct Upload View
OR	DU Self Submissions Only
<input type="checkbox"/>	DU Family Member Submissions
<input 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** ([Section 4.9](#)).

Packet Actions Task Bar buttons vary depending on the screen, number of rows chosen, **User Role**, **Queue** ([Section 4.9](#)), and current state of the packet (completed versus in progress).

The **Workflow/Packets View Menu Item Permission** enables **VA User Roles** to perform **CM** functions that process a packet through final disposition (Sections [6–7](#)) for the chosen **Queue Type Permissions**. All standard **VA User Roles** ([Section 4](#)) must assign the **Workflow/Packets View** permission. The **Workflow/Packets View** permission may be combined with other **Menu Item Permissions**.

Select the **Read Only Access Menu Item Permission** to restrict all **CM** functions except the **Task** buttons: **View Packet**, **Download**, **Export**, **History**, **Notes**, **Close**, and **Mark Unread**. This permission only activates when marked together with the **Workflow/Packets View** permission.

Select the **Automatic Workflow Only Mode Menu Item Permission** to establish **Automatic Workflow Mode Only** ([Section 7.4.1](#)) processing solely in the **Work Queue** at designated **Locations**. This permission only activates when marked together with the **Workflow/Packets View** permission and combined with the **Location** accessibility setting for **Automatic Workflow Mode Only** at a specific **Location** ([Section 8.3](#)).

Select the **Automatic Packet Assignment Menu Item Permission** to establish **Automatic Packet Assignment** ([Section 4.9.2](#)) solely in the **Work Queue** at designated **Locations**. This permission only activates when marked together with the **Workflow/Packets View** permission and combined with the **Location** accessibility setting for **Automatic Packet Assignment** at a specific **Location** ([Section 8.3](#)). In the **Create New User Role** window at the beginning of this section, mark the **Location Access** setting for **Role has access to no Locations** (Locations are assigned to Users in the “Admin – Users” module.).

Read Only Access cannot be assigned with **Automatic Workflow Only Mode** or **Automatic Packet Assignment**. Select either the **Read Only Access** option or the **Automatic** option(s) plus the **Workflow/Packets View** permission. **Automatic Workflow Only Mode** and **Automatic Packet Assignment** permissions may be assigned together.

The **Workflow/Packets View Menu Item Permission** marked together with the **Direct Upload View** permission authorizes **VA User Roles** to perform **CM** functions and submit Veteran benefit claim documents through **Direct Upload** at designated **Locations**.

The **Direct Upload View Menu Item Permission** alone allows DU document submissions by a **VA Business Partner** or an accredited **VSO**.

The **DU Self Submissions Only Menu Item Permission** allows DU document submissions solely by the assigned **User** for their personal **Veteran File Number**. This permission only activates when marked together with the **Direct Upload View** permission.

The **DU Family Member Submissions Menu Item Permission** allows DU document submissions by the assigned **User** for multiple **Veteran File Numbers** (including their own). This permission only activates when marked together with the **Direct Upload View** permission.

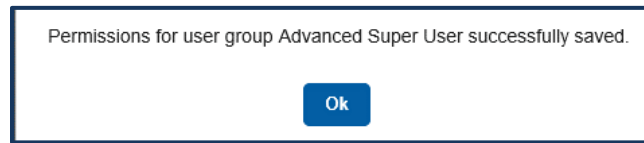
DU Self Submissions Only and **DU Family Member Submissions** cannot be assigned together. Select one (1) option plus the **Direct Upload View** permission.

The **Admin View Menu Item Permission** is reserved exclusively for the **COR User Role** ([Section 4.8](#)) due to the elevated permissions, **CM** functions, and **Location** access.

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

Click the **OK** button to acknowledge the **User Permission** selections. The last User Role added or edited remains on the screen until another User Role is created or changed.

Figure 118: User Permissions Save Confirmation Window



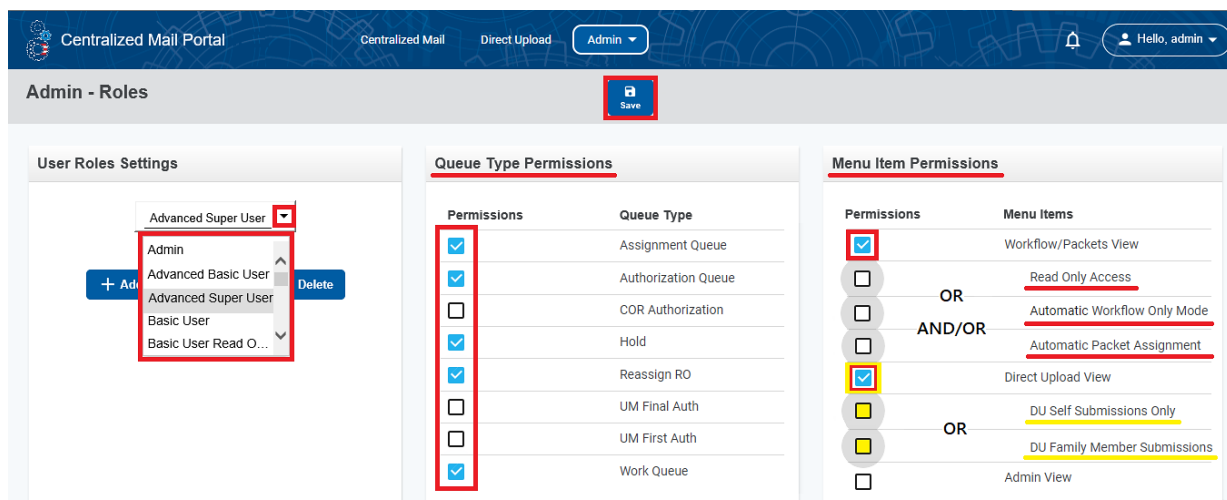
8.1.2 Edit a User Role

User Roles are modified solely by the **System Administrator** under the direction of a **COR**. Contact the **CM Portal** management team for **User Role** customization.

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

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

Figure 119: User Roles Settings Drop-down Options Menu



The **User Role** has full function access (all buttons) on the **Packet Actions Task Bar** ([Section 7.3](#)) for the chosen **Queue Type Permissions** ([Section 4.9](#)).

Packet Actions Task Bar buttons vary depending on the screen, number of rows chosen, **User Role**, **Queue** ([Section 4.9](#)), and current state of the packet (completed versus in progress).

The **Workflow/Packets View Menu Item Permission** enables **VA User Roles** to perform **CM** functions that process a packet through final disposition (Sections [6-7](#)) for the chosen **Queue Type Permissions**. All standard **VA User Roles** ([Section 4](#)) must assign the **Workflow/Packets View** permission. The **Workflow/Packets View** permission may be combined with other **Menu Item Permissions**.

Select the **Read Only Access Menu Item Permission** to restrict all **CM** functions except the **Task** buttons: **View Packet**, **Download**, **Export**, **History**, **Notes**, **Close**, and **Mark Unread**. This permission only activates when marked together with the **Workflow/Packets View** permission.

Select the **Automatic Workflow Only Mode Menu Item Permission** to establish **Automatic Workflow Mode Only** ([Section 7.4.1](#)) processing solely in the **Work Queue** at designated Locations. This permission only activates when marked together with the **Workflow/Packets View** permission and combined with the **Location** accessibility setting for **Automatic Workflow Mode Only** at a specific Location ([Section 8.3](#)).

Select the **Automatic Packet Assignment Menu Item Permission** to establish **Automatic Packet Assignment** ([Section 4.9.2](#)) solely in the **Work Queue** at designated Locations. This permission only activates when marked together with the **Workflow/Packets View** permission and combined with the **Location** accessibility setting for **Automatic Packet Assignment** at a specific Location ([Section 8.3](#)). In the **Editing User Role** window at the end of this section, mark the **Location Access** setting for **Role has access to no Locations** (Locations are assigned to Users in the “Admin – Users” module.).

Read Only Access cannot be assigned with **Automatic Workflow Only Mode** or **Automatic Packet Assignment**. Select either the **Read Only Access** option or the **Automatic** option(s) plus the **Workflow/Packets View** permission. **Automatic Workflow Only Mode** and **Automatic Packet Assignment** permissions may be assigned together.

The **Workflow/Packets View Menu Item Permission** marked together with the **Direct Upload View** permission authorizes **VA User Roles** to perform all **CM** functions and submit Veteran benefit claim documents through **Direct Upload** at designated **Locations**.

The **Direct Upload View Menu Item Permission** alone allows DU document submissions by a **VA Business Partner** or an accredited **VSO**.

The **DU Self Submissions Only Menu Item Permission** allows DU document submissions solely by the assigned **User** for their personal **Veteran File Number**. This permission only activates when marked together with the **Direct Upload View** permission.

The **DU Family Member Submissions Menu Item Permission** allows DU document submissions by the assigned **User** for multiple **Veteran File Numbers** (including their own). This permission only activates when marked together with the **Direct Upload View** permission.

DU Self Submissions Only and **DU Family Member Submissions** cannot be assigned together. Select one (1) option plus the **Direct Upload View** permission.

The **Admin View Menu Item Permission** is reserved exclusively for the **COR User Role** ([Section 4.8](#)) due to the elevated permissions, **CM** functions, and **Location** access.

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

Revise a **User Role Description** or **Location Access** by clicking the **Edit** button directly below the **User Roles Settings** drop-down options menu to reveal the **Editing User Role** window.

Figure 120: Editing User Role Window

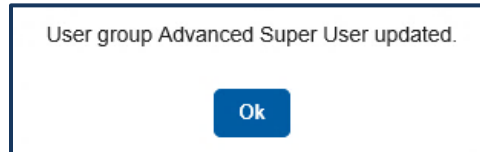
The screenshot shows a window titled "Editing 'Advanced Super User' User Role". It contains the following fields and options:

- Name ***: Advanced Super User
- Description ***: More Actions and functions beyond a regular Super User
- Choose location access for Role:**
 - Role has access to no Locations (Locations are assigned to Users in the "Admin – Users" module.)
 - Role has access to all Locations
 - Role has access to all Locations except RACC Locations
 - Role has access to no Locations (e.g., VSO user. Locations cannot be assigned to Users in the "Admin – Users" module.)
- Required Fields ***: (indicated by an asterisk)
- Buttons**: Cancel and Save

The **Save** button retains the updated **User Role** information, while the **Cancel** button or the **X** icon stops the action and exits the window.

Click the **OK** button to acknowledge the **User Role** adjustments. The last User Role added or edited remains on the screen until another User Role is created or changed.

Figure 121: User Role Update Confirmation Window



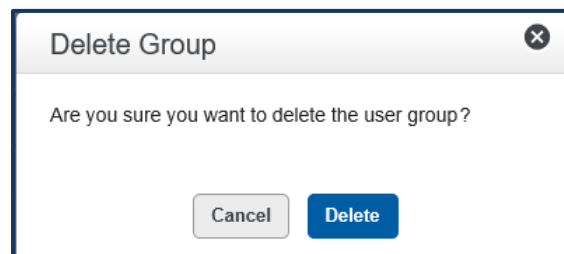
8.1.3 Delete a User Role

User Roles are modified solely by the **System Administrator** under the direction of a **COR**. Contact the **CM Portal** management team for **User Role** elimination.

Choose a **User Role** from the **User Roles Settings** drop-down **options menu**, and click the **Delete** button directly below. Default **User Roles** (Basic User, Super User, etc.) cannot be deleted.

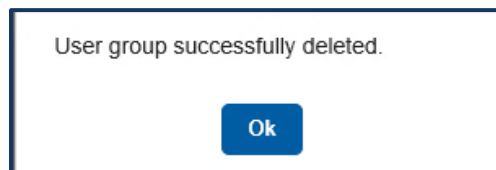
The **Delete** button in the **Delete Group** window removes the **User Role** from the menu list, while the **Cancel** button or the **X** icon stops the action and exits the window.

Figure 122: User Role Delete Group Window



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

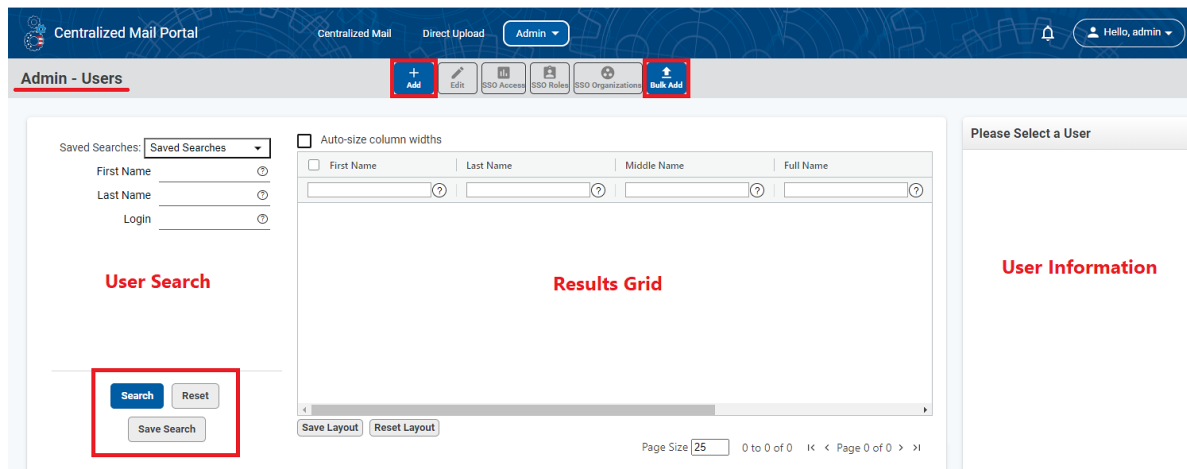
Figure 123: User Role Deleted Confirmation Window



8.2 Users

The **Users** option creates and edits **User** account profiles for VA employees, Veterans, Veteran Family Members, and VSO/VA Business Partner representatives 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 124: 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. Enter the **User Role** first (right side of the top row) using the drop-down **options menu** to initialize the appropriate fields.

Refer to [Section 4](#) for descriptions of the standard **VA User Roles**. Custom **VA User Roles** for VA employees with Single Sign-On Internal/External (**SSOi/SSOe**) access are available for **Centralized Mail (CM)** and **Direct Upload (DU)**:

- The **SSOe CM User Role** authorizes external access (outside of the VA network—remote) to the **Centralized Mail** application for the **User's** assigned standard **VA User Role(s)** and **Location(s)**. The **SSOe CM User Role** must be assigned together with a standard **VA User Role** to permit external **CM** access and cannot be the only assigned **User Role**.
- The **DU For CM User Role** authorizes access to the **Direct Upload** application for the **User's Basic User, Super User, and/or Supervisor User Role(s)** at the assigned **Location(s)**—dual access for **CM** and **DU**. The **DU For CM User Role** must be assigned together with a **Basic User, Super User, or Supervisor User Role** to permit **DU** access and cannot be the only assigned **User Role**. Do not assign the **DU For CM User Role** together with other **User Roles** that access the **Direct Upload** application (**VA DU Only User, Veteran, Veteran Family Member, or VSO Role**).
- The **DU Only User Role** grants internal access (**SSOi**) solely to the **Direct Upload** application for document submissions by authorized VA employees. Do not assign the **DU Only User Role** together with any standard **VA User Role** that accesses the **Centralized Mail** application.

External **Direct Upload User Roles** submit benefit claim documents on behalf of Veterans and their family members:

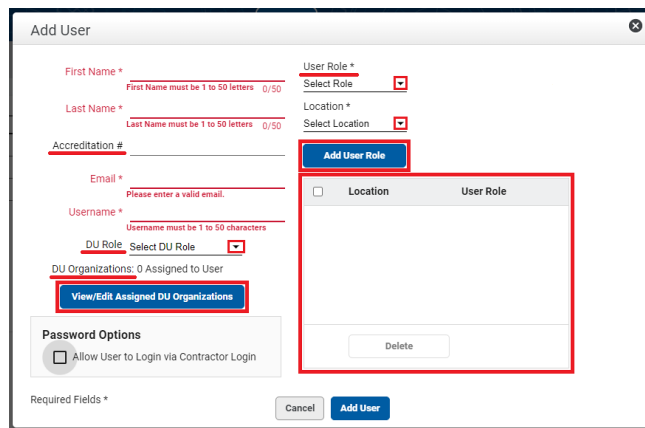
- The **Veteran User Role** accesses the **Direct Upload** application for **DU Self Submissions Only** related to the User's **Veteran File Number**. The **Middle Name** field is optional, but the **Veteran File Number** is required.
- The **Veteran Family Member User Role** accesses the **Direct Upload** application for **DU Family Member Submissions** related to multiple **Veteran File Numbers** (including their own).
- The **VSO User Role (VSO representatives and VA Business Partners)** should have a **DU Role** and **DU Organization(s)** assigned for the **Direct Upload** application, to assist with submission tracking and reporting metrics. The **Accreditation Number** field is optional.

Entries in red text fields and fields marked with an asterisk * are required. Fields shown in gray text are not editable. Fields with **Down Arrows** have an **options menu**.

The **Accreditation Number** field (optional) only applies to the **VSO User Role**. The **Email** address populates the **Username** field. **VA User Roles** that access the **Direct Upload** application and the **VSO User Role** should have a **DU Role** assigned.

DU Organization(s) must be assigned for all **User Roles** (internal and external) that access the **Direct Upload** application. Assign a **VA LOB**, program department, or **Location** type as the **DU Organization** for **VA User Roles**. The **VSO User Role** lists the official name of the affiliated organization, program, or agency represented during claims submission. Add **Veteran** or **Veteran Family Member** respectively for those **User Roles**.

Figure 125: Add User Window

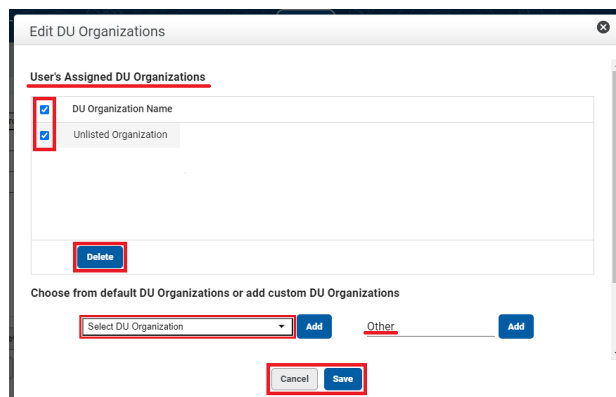


Click the **View/Edit Assigned DU Organizations** button to display the **Edit DU Organizations** window. Use the **Vertical Scroll Bar** to navigate to the bottom of the window.

Select DU Organization(s) from the drop-down options menu. If a **DU Organization** is not in the **options menu**, type the **DU Organization's** name in the **Other** field (up to 50 alphabetical characters). Click the **Add** button to record the information in the **User's Assigned DU Organizations** listing.

Repeat this process to include all **DU Organizations** (listed and unlisted) for the **User**. Refer to [Section 8.6](#) for instructions on adding new **VA**, **VSO**, and **VA Business Partner DU Organizations** to the system.

Figure 126: Add User – Edit DU Organizations Window



Remove a **DU Organization** by marking the checkbox on the left side of the **DU Organization Name** to designate the entity or **DU Organization Name header** to remove all listings, and click the **Delete** button.

The **Save** button assigns the **DU Organization(s)** to the **User**, while the **Cancel** button or the **X** icon stops the action and exits the window.

Assign only one (1) **User Role** without **Location** access (**VA DU Only User**, **Veteran**, **Veteran Family Member**, or **VSO Role**) per User. Do not assign the aforementioned **User Roles** together with any standard **VA User Roles** that access the **Centralized Mail** application (including the **DU For CM User Role**).

No other **User Role** can be assigned when the **COR** or **Quality Assurance User Role** is designated, except the **SSOe CM User Role**.

Multiple **User Roles** cannot be assigned at the same **Location**. Do not assign the **National Reviewer Role** (read-only) together with any standard **VA User Role(s)**.

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 multiple **User Roles** and **Locations** when necessary.

Remove a **Location/User Role** by marking the checkbox on the left side of the **Location** name or **Location header** (removes all listings), and click the **Delete** button.

Figure 127: Designate Location/User Role and Add User

The screenshot shows the 'Add User' window with the following details:

- First Name ***: Eve (3/50)
- Last Name ***: Moneypenny (11/50)
- Accreditation #**: [Empty]
- Email ***: emoneypenny@va.gov
- Username ***: emoneypenny
- DU Role**: Select DU Role
- User Role ***: Super User
- Location ***: DC DROC
- DU Organizations**: 0 Assigned to User
- Password Options**: Allow User to Login via Contractor Login
- Location/User Role Table**:

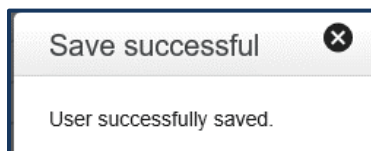
Location	User Role
<input type="checkbox"/>	ALL EXCEPT SPECIAL Advanced Super User
<input checked="" type="checkbox"/>	Baltimore Super User
<input checked="" type="checkbox"/>	DC DROC Super User
- Buttons**: Add User Role, View/Edit Assigned DU Organizations, Delete, Cancel, Add User

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

Do not refresh or close the CM Portal browser window while **Add User Loading** is in progress.

The **X** icon in the upper right corner of the **Save Successful** confirmation window returns to the **Admin-Users** screen.

Figure 128: Add User Save Successful Confirmation Window



8.2.2 Bulk Add Multiple Users


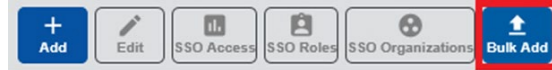
The **Bulk Add**  button on the right side of the **Task Bar** at the top of the screen uploads a comma-separated values (**CSV**) file with information for multiple Users that efficiently creates a large number of new Users without extensive manual data entry.

Figure 129: Admin-Users Task Bar

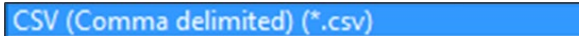


8.2.2.1 Create the Bulk Add CSV File

A **CSV** file is a text file. 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 130: 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 (including spaces and hyphens) only with a 50-character maximum limit
B	Middle Name	Optional	Letters A–Z (including spaces and hyphens) only with a 50-character maximum limit
C	Last Name	Required	Letters A–Z (including spaces and hyphens) only with a 50-character maximum limit
D	Accreditation #	Optional	Numerical (0–9) values only with a six-digit limit
E	Veteran File #	Required <u>ONLY</u> for <u>Veteran User Role</u>	Numerical (0–9) values only Eight (8) or nine (9) digits required
F	Email Address	Required	Use a valid email format (e.g., First.Last@va.gov). Username is generated from the email address.
G	DU Role	VA/VSO User Role with DU access	Use a valid VA/VSO/VA Business Partner DU Role listed in the CM Portal.
H	Organization Name	<u>All</u> User Roles with DU access	Use a valid DU Organization or VA LOB listed in the CM Portal, Veteran, or Veteran Family Member
I	Contractor Login	Required	Y (Yes) or N (No)
J	(User) Role	Required	Use valid User Role(s) available in the CM Portal. Create a comma-separated Role list.
K	Location	Required	Use valid Location(s) available in the CM Portal. Create a comma-separated Location list.

Figure 131: CSV File Column Value Order

A	B	C	D	E	F	G	H	I	J	K
First Name	Middle Name	Last Name	Accreditation #	Veteran File #	Email Address	DU 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 (PMCMS-CMPortal-AddBulkUserTemplate-v1.12) facilitates creation of the **Bulk Add** CSV file. Use of this template is not required.



PMCMS-CMPortal-AddBulkUserTemplate

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

- DU Role (Column G)
- (DU) Organization Name (Column H)
- Contractor Login (Column I)
- (User) Role (Column J)
- Location (Column K)

Use the column field value **Tabs** at the bottom of the **Worksheet** to add new options to the drop-down lists (Columns **G–H** and **J–K**) when necessary. New options must be valid **VA/VSO/VA Business Partner DU Roles, DU Organizations, User Roles, and Locations** 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 **J–K**. A yellow **Message Bar** with a **Security Warning** may appear at the top of the screen. Click the **Enable Content** button to activate the Excel macro function. The **Macro Settings** may be disabled in the Microsoft Excel **Trust Center** by the VA enterprise System Administrator for security reasons. If this occurs, additional **DU Organizations, User Roles, and Locations** may be entered after the **Bulk Add Upload** process completes by following the instructions in Sections [8.2.3–8.2.4](#).

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 transmits to the CM Portal for **Bulk Add Upload**, the header row becomes **Invalid**. The **Invalid State** does not negatively affect 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 the **CSV** file format.

8.2.2.1.2 Multiple Roles and Locations per User

Every Role for each Location assignment must be explicitly indicated for each User. The number of **Roles** (Column J) must equal the number of **Locations** (Column K):

- 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 **Quality Assurance Roles** apply to all Locations. Select "**ALL**" from the **Location** options list for assignment to these **Roles**.
- The **National Reviewer Role** applies to all Locations except those marked as Restricted. Select "**ALL EXCEPT SPECIAL**" from the **Location** options list for assignment to this **Role**.
- The **SSOe CM User Role** must be assigned together with standard VA User Role(s) and **Location(s)** to permit external CM access. Select "**SECONDARY**" from the **Location** options list for assignment to this **Role**.
- The **DU For CM User Role** must be assigned together with **Basic, Super, and/or Supervisor User Role(s)** and **Location(s)** to permit **DU** access. Select "**SECONDARY**" from the **Location** options list for assignment to this **Role**.
- The **VA DU Only User, Veteran, Veteran Family Member, and VSO Roles** are not affiliated with a **Location**. Select "**NOT APPLICABLE**" 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 User** or **Quality Assurance Role** is designated, except the **SSOe CM User Role**.
- Multiple **Roles** cannot be assigned at the same Location. Do not assign the **National Reviewer Role** (read-only) together with any standard VA User Role(s).
- Do not assign **VA DU Only User, Veteran, Veteran Family Member, or VSO Roles** together or with any standard VA User Roles that access the **Centralized Mail** application (including the **DU For CM User Role**).

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 J–K.

Figure 132: Multiple Roles and Locations Example in the Excel Template

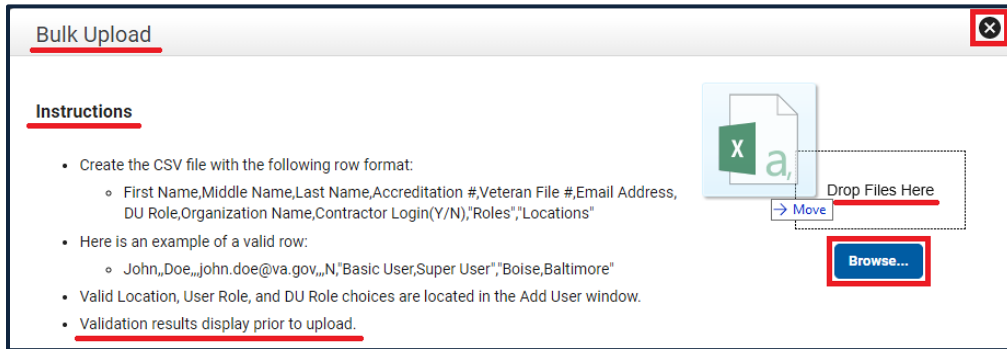
	A	B	C	D	E	F	G	H	I	J	K
1	First Name	Middle Name	Last Name	Accreditation #	Veteran File #	Email Address	DU Role	Organization Name	Contractor Login	Role	Location
2	Roger		Daltry			Roger.Daltry@va.gov			N	Basic User,Supervisor User Role	Boston,Baltimore

8.2.2.2 Complete Bulk Add Users

When the **CSV** file 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 **X** icon in the upper right corner of the window returns to the **Admin-Users** screen.

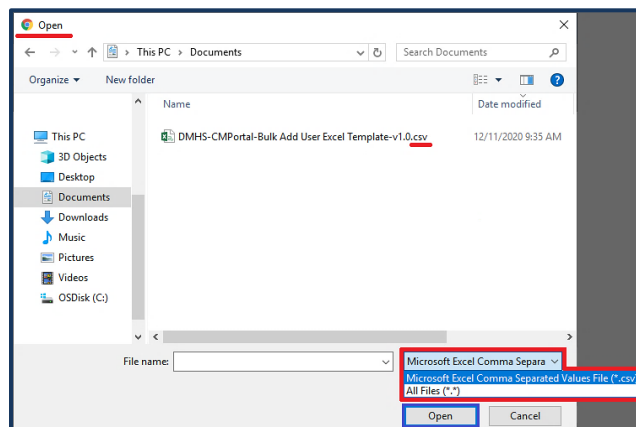
Figure 133: Bulk Upload Window



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

- Click the **Browse** button to activate the **Open** pop-up window. Select the appropriate document, and click the **Open** button to initiate file transmission.
- Drag the file from the computer desktop or designated folder in **File Explorer** and release in the **Drop Files Here** box.

Figure 134: Select CSV File to Upload



The CM Portal validates the CSV file automatically when the file uploads. The **Bulk Upload Validation Results Grid** displays either a **Valid** or an **Invalid State** (first column) for each entry row in the file.

The **Error** column (second) lists the validation failure reason. If multiple error conditions exist for the row, only the first error condition encountered is noted.

If the column header title row from the Excel Template was not deleted prior to saving the **CSV** file, the header row (first 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 135: Bulk Upload Validation Results Grid

State	Error	First Name	Middle Name	Last Name	Accreditation	Veteran File Number	Email Address	DU Role	Organization Name	Contractor Login	Role
INVALID	Invalid Accreditation # (must be blank or 1-6 digits) (Accredita...	First Name	Middle Name	Last Name	Accreditation #	Veteran File #	Email Address	DU Role	[Organization Name]	Contractor Login	Role
VALID		Bulk	Test	User			bulktest1@va.gov	<input type="checkbox"/>		Y	Basic User
VALID		Bulk	Test	User			bulktest2@va.gov	<input type="checkbox"/>		N	Basic User
INVALID	Only standard roles supported: (National Reviewing)	Bulk	Test	User			bulktest3@va.gov	<input type="checkbox"/>		N	National Revi...
INVALID	Middle name contains invalid characters: [9]	Ames	9	Andy			ames.a.andy@va.gov	<input type="checkbox"/>		N	Basic User
INVALID	Invalid number of columns. Must be 11. Was (1)							<input type="checkbox"/>			

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

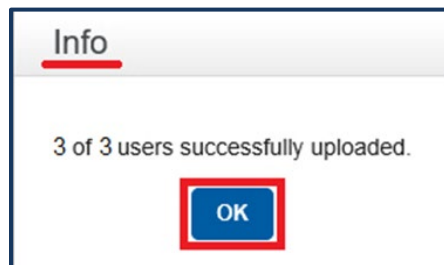
The **Cancel** button or the **X** icon in the upper right corner of the window exits the **Bulk Upload Validation Results Grid** and returns to the **Admin-Users** screen.

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

An **Info** (Information) confirmation window announces the number of new **Users** that were successfully created in 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. The system did not duplicate the entry.

Figure 136: Info Confirmation Window



8.2.3 Search for a User

Specify at least one (1) **Search** criterion in any field on the left side of the screen. Text is not case-sensitive. The **X** icon on the right side of the field deletes the entry. Click the **Search** button to view all results matching the designated criteria.

Search all available **Users** by clicking the **Search** button without entering any criteria in the **Search** fields.

Click the **Question Mark** (?) icon to display the **Search Options** symbols ([Section 6.3.1](#)). Use these symbols to define the search results by entering one (1) symbol (no space before or after) with the search parameter for the chosen criteria. The **X** icon closes the **Search Options** window.

Different **Search Options** symbols cannot be combined in the **Search Criteria** field; however, two (2) **Wildcard** characters * or several **Multiple** characters ; are permitted to define the search results.

Position the **Wildcard** character * after the letters with no extra space to find all results that begin with those letters. If the **Wildcard** character * is placed before the letters, all results ending with those letters display. Use a **Wildcard** character * at the beginning and ending of a search parameter to find all results containing the letters entered.

Figure 137: User Search and Results Grid Sorting or Filtering

The screenshot shows the 'Admin - Users' interface. On the left, there are search criteria fields: 'First Name >e', 'Last Name Incense', and 'Login'. A 'Saved Searches' dropdown is also present. Below these are 'Search', 'Reset', 'Save Search', and 'Delete Search' buttons. The main area contains a table with columns for 'First Name', 'Last Name', 'Middle Name', and 'Full Name'. A row is visible with 'Frank' and 'Incense'. To the right, there is a 'Please Select a User' panel. The top navigation bar includes 'Centralized Mail Portal', 'Centralized Mail', 'Direct Upload', 'Admin', and a user profile 'Hello, admin'.

Results Grid Sorting ([Section 6.2.2.6](#)) and/or **Filtering** ([Section 6.2.2.7](#)) with the **Search Options** symbols further refine multiple results to locate a particular **User**.

Select the **Save Search** button to save a set of **Search Criteria** ([Section 6.3.2](#)). The **Cancel** button or the **X** icon stops the action and exits the window. The **Saved Searches** options menu locates a **Saved Search**. Click on the desired **Search** name to display the related **Users**.

The **Delete Search** button removes the selected **Saved Search** from the options menu.

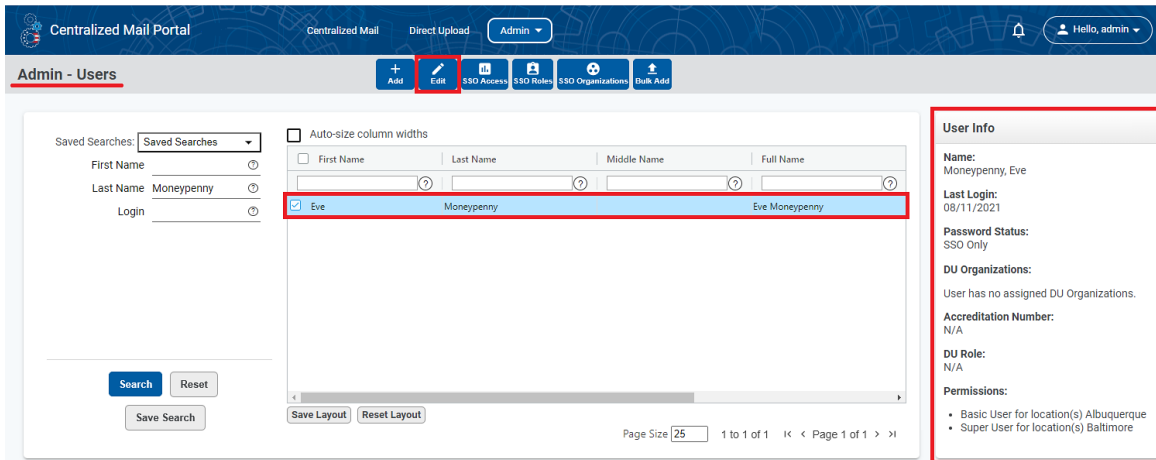
The **Reset** button clears the contents in all **Search Criteria** fields. The **Results Grid** retains information from the previous **Search** until a new **Search** is performed or the CM Portal session ends.

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 full **Task Bar** above the **Results Grid**.

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

Figure 138: View and Edit User Information



Update any information that may have changed since the User was established in the **Editing User** window. **Account Options** enable resetting a password or disabling an account. Refer to [Section 8.2.1](#) for additional instructions.

External Direct Upload User Roles submit benefit claim documents on behalf of Veterans and their family members:

- The **Veteran User Role** accesses the **Direct Upload** application for **DU Self Submissions Only** related to the User's **Veteran File Number**. The **Middle Name** field is optional, but the **Veteran File Number** is required.
- The **Veteran Family Member User Role** accesses the **Direct Upload** application for **DU Family Member Submissions** related to multiple **Veteran File Numbers** (including their own).
- The **VSO User Role** (**VSO** representatives and **VA Business Partners**) should have a **DU Role** and **DU Organization(s)** assigned for the **Direct Upload** application, to assist with submission tracking and reporting metrics. The **Accreditation Number** field is optional.

Assign only one (1) **User Role** without **Location** access (**VA DU Only User**, **Veteran**, **Veteran Family Member**, or **VSO Role**) per User. Do not assign the aforementioned **User Roles** together with any standard **VA User Roles** that access the **Centralized Mail** application (including the **DU For CM User Role**).

VA User Roles that access the **Direct Upload** application and the **VSO User Role** should have a **DU Role** assigned.

DU Organization(s) must be assigned for all **User Roles** (internal and external) that access the **Direct Upload** application. Assign a **VA LOB**, program department, or **Location** type as the **DU Organization** for **VA User Roles**. The **VSO User Role** lists the official name of the affiliated organization, program, or agency represented during claims submission. Add **Veteran** or **Veteran Family Member** respectively for those **User Roles**.

No other **User Role** can be assigned when the **COR** or **Quality Assurance User Role** is designated, except the **SSOe CM User Role**. Multiple **User Roles** cannot be assigned at the same **Location**. Do not assign the **National Reviewer Role** (read-only) together with any standard **VA User Role(s)**.

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 multiple **User Roles** and **Locations** when necessary.

Remove a **Location/User Role** (no longer authorized) by marking the checkbox on the left side of the **Location** name or **Location** header (removes all listings), and click the **Delete** button.

Figure 139: Editing User Window

The screenshot shows the 'Editing User emoneypenny' window. It includes the following elements:

- Form Fields:** First Name * Eve (3/50), Last Name * Moneypenny (10/50), Accreditation #, Email * emoneypenny@va.gov, DU Role: Select DU Role, User Role * (Select Role dropdown), Location * (Select Location dropdown).
- Buttons:** Add User Role, View/Edit Assigned DU Organizations, Delete.
- Table:**

Location	User Role
<input type="checkbox"/> Albuquerque	Basic User
<input type="checkbox"/> Baltimore	Super User
<input type="checkbox"/> C&P Pacific District	Super User
- Account Options:**
 - Allow User to Login via Contractor Login
 - Reset Password
 - Disable Account
- Two Factor Authentication:** Hex Key, Algorithm, # Digits, # Intervals.
- Required Fields *:** Cancel, Save (highlighted with a red box).

The **Save** button modifies the **User Info**, while the **Cancel** button or the **X** icon stops the action and exits the window.

Do not refresh or close the CM Portal browser window while **Updated User Data Loading** is in progress.

The **X** icon in the upper right corner of the **Save Successful** confirmation window returns to the **Admin-Users** screen.

8.3 Locations

The **Queue Hierarchy** ([Section 6.1](#)) adjusts to accommodate program organizational structure, processing functions, and **Location** types for a specific **Line of Business (Level 1)**. The **Locations** option adds, changes, or removes **Locations** (Levels) in the **Queue Hierarchy** on the **Queues Tab**.

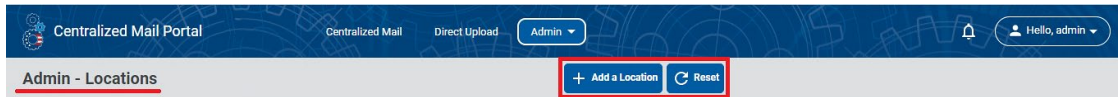
The **Reset** button on the **Task Bar** at the top of the screen exits any window and returns to the main **Locations** screen.

8.3.1 Add a Location

Add **Locations** on **Levels 1–4** of the **Queue Hierarchy**. Click the **Add a Location** button on the **Task Bar** to add a new **Line of Business** on **Level 1** or a **Location** on **Levels 2–4**.

At a minimum, fields marked with an asterisk * are required. Fields with **Down Arrows** have an **options menu**. An **Error** message appears if the field entries are invalid or omitted.

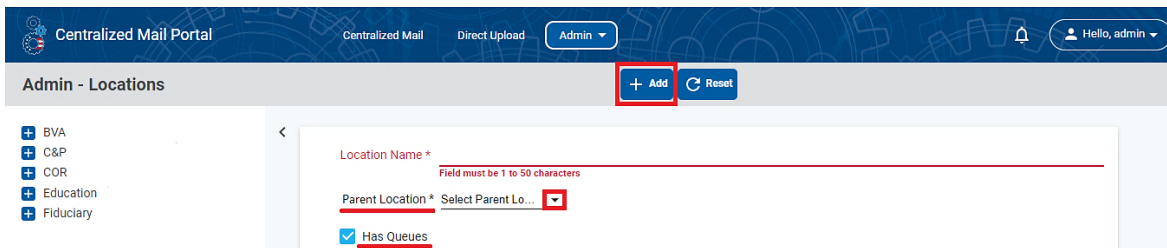
Figure 140: Admin – Locations Screen



The **Location Name** is the nomenclature shown throughout the CM Portal when referencing the **Location (Level)**. Enter the **Location Name** for **Levels 2–4** or the **Line of Business** to establish **Level 1**.

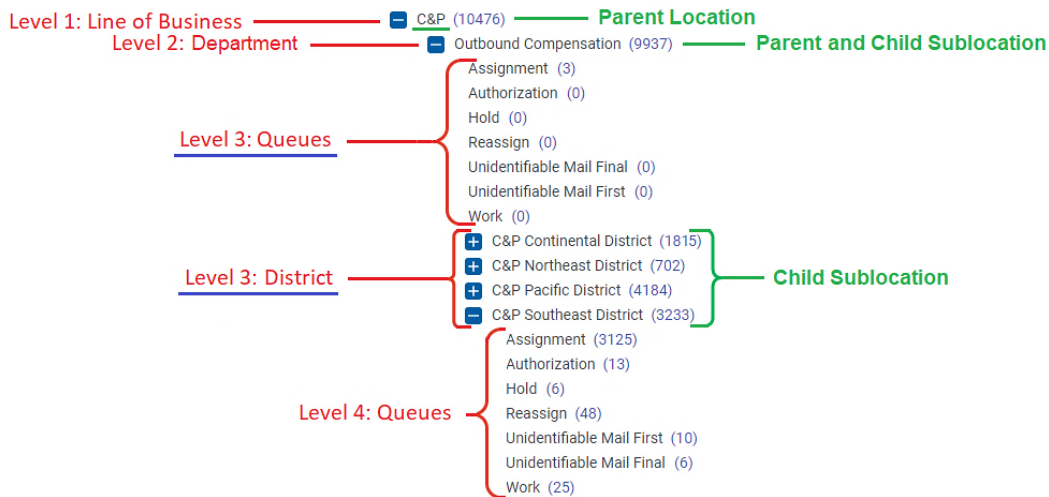
The **Location Name** cannot be edited. If a **Location Name** is incorrect, delete the inaccurate **Location** **PRIOR** to assigning packets to the processing **Queues**. **Locations** with processing **Queues** cannot be deleted once packets have been assigned to any **Queue** (even if currently empty). Add a new **Location** with the correct name.

Figure 141: Add a Location Screen – Location Name, Parent Location, and Queues



Locations without processing **Queues** are always “parents” of other **Locations** that are used to group sublocations together in a logical set. **Locations** on **Levels 2–4** with processing **Queues** may still be “parents” of other “child” sublocations. **Queues** on **Levels 2–4** display above other hierarchical types on the same level. Sublocations with processing **Queues** appear at the bottom of the **Queue Hierarchy**.

Figure 142: Parent and Child Locations with Processing Queues Example



The **Parent Location** setting determines the **Location Level** in the **Queue Hierarchy**. **Locations** in the **Queue Hierarchy** on the left side of the screen appear in the drop-down options menu. Select **None** to simply add a **Line of Business** on **Level 1** or enter the **Parent Location** for **Levels 2–4**. Filter the options menu by typing part of the **Parent Location** name to reduce the choices or scroll through the entire list. Text is not case-sensitive.

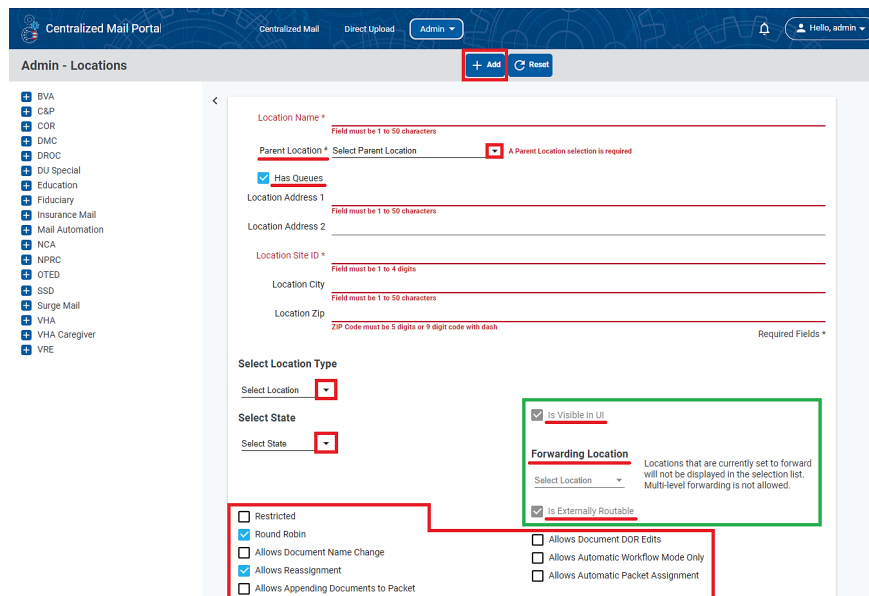
If a **Location** (regardless of its **Level**) has processing **Queues**, mark the **Has Queues** checkbox. Complete the remaining fields on the **Add a Location** screen. Remove the checkmark if the **Location** does not have processing **Queues**, and click the **Add** button on the **Task Bar** to establish the new **Location**.

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

The eight (8) conditional checkboxes at the bottom of the window determine **User accessibility**:

- **Restricted** – **Location** only appears in the assigned **Queue Hierarchy** or **Search** results generated by a **COR** or **CM Users** with special **Location access** permission
- **Round Robin** – balanced distribution process that directs new unrouteable packets to participating **Locations**
- **Allows Document Name Change** – edit the document type in the **Document Name** field from the **Document Indexing** ([Section 7.2.3](#)) menu on the **Packet Detail** screen for packets at that **Location**
- **Allows Reassignment** – **Location** appears in the **Reassign-Locations** options menu ([Section 7.3.7](#)) to receive packets for processing by any **CM User** at any **Location** (not restricted to the receiving **Reassign Location**)
- **Allows Appending Documents to Packet** – authorized **CM User Roles** at that **Location** (**Assigned User** and superiors) attach Portable Document Format (**PDF**) files of Master Category List (MCL) documents to packets in the **Work and Hold Queues** ([Section 7.3.12](#))
- **Allows Document DOR Edits** – edit the document **Received Date** field from the **Document Indexing** ([Section 7.2.3](#)) menu on the **Packet Detail** screen for packets at that **Location**
- **Allows Automatic Workflow Mode Only** – establish **Automatic Workflow Mode Only** ([Section 7.4.1](#)) processing solely in the **Work Queue** at that **Location** – applicable to any **User Roles** with the **Automatic Workflow Only Mode Menu Item Permission** ([Section 8.1](#))
- **Allows Automatic Packet Assignment** – establish **Automatic Packet Assignment** ([Section 4.9.2](#)) solely in the **Work Queue** at that **Location** – applicable to any **User Roles** ([Section 8.1](#)) with the **Automatic Packet Assignment Menu Item Permission** and **Location Access** setting for **Role** has **access to no Locations** (Locations are assigned to Users in the “Admin – Users” module).

Figure 143: Add a Location Screen



The three (3) attributes in the middle of the window (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, Reassign, 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) with the following stipulations:
 - **Locations** that redirect packets to a **Forwarding Location** and any **Locations** that are designated to receive packets as a **Forwarding Location** are excluded from the drop-down **options menu**. Multi-level forwarding is not allowed.
 - **Locations** that are designated as a **Forwarding Location** to receive packets cannot select a **Forwarding Location** for their packets. The **Forwarding Location** field is disabled, and a notification message displays.
- **Is Externally Routable** – When the checkbox is marked, the **Location** allows transmissions from conversion **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 on the **Task Bar** establishes the new **Location**, while the **Reset** button exits the window and returns to the main **Locations** screen.

8.3.2 Edit a Location

Select the **Location** (Level) in the **Queue Hierarchy** on the left side of the screen.

The **Location Name** cannot be edited. If a **Location Name** is incorrect, delete the inaccurate **Location** **PRIOR** to assigning packets to the processing **Queues**. **Locations** with processing **Queues** cannot be deleted once packets have been assigned to any **Queue** (even if currently empty). Add a new **Location** with the correct name.

The **Parent Location** cannot be edited. If a **Parent Location** is incorrect, delete the **Location** (Level) **PRIOR** to assigning packets to the processing **Queues**. **Locations** with processing **Queues** cannot be deleted once packets have been assigned to any **Queue** (even if currently empty). Add a new **Location** (Level) with the correct **Parent Location**.

The **Queue** designation (**Has Queues** or none) cannot be edited. If the **Queue** designation is incorrect, delete the **Location** (Level) **PRIOR** to assigning packets to the processing **Queues**. **Locations** with processing **Queues** cannot be deleted once packets have been assigned to any **Queue** (even if currently empty). Add a new **Location** (Level) with the correct **Queue** designation.

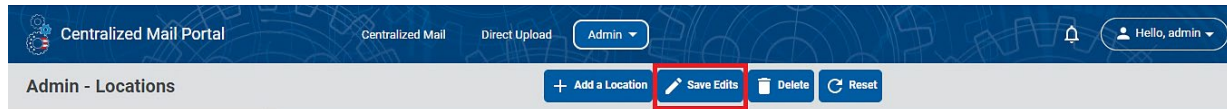
If a **Location** has processing **Queues**, refer to [Section 8.3.1](#) for instructions regarding the eight (8) conditional checkboxes at the bottom and the three (3) attributes in the middle of the window.

Locations designated as a **Forwarding Location** to receive packets cannot select a **Forwarding Location** for their packets. The **Forwarding Location** field is disabled, and a notification message displays.

Locations that redirect packets to a **Forwarding Location** and any **Locations** designated to receive packets as a **Forwarding Location** are excluded from the drop-down **options menu**. Multi-level forwarding is not allowed.

Click the **Save Edits** button on the **Task Bar** to update the information. An **Error** message appears if the field entries are invalid or omitted.

Figure 144: Save Edits Button



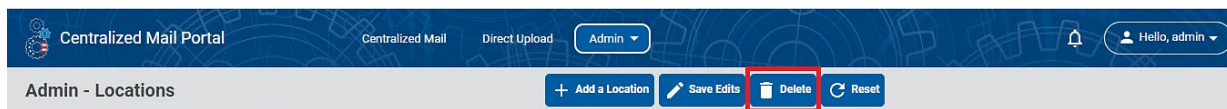
8.3.3 Delete a Location

Locations are deleted by starting at the lowest level of the **Queue Hierarchy** and proceeding in reverse order from **Level 4** 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 were previously assigned to any Queue (even if currently empty).

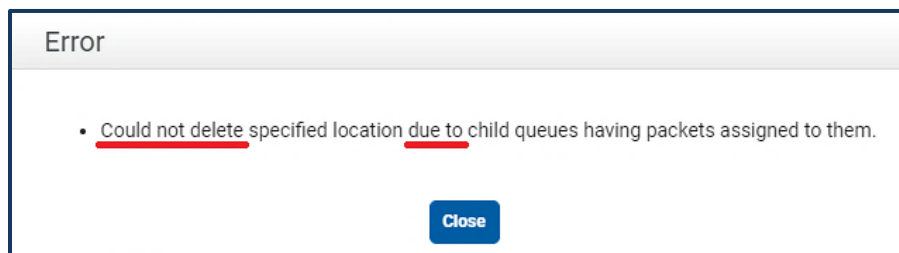
Select the **Location** (Level) in the **Queue Hierarchy** on the left side of the screen. Click the **Delete** button on the **Task Bar** to remove the **Location**.

Figure 145: Delete a Location



An **Error** message appears if the **Location** cannot be removed. The **Close** button exits the window. Otherwise, the **Location** is automatically eliminated, and the display returns to the main **Locations** screen.

Figure 146: Delete Location Error Message Example



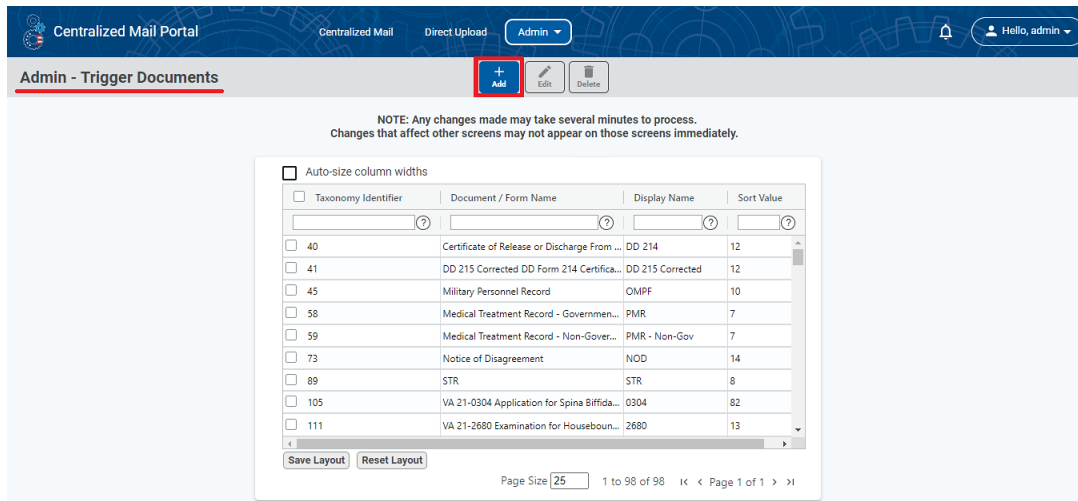
8.4 Trigger Documents

The **Trigger Documents** option creates and edits actionable items shown in the **Document Type** column of the **CM Packet Results Grid** ([Section 6.2](#)) that prompt special treatment, priority handling, or group processing for packets containing the identified **Trigger Documents**.

Add, edit, or delete **Trigger Documents** based on Master Category List (MCL) document types.

Trigger Document modifications do not process immediately and may take several minutes to register in the **Document Type** column of the **CM Packet Results Grid** and on the **Admin-Trigger Documents** screen.

Figure 147: Admin – Trigger Documents Screen



8.4.1 Add a Trigger Document

Click the **Add** button on the **Task Bar** above the **Results Grid** to display the **Add Trigger Document** window.

Entries in red text fields and fields marked with an asterisk * are required. Fields shown in gray text are not editable. Fields with **Down Arrows** have an **options menu**.

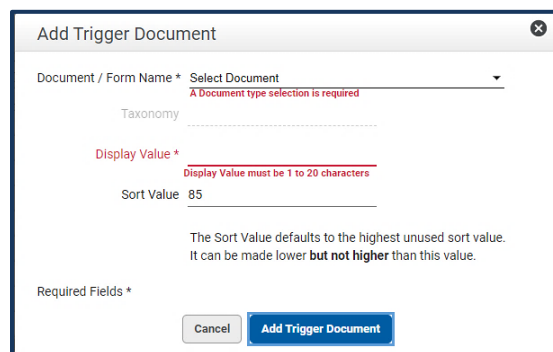
Select a **Document/Form Name**. The drop-down **options menu** excludes **Document Types** currently designated as **Trigger Documents**. Filter the options menu by typing part of the **Trigger Document** name/type to reduce the choices or scroll through the entire list. Text is not case-sensitive.

The **Taxonomy Identifier** number populates for the chosen document type and is not editable.

The **Display Name Value** is the condensed nomenclature (short name) shown in the **Document Type** column. Enter a **Display Name Value** (any combination of up to **20** alphabetical, numerical, or special characters) that does not contain leading or ending spaces. An **Error** message appears if the **Display Name Value** is invalid or omitted.

The **Sort Value (1–9,999)** determines the **Trigger Document** list display order (lowest to highest **Sort Value**) in the **Document Type** column. The **Sort Value** defaults to the next available number at the end of the current list; a higher number cannot be chosen. Enter a lower number if necessary to obtain the desired **Sort Value**. Some **Trigger Documents** may have the same **Sort Value**.

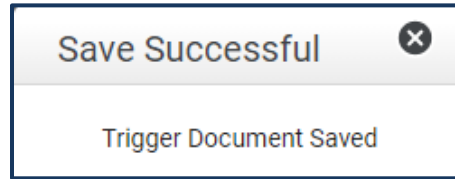
Figure 148: Add Trigger Document Window



The **Add Trigger Document** button establishes the new **Trigger Document** in the system, while the **Cancel** button or the **X** icon stops the action and exits the window.

The **X** icon in the upper right corner of the **Save Successful** confirmation window returns to the **Admin-Trigger Documents** screen.

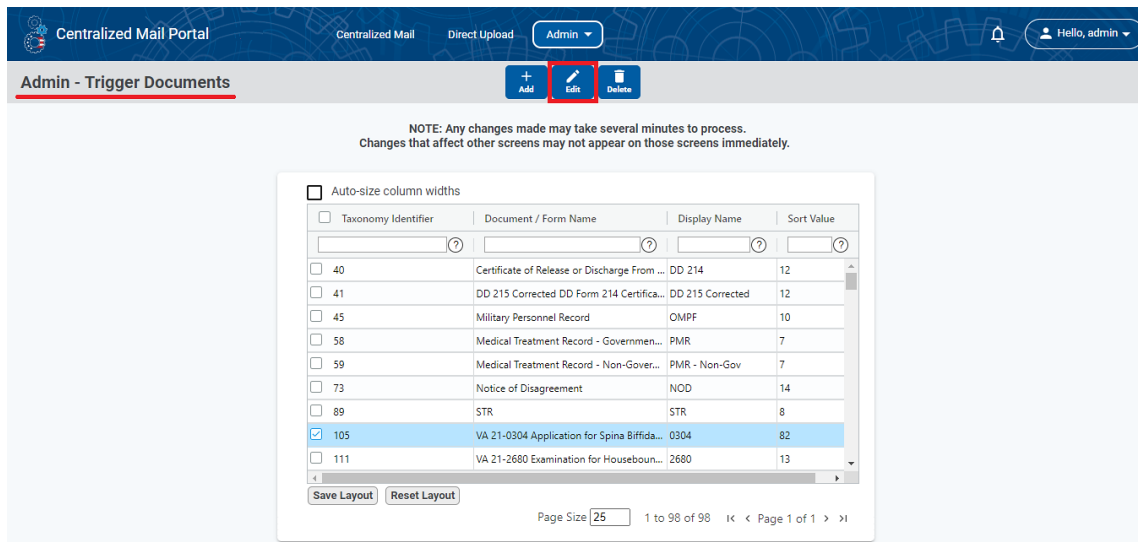
Figure 149: Add Trigger Document Save Successful Confirmation Window



8.4.2 Edit a Trigger Document

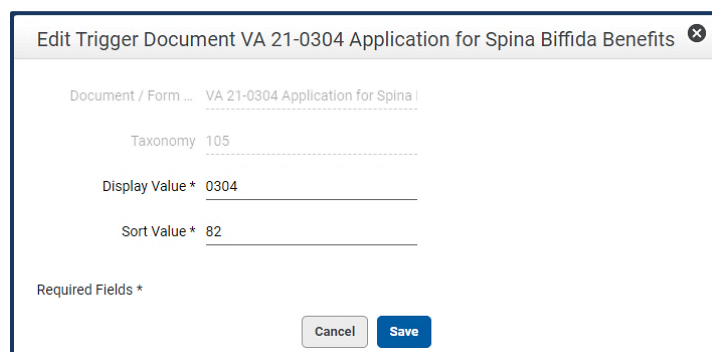
A single click anywhere along any row in the **Results Grid** selects that **Trigger Document** (highlighted in blue) and subsequently opens the full **Task Bar** above the **Results Grid**.

Figure 150: Select and Edit a Trigger Document



Click the **Edit** button on the **Task Bar** to make necessary revisions to the **Display Name Value** and the **Sort Value** in the **Edit Trigger Document** window.

Figure 151: Edit Trigger Document Window



The **Display Name Value** is the condensed nomenclature (short name) shown in the **Document Type** column. Enter a **Display Name Value** (any combination of up to **20** alphabetical, numerical, or special characters) that does not contain leading or ending spaces. An **Error** message appears if the **Display Name Value** is invalid or omitted.

The **Sort Value (1–9,999)** determines the **Trigger Document** list display order (lowest to highest) in the **Document Type** column. Deleting the current **Sort Value** defaults to the next available number (higher) at the end of the current list. Enter a lower number if necessary to obtain the desired **Sort Value**. Some **Trigger Documents** may have the same **Sort Value**.

The **Save** button modifies the **Trigger Document**, while the **Cancel** button or the **X** icon stops the action and exits the window.

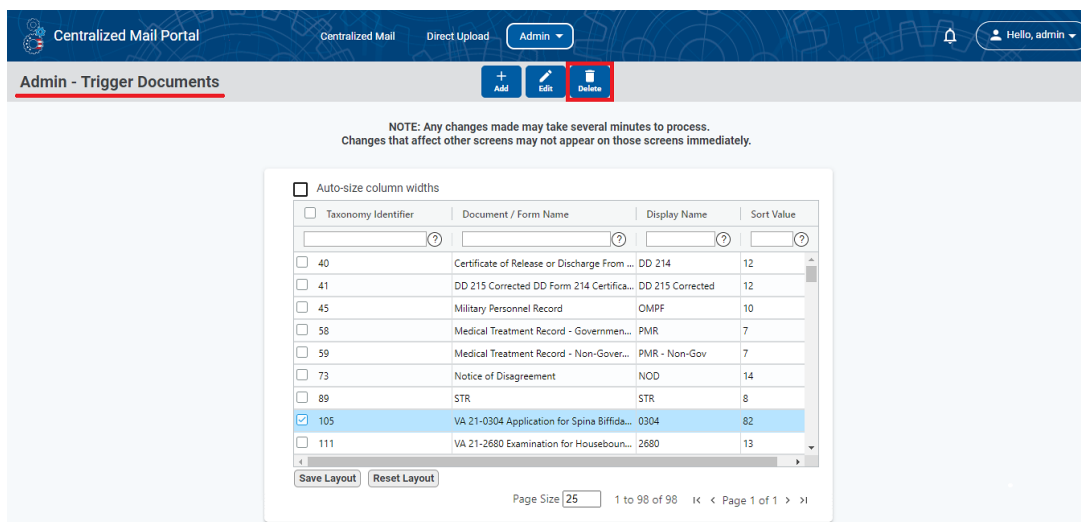
The **X** icon in the upper right corner of the **Save Successful** confirmation window returns to the **Admin-Trigger Documents** screen.

8.4.3 Delete a Trigger Document

A single click anywhere along any row in the **Results Grid** selects that **Trigger Document** (highlighted in blue) and subsequently opens the full **Task Bar** above the **Results Grid**.

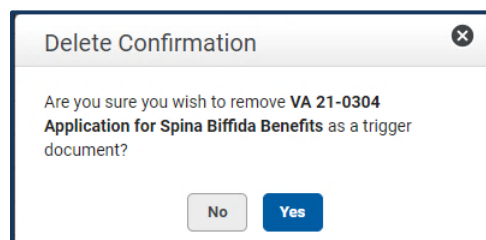
Click the **Delete** button on the **Task Bar** to eliminate the **Trigger Document** from the actionable item list.

Figure 152: Select and Delete a Trigger Document



The **Yes** button in the **Delete Confirmation** window removes the **Trigger Document**, while the **No** button or the **X** icon stops the action and exits the window.

Figure 153: Delete Confirmation Window

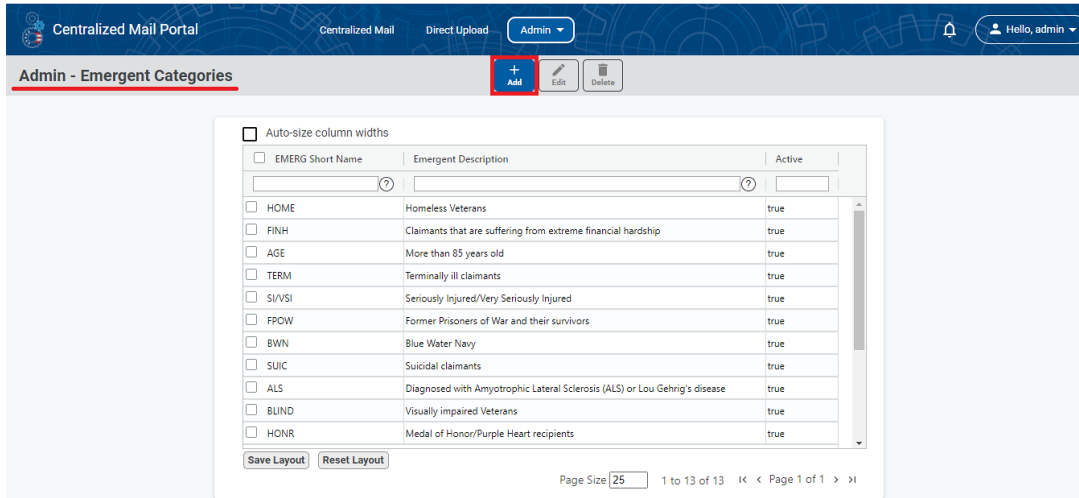


8.5 Emergent Categories

An **Emergent Flash** (emergent situation) is a packet-level indicator that represents a significant benefit claim attribute, fact, or status that is unlikely to change. **Emergent Flashes** associated with a packet require priority processing and expedited handling at all stages of the claims process.

The **Emergent Categories** option creates and edits **Emergent Flashes** shown in the **EMERG** field from the **Packet Indexing** ([Section 7.2.2](#)) menu on the **Packet Detail** screen and **Direct Upload** application ([Section 3.2](#)).

Figure 154: Admin – Emergent Categories Screen



8.5.1 Add an Emergent Category

Click the **Add** button on the **Task Bar** above the **Results Grid** to display the **Add Emergent Category** window.

Entries in red text fields and fields marked with an asterisk * are required. Text is case-sensitive.

Figure 155: Add Emergent Category Window

The **EMERG Short Name** is the condensed nomenclature shown for **Emergent Flashes** in the system. Enter an **EMERG Short Name** (any combination of up to **10** alphabetical, numerical, or special characters) that does not contain spaces.

A new **EMERG Short Name** cannot include an existing **EMERG Short Name** or represent an abbreviated version. An **Error** message appears if the **EMERG Short Name** is invalid or omitted.

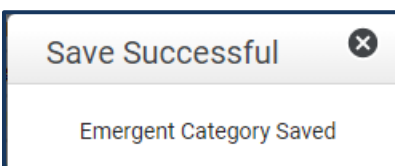
The **Emergent Description** defines the **EMERG Short Name** and/or explains the **Emergent Flash**. Enter an **Emergent Description** (any combination of up to **80** alphabetical, numerical, or special characters) that does not contain leading or ending spaces. An **Error** message appears if the **Emergent Description** is invalid or omitted.

The new **Emergent Category** is **Active** (true) by default as a selection option in the **Packet Indexing** menu and **Direct Upload** application. Remove the checkmark to render the **Emergent Flash** inactive and unavailable (Active – false) until necessary.

The **Add Emergent Category** button establishes the new **Emergent Category** in the system, while the **Cancel** button or the **X** icon stops the action and exits the window.

The **X** icon in the upper right corner of the **Save Successful** confirmation window returns to the **Admin-Emergent Categories** screen.

Figure 156: Add Emergent Category Save Successful Confirmation Window



8.5.2 Edit an Emergent Category

A single click anywhere along any row in the **Results Grid** selects that **Emergent Category** (highlighted in blue) and subsequently opens the full **Task Bar** above the **Results Grid**.

Figure 157: Select and Edit an Emergent Category

<input type="checkbox"/>	EMERG Short Name	Emergent Description	Active
<input type="checkbox"/>	HOME	Homeless Veterans	true
<input type="checkbox"/>	FINH	Claimants that are suffering from extreme financial hardship	true
<input type="checkbox"/>	AGE	More than 85 years old	true
<input type="checkbox"/>	TERM	Terminally ill claimants	true
<input type="checkbox"/>	SI/VSJ	Seriously Injured/Very Seriously Injured	true
<input type="checkbox"/>	FPOW	Former Prisoners of War and their survivors	true
<input type="checkbox"/>	BWN	Blue Water Navy	true
<input type="checkbox"/>	SUIC	Suicidal claimants	true
<input type="checkbox"/>	ALS	Diagnosed with Amyotrophic Lateral Sclerosis (ALS) or Lou Gehrig's disease	true
<input type="checkbox"/>	BLIND	Visually impaired Veterans	true
<input checked="" type="checkbox"/>	HONR	Medal of Honor/Purple Heart recipients	true

Click the **Edit** button on the **Task Bar** to make necessary revisions to the **Emergent Description** and change the **Active Emergent Flash** status (true or false) in the **Edit Emergent Category** window.

The **EMERG Short Name** cannot be edited. If the **EMERG Short Name** is incorrect, delete the inaccurate **Emergent Category** before the **Emergent Flash** is designated for a **Direct Upload** submission or new packet. The **Emergent Category** cannot be deleted after the **Emergent Flash** has been assigned. Add a new **Emergent Category** with the correct name.

Figure 158: Edit Emergent Category Window

The **Emergent Description** defines the **EMERG Short Name** and/or explains the **Emergent Flash**. Enter an **Emergent Description** (any combination of up to **80** alphabetical, numerical, or special characters) that does not contain leading or ending spaces. An **Error** message appears if the **Emergent Description** is invalid or omitted.

The **Emergent Category** is **Active** (true) as a selection option in the **Packet Indexing** menu and **Direct Upload** application when the checkbox is marked. Clear the checkbox to render the **Emergent Flash** inactive and unavailable (Active – false) as a selection option, either temporarily or permanently.

The **Save** button modifies the **Emergent Category**, while the **Cancel** button or the **X** icon stops the action and exits the window.

The **X** icon in the upper right corner of the **Save Successful** confirmation window returns to the **Admin-Emergent Categories** screen.

8.5.3 Delete an Emergent Category

A single click anywhere along any row in the **Results Grid** selects that **Emergent Category** (highlighted in blue) and subsequently opens the full **Task Bar** above the **Results Grid**.

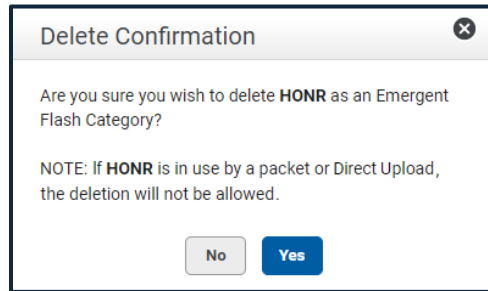
Click the **Delete** button on the **Task Bar** to eliminate the **Emergent Category** as an **Emergent Flash**.

Figure 159: Select and Delete an Emergent Category

EMERG Short Name	Emergent Description	Active
<input type="checkbox"/> HOME	Homeless Veterans	true
<input type="checkbox"/> FINH	Claimants that are suffering from extreme financial hardship	true
<input type="checkbox"/> AGE	More than 85 years old	true
<input type="checkbox"/> TERM	Terminally ill claimants	true
<input type="checkbox"/> SI/VSJ	Seriously Injured/Very Seriously injured	true
<input type="checkbox"/> FPOW	Former Prisoners of War and their survivors	true
<input type="checkbox"/> BWN	Blue Water Navy	true
<input type="checkbox"/> SUIC	Suicidal claimants	true
<input type="checkbox"/> ALS	Diagnosed with Amyotrophic Lateral Sclerosis (ALS) or Lou Gehrig's disease	true
<input type="checkbox"/> BLIND	Visually impaired Veterans	true
<input checked="" type="checkbox"/> HONR	Medal of Honor/Purple Heart recipients	true

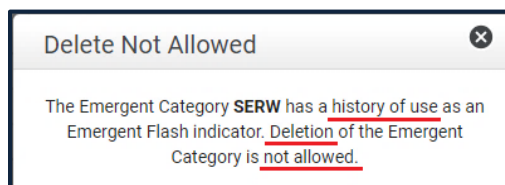
The **Yes** button in the **Delete Confirmation** window removes the **Emergent Category**, while the **No** button or the **X** icon stops the action and exits the window.

Figure 160: Delete Confirmation Window



The **Emergent Category** cannot be deleted after the **Emergent Flash** has been designated for a **Direct Upload** submission or assigned to a packet, which creates a system history record. A **Delete Not Allowed** message appears if the **Emergent Category** cannot be removed. The **X** icon in the upper right corner of the **Delete Not Allowed** window returns to the **Admin-Emergent Categories** screen.

Figure 161: Delete Not Allowed Window

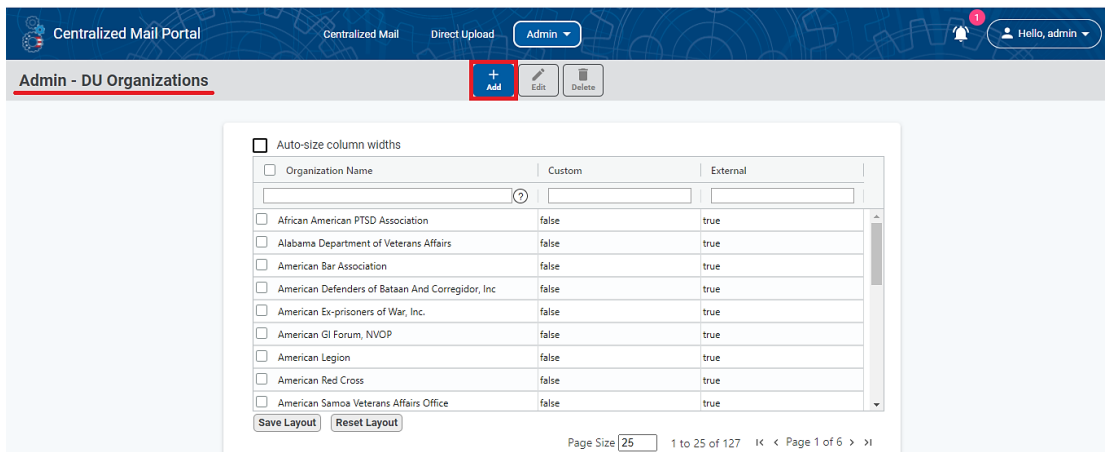


8.6 DU Organizations

Direct Upload (DU) Organizations indicate internal (VA User Role) or external (VSO User Role) organization, program, or agency affiliation for **Users** submitting Veteran benefit claims and related documentation through the **Direct Upload** application.

The **DU Organizations** option creates and edits **VA, VSO, and VA Business Partner DU Organization** entities available for assignment or selection in the **DU Organization options menus (Admin-Users Add/Editing User windows – Sections 8.2.1 and 8.2.4 and Direct Upload application – Section 3.2).**

Figure 162: Admin – DU Organizations Screen



8.6.1 Add a DU Organization

Click the **Add** button on the **Task Bar** above the **Results Grid** to display the **Add Direct Upload Organization** window.

Entries in red text fields and fields marked with an asterisk * are required. Fields shown in gray text are not editable. Fields with **Down Arrows** have an **options menu**.

Figure 163: Add Direct Upload Organization Window

The **DU Organization Name** is the nomenclature shown for the **DU Organization** in the system. Enter a **DU Organization Name** (any combination of up to **60** alphabetical, numerical, or special characters) that does not contain leading or ending spaces.

A **DU Organization Name** must be unique and cannot duplicate (case-insensitive) an existing **DU Organization Name**. An **Error** message appears if the **DU Organization Name** is invalid or omitted.

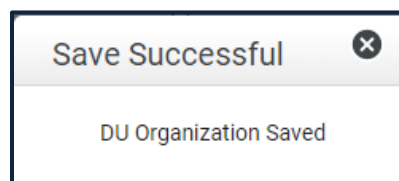
Select an **Internal** or **External Organization Type** for the **DU Organization** from the drop-down **options menu**. **Internal DU Organizations** are assigned to **VA Users/User Roles** only. **External DU Organizations** are available for selection by **VSO** and **VA Business Partner Users (VSO User Role)** in the **Direct Upload** application.

Standard is the default setting for new **DU Organizations**, which activates availability for assignment or selection in the **DU Organization options menus (Admin-Users and Direct Upload)**. **Custom DU Organizations** are not available for assignment or selection due to limited association with specific **User** accounts.

The **Add DU Organization** button establishes the new **DU Organization** in the system, while the **Cancel** button or the **X** icon stops the action and exits the window.

The **X** icon in the upper right corner of the **Save Successful** confirmation window returns to the **Admin-DU Organizations** screen.

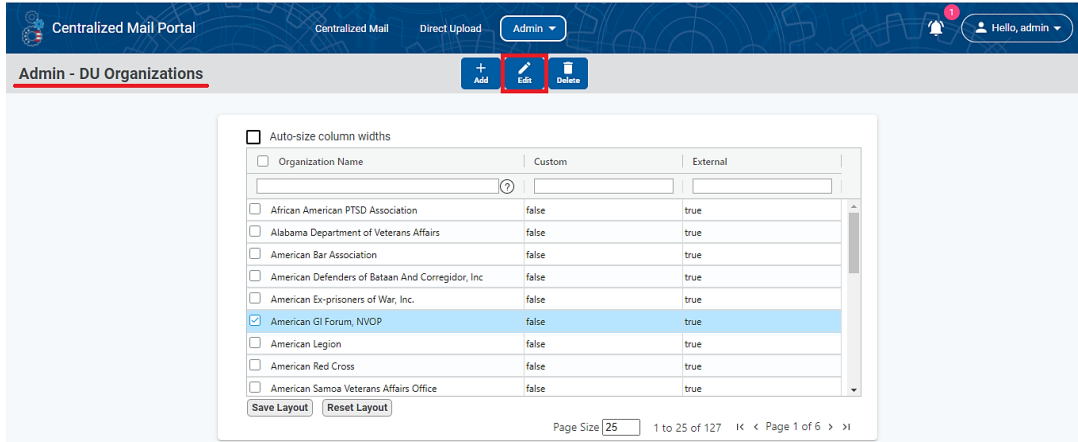
Figure 164: Add DU Organization Save Successful Confirmation Window



8.6.2 Edit a DU Organization

A single click anywhere along any row in the **Results Grid** selects that **DU Organization** (highlighted in blue) and subsequently opens the full **Task Bar** above the **Results Grid**.

Figure 165: Select and Edit a DU Organization



Click the **Edit** button on the **Task Bar** to make necessary revisions to the **DU Organization** in the **Edit Direct Upload Organization** window.

Figure 166: Edit Direct Upload Organization Window

DU Organization Name * American GI Forum, NVOP

Internal / External * External

Standard / Custom * Standard

Custom DU Organizations are unavailable for assignment to other DU users.

Required Fields *

Cancel Save

The **DU Organization Name** is the nomenclature shown for the **DU Organization** in the system. Enter a **DU Organization Name** (any combination of up to **60** alphabetical, numerical, or special characters) that does not contain leading or ending spaces.

A **DU Organization Name** must be unique and cannot duplicate (case-insensitive) an existing **DU Organization Name**. An **Error** message appears if the **DU Organization Name** is invalid or omitted.

DU Organization Name modifications update immediately in the system for association with **DU** submissions by signed in, active **Users**. **Direct Uploads** that occurred prior to the update retain and reference the assigned/selected **DU Organization Name** available at the time of submission.

Change the **Internal** or **External Organization Type** for the **DU Organization** using the drop-down **options menu**. **Internal DU Organizations** are assigned to **VA Users/User Roles** only. **External DU Organizations** are available for selection by **VSO** and **VA Business Partner Users (VSO User Role)** in the **Direct Upload** application.

The **Standard DU Organization** default setting activates availability for assignment or selection in the **DU Organization options menus (Admin-Users and Direct Upload)**. The **Custom** setting removes the **DU Organization** from the **options menus**, due to limited association with specific User accounts.

The **Save** button modifies the **DU Organization**, while the **Cancel** button or the **X** icon stops the action and exits the window.

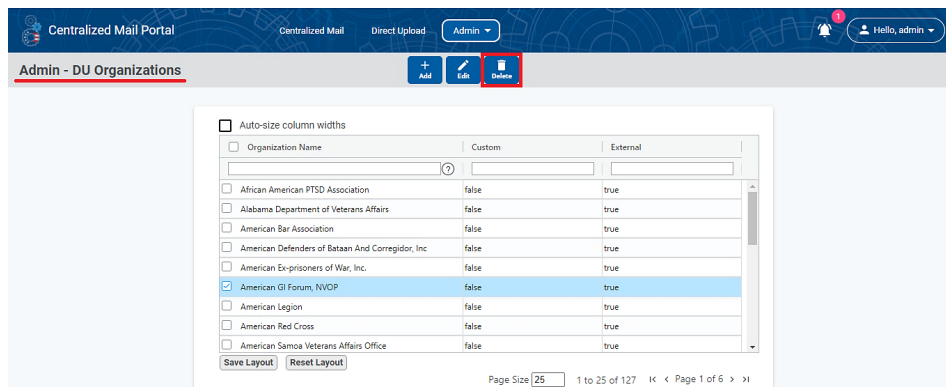
The **X** icon in the upper right corner of the **Save Successful** confirmation window returns to the **Admin-DU Organizations** screen.

8.6.3 Delete a DU Organization

A single click anywhere along any row in the **Results Grid** selects that **DU Organization** (highlighted in blue) and subsequently opens the full **Task Bar** above the **Results Grid**.

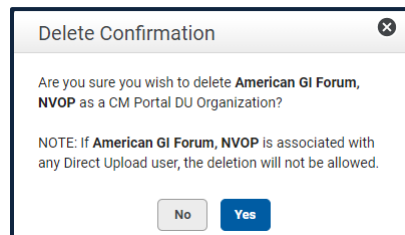
Click the **Delete** button on the **Task Bar** to eliminate the **DU Organization** from the list of valid entities.

Figure 167: Select and Delete a DU Organization



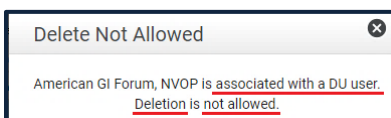
The **Yes** button in the **Delete Confirmation** window removes the **DU Organization**, while the **No** button or the **X** icon stops the action and exits the window.

Figure 168: Delete Confirmation Window



The **DU Organization** cannot be deleted if an association exists with a **Direct Upload User**. A **Delete Not Allowed** message appears if the **DU Organization** cannot be removed. The **X** icon in the upper right corner of the **Delete Not Allowed** window returns to the **Admin-DU Organizations** screen.

Figure 169: Delete Not Allowed Window



9 Watermarks

A standard watermark is included on all images, which lists the **Received Date** at the conversion **Vendor** site and its location.

Figure 170: 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 171: Best Copy Watermark

BEST COPY

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

Figure 172: 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 **Received Date** at the conversion **Vendor** site, and a **PMR Program Referred** designation.

Figure 173: PMR Watermark

ScanDate: 09/25/2014 – PMR PROGRAM REFERRED

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

Figure 174: Full PMR Watermark

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

Appendix A – Acronyms

This list contains all acronyms and abbreviations used in this document, along with their definitions.

Acronym	Definition
AC&L	Approval, Compliance, and Liaison
ADMIN	Administration
AE	Auto-Establish/AutoCEST (Automatic Claim[s] Establishment)
a.m.	Ante Meridiem – derived from Latin and meaning “before noon”
AMA	Veterans Appeals Improvement and Modernization Act of 2017 – also known as the Appeals Modernization Act
API	Application Programming Interface – Benefits Intake
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 Incorporated
CM	Centralized Mail
com	Commercial
COR	Contracting Officer's Representative
CSRA	Computer Systems Research and Applications Corporation
CSRAFCS	CSRA File Conversion Services
CSV	Comma-Separated Values – a simple file format used to store tabular data in plain text (e.g., spreadsheet)
CT	Central Time
CTRL	Control
D2D	Digits-to-Digits – service for direct submission of electronic Veteran benefit claims from VSO claims management systems to the VBMS
DD	Day of the month expressed with two (2) digits
DMC	Debt Management Center(s)
DMHS	Digitized Mail Handling Services
DROC	Decision Review Operations Center(s)
DU	Direct Upload

Acronym	Definition
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 Flashes
EMMS	Electronic Mail Management Services – Fax, API, NCC, FFS
ET	Eastern Time
etc.	<i>et cetera</i> – in Latin means “and the rest” (Anglicized definition – “and others” or “and so forth”)
FAQ	Frequently Asked Question(s)
FFS	Fugitive Felon Status (Fugitive Felon Program – FFP)
GCIO	Government Chief Information Officer, LLC
GCIOEM	GCIO Electronic Mail
gov	Government
HEC	Health Eligibility Center – VHA
HIL	Human in the Loop
HLP	HLP Integration, LLC
HLR	Higher-Level Review
https	Hypertext Transfer Protocol Secure
ID	Identification
Inc.	Incorporated
INFO	Information
IP	Internet Protocol
LLC	Limited Liability Company
LOB	Line of Business
MA	Mail Automation
MAS	Mail Automation Services
MAS-HIL	Mail Automation Services-Human in the Loop
MB	Megabyte(s)
MCL	Master Category List
MM	Month expressed with two (2) digits
N	No
NCA	National Cemetery Administration

Acronym	Definition
NCC	National Call Center(s)
NDAA	National Defense Authorization Act
NOD	Notice of Disagreement
NPRC	National Personnel Records Center(s)
NVF	No Veteran Found
OA	Oversight and Accountability – Education Service
OAR	Office of Administrative Review
OBPI	Office of Business Process Integration
OMPF	Official Military Personnel File(s)
OTED	Office of Transition and Economic Development
PCAFC	Program of Comprehensive Assistance for Family Caregivers
PDF	Portable Document Format
PII	Personally Identifiable Information
PIN	Personal Identification Number
PIV	Personal Identity Verification
p.m.	Post Meridiem – derived from Latin and meaning “after noon”
PMC	Pension Management Center(s)
PMCMS	Paper Mail Conversion and Management Services
PMR	Private Medical Record(s)
POM	Payment Operations and Management – VHA Office of Community Care
QA	Quality Assurance
QS	Quick Submit
RACC	Restricted Access Claims Center(s)
RFI	Request for Information
RM	Returned Mail
RMC	Records Management Center(s)
RMO	Records Management Officer(s)
RO	Regional Office(s)
RPO	Regional Processing Office(s)
SC	Supplemental Claim

Acronym	Definition
SMS	Systems Made Simple, a Leidos Company
SPI	Sensitive Personal Information
SSD	Support Services Division
SSN	Social Security Number(s)
SSOe	Single Sign-On External
SSOi	Single Sign-On Internal
UAM	User Access Management
UI	User Interface
UM	Unidentified/Unidentifiable Mail
U.S. or US	United States
VA	Department of Veterans Affairs
VBA	Veterans Benefits Administration
VBMS	Veterans Benefits Management System
VCIP	Veterans Claims Intake Program
VFMP	Veteran Family Member Programs – VHA Office of Community Care
VHA	Veterans Health Administration
VPN	Virtual Private Network
VRE	Veteran Readiness and Employment (formerly Vocational Rehabilitation and Employment)
VSO	Veterans Service Organization(s)
XLSM	Microsoft Excel Macro-Enabled Document 2007–Present file format
Y	Yes
YYYY	Year expressed with four (4) digits

Appendix B – Previous Version History

Previous Version History lists CM Portal User and Training Manual Version information prior to the current **Version History** (Page ii).

Date	Version	Description	Author
12/04/2018	1.0	Initial Document Release	Team SMS/Leidos
05/08/2019	1.1	Removed CM Portal Help Desk phone number	Team SMS/Leidos
06/07/2019	1.2	<ul style="list-style-type: none"> Added Sections 2.4 and 3.5 for System Notifications Included instructions for the calendar selector in Section 6.2.2.6.2 	Team SMS/Leidos
06/26/2019	1.3	<ul style="list-style-type: none"> Revised Sections 8.1.1–8.1.2 on Queue Type and Menu Item Permissions when adding or editing User Roles Added Section 8.2.2 for Bulk Add Multiple Users 	Team SMS/Leidos
07/26/2019	1.4	Added Section 6.2.1.1 for Results Grid Columns	Team SMS/Leidos
08/23/2019	1.5	<ul style="list-style-type: none"> Defined System Administrator responsibility in Section 4 Revised Section 6.2.2.6 for Results Grid Sorting Revised Section 7.3.13 for the Retrigger Button Updated Section 8.3.1 for Add a Location attributes Revised Section 8.3.3 to Delete a Location 	Team SMS/Leidos
10/25/2019	1.6	Revised Sections 2–2.1 for Accessing the CM Portal with Single Sign-On	Team SMS/Leidos
03/08/2020	1.7	<ul style="list-style-type: none"> Added Section 1.4 for Information Security and Privacy Enhanced the National Reviewer User Role in Section 4.6 Revised Admin Sections 8.2.1, 8.2.3, and 8.2.4 for adding, searching, viewing, and editing Users 	Team SMS/Leidos
04/26/2020	1.8	<ul style="list-style-type: none"> Added Section 6.2.2.3 for Results Grid Customization Revised Admin Sections 8.3.1 and 8.3.2 for adding and editing a Location 	Team SMS/Leidos
06/07/2020	1.9	<ul style="list-style-type: none"> Revised User Roles in Sections 4.1–4.8 Updated Page Navigation and Display Controls in Section 5.3 and the Packet Detail Menu in Section 7.2 Modified Admin Section 8.3.2 for editing a Location 	Team SMS/Leidos

Date	Version	Description	Author
07/19/2020	1.10	<ul style="list-style-type: none"> • Added Section 4.9.1 for the Hold Queue • Augmented the Results Grid Columns in Section 6.2.1.1 • Updated Packet Actions Task Bar Button function information in Sections 7.3.1–7.3.4 and 7.3.7–7.3.13 • Expanded User Role Menu Item Permissions in Sections 8.1.1 and 8.1.2 • Revised Sections 8.2.1 and 8.2.4 to Add and Edit a User • Modified Section 8.2.2 for Bulk Add Multiple Users 	Team SMS/Leidos
08/16/2020	1.11	<ul style="list-style-type: none"> • Removed Decision Ready Claims application references throughout the User and Training Manual • Updated the CM Portal Access Requirements in Section 1.2 • Expanded User Roles, Permissions, and Queues in Section 4 • Enhanced the Export Option in Section 6.3.5 • Modified the Split Button process in Section 7.3.9 and History Button functions in Section 7.3.15 • Revised the Bulk Add Microsoft Excel File Template for Creating the CSV File in Section 8.2.2.1.1 • Added Section 8.4 for Organizations 	Team SMS/Leidos
10/18/2020	1.12	<ul style="list-style-type: none"> • Updated the CM Portal Access Requirements in Section 1.2 • Enhanced the Queue Hierarchy in Section 6.1 • Added Data Changed Alerts to the Packet Detail Menu in Section 7.2 • Modified Reassign Button functions in Section 7.3.7 • Expanded User Role Menu Item Permissions in Sections 8.1.1 and 8.1.2 • Revised Sections 8.2.1 and 8.2.4 to Add and Edit a User • Updated the Bulk Add Microsoft Excel File Template for Creating the CSV File in Section 8.2.2.1.1 • Altered Sections 8.3.1 and 8.3.2 to Add and Edit a Location • Added Section 8.4 for Trigger Documents 	Team SMS/Leidos

Date	Version	Description	Author
12/06/2020	1.13	<ul style="list-style-type: none"> • Inserted new Section 1.4 for CM Portal Account Deactivation • Revised Table 2 in Section 6.4 to add Packet Status “Hold” and change Packet Status “Do Not Upload” to “Download Confirmed” (also in Section 7.3.11) • Augmented the menu fields and enhanced modification properties for Packet Indexing in Section 7.2.2 and Document Indexing in Section 7.2.3 • Clarified Return Button functions in Section 7.3.3 • Modified Rescan Button functions in Section 7.3.8 • Updated the Bulk Add Microsoft Excel File Template for Creating the CSV File in Section 8.2.2.1.1 • Increased Add a Location selectable attributes in Section 8.3.1 	Team SMS/Leidos
01/24/2021	1.14	<ul style="list-style-type: none"> • Enhanced the Contracting Officer’s Representative (COR) User Role in Section 4.8 • Revised the Bulk Add Microsoft Excel File Template for Creating the CSV File in Section 8.2.2.1.1 • Updated Section 8.4 for Trigger Documents 	Team SMS/Leidos
02/21/2021	1.15	<ul style="list-style-type: none"> • Enhanced the Contracting Officer’s Representative (COR) User Role in Section 4.8 • Augmented the Results Grid Columns in Section 6.2.1.1 • Amended CM Packet Status Values in Section 6.4 • Updated Section 7.2.2 for Packet Indexing • Modified the Rescan Button and Split Button request unavailability instances in Sections 7.3.8 and 7.3.9 • Clarified Sections 8.2.1 and 8.2.4 to Add and Edit a User • Revised the Bulk Add Microsoft Excel File Template for Creating the CSV File in Section 8.2.2.1.1 • Added Section 8.5 for Emergent Categories 	Team SMS/Leidos
03/21/2021	1.16	<ul style="list-style-type: none"> • Updated Section 7.2.3 for Document Indexing • Revised the Bulk Add Microsoft Excel File Template for Creating the CSV File in Section 8.2.2.1.1 	Team SMS/Leidos

Date	Version	Description	Author
04/25/2021	1.17	<ul style="list-style-type: none"> • Inserted new Section 1.5 for Low Vision Accessibility • Changed document title for Veterans Service Organization (VSO) User and Training Manual to Direct Upload (DU) User and Training Manual • Expanded the Basic User Role in Section 4.1 and the Super User Role in Section 4.3 • Enhanced Column Resizing in Section 6.2.2.4 • Revised Section 6.2.2.6 for Results Grid Sorting • Adjusted Search Options Symbols functionality in Section 6.2.2.7.1 • Clarified Search Criteria in Section 6.3.1 • Modified the Approve, Rescan, and Split Button processes in Sections 7.3.1, 7.3.8, and 7.3.9 • Renamed Automatic Mode to Automatic Workflow Mode in Section 7.4 and explained Automatic Workflow Mode Only in new Section 7.4.1 • Added Section 7.5 for Manual Internal Split • Augmented User Role Menu Item Permissions in Sections 8.1.1 and 8.1.2 • Updated the Bulk Add Microsoft Excel File Template for Creating the CSV File in Section 8.2.2.1.1 • Increased Add a Location selectable attributes in Section 8.3.1 	Team SMS/Leidos
05/23/2021	1.18	<ul style="list-style-type: none"> • Changed the Version History to reflect the most recent Versions of the CM Portal User and Training Manual • Expanded the Basic User Role in Section 4.1 and the Super User Role in Section 4.3 • Augmented the Results Grid Columns and revised the VA DOR definition in Section 6.2.1.1 • Clarified Search Options Symbols and Search Criteria functionality in Sections 6.2.2.7.1 and 6.3.1 • Noted that the Auto-Establish process was discontinued in Sections 7.2.1 and 7.2.3 • Revised the Received Date-VA DOR relationship for Document Indexing in Section 7.2.3 • Enhanced the Split Button process in Section 7.3.9 • Updated Section 7.5 for Manual Internal Split • Added Appendix B for Previous Version History prior to the current Version History 	Team SMS/Leidos
06/27/2021	1.19	<ul style="list-style-type: none"> • Updated Section 6.2.2.6 for Results Grid Sorting • Clarified Search Options Symbols and Search Criteria functionality in Sections 6.2.2.7.1, 6.3.1, and 8.2.3 • Amended CM Packet Status Values in Section 6.4 	Team SMS/Leidos

Date	Version	Description	Author
07/25/2021	1.20	<ul style="list-style-type: none"> • Revised CM Portal Access Requirements in Section 1.2 • Added Section 1.7 for CM Portal Terms of Use • Updated the Bulk Add Microsoft Excel File Template for Creating the CSV File in Section 8.2.2.1.1 	Team SMS/Leidos
08/29/2021	1.21	<ul style="list-style-type: none"> • Modified CM Portal Account Deactivation Pending Notice in Section 1.4 • Added Section 2.4 for Frequently Asked Questions (FAQ) • Inserted new Section 4.2 for Basic User + Automatic Assignment Role • Added Section 4.9.2 for Work Queue – Automatic Packet Assignment • Expanded User Role Menu Item Permissions in Sections 8.1.1 and 8.1.2 • Updated the Bulk Add Microsoft Excel File Template for Creating the CSV File in Section 8.2.2.1.1 • Increased Add a Location selectable attributes in Section 8.3.1 	Team SMS/Leidos