

Delivery Operations Claims Management Platform (DOCMP) – Pega

Software Version 1.0

User Guide



January 2024

Department of Veterans Affairs

Office of Information and Technology (OIT)

Revision History

NOTE: The revision history cycle begins once changes or enhancements are requested after the document has been baselined.

| Date | Revision | Description | Author |
|------------|----------|------------------|--------|
| 01/18/2024 | 1.0 | Initial Release. | VetsEZ |

Artifact Rationale

Per the Veteran-focused Integrated Process (VIP) Guide, the User's Guide is required to be completed prior to Critical Decision Point #2 (CD2), with the expectation that it will be updated as needed. A User Guide is a technical communication document intended to give assistance to people using a particular system, such as VistA end users. It is usually written by a technical writer, although it can also be written by programmers, product or project managers, or other technical staff. Most user guides contain both a written guide and the associated images. In the case of computer applications, it is usual to include screenshots of the human-machine interfaces, and hardware manuals often include clear, simplified diagrams. The language used is matched to the intended audience, with jargon kept to a minimum or explained thoroughly. The User Guide is a mandatory, build-level document, and should be updated to reflect the contents of the most recently deployed build. The sections documented herein are required if applicable to your product.

Table of Contents

| | |
|--|-----------|
| 1. Introduction | 1 |
| 1.1. Purpose | 1 |
| 1.2. Document Orientation | 1 |
| 1.2.1. Organization of the User Guide..... | 1 |
| 1.2.2. Assumptions | 2 |
| 1.2.3. Disclaimers..... | 2 |
| 1.2.3.1. Software Disclaimer | 2 |
| 1.2.3.2. Documentation Disclaimer | 2 |
| 1.2.4. Documentation Conventions..... | 2 |
| 1.3. Enterprise Service Desk and Organizational Contacts | 3 |
| 2. System Summary | 4 |
| 2.1. Configuration..... | 4 |
| 2.2. Data Flows..... | 4 |
| 2.3. User Access Levels | 5 |
| 2.4. Continuity of Operation..... | 5 |
| 3. Getting Started | 5 |
| 3.1. Logging On..... | 5 |
| 3.2. System Menu | 6 |
| 3.2.1. Home Page Overview..... | 6 |
| 3.2.2. User Role Functionality | 8 |
| 3.2.2.1. Read-Only User | 8 |
| 3.2.2.2. EEV Contact Representatives | 9 |
| 3.2.2.3. EEV Supervisor..... | 10 |
| 3.2.2.4. EEV Supervisor Dashboard Overview..... | 11 |
| 3.2.2.5. OHI Supervisor | 14 |
| 3.2.2.6. OHI Supervisor Dashboard Overview | 15 |
| 3.2.2.7. OHI Voucher Examiner | 17 |
| 3.3. Logging Off..... | 18 |
| 4. Using the Software | 19 |
| 4.1. Conducting a Search..... | 19 |
| 4.2. Viewing Documents | 21 |
| 4.2.1. Document Details Functions..... | 22 |
| 4.2.1.1. Viewing Related Documents..... | 22 |

| | | |
|-----------|---|-----------|
| 4.2.1.2. | Auditing Documents | 23 |
| 4.2.1.3. | Escalating Documents | 23 |
| 4.3. | Assigning Cases | 24 |
| 4.3.1. | Assigning Cases in the Work Queue | 24 |
| 4.3.2. | Assigning Cases in the Work List | 25 |
| 4.4. | Pulling Reports | 26 |
| 4.4.1. | Exporting Reports | 27 |
| 4.5. | Editing Cases | 28 |
| 4.5.1. | Bulk Editing Cases | 30 |
| 4.6. | Working with OHI Certificates | 31 |
| 4.6.1. | Self-Assign a Document | 31 |
| 4.6.2. | View and Update OHI Certificates | 32 |
| 5. | Appendix A: Acronyms and Abbreviations | 34 |

Table of Figures

| | | |
|------------|--|----|
| Figure 1: | DOCMP – Pega Data Flow Diagram | 4 |
| Figure 2: | DOCMP – Pega Login Page | 6 |
| Figure 3: | DOCMP - Pega Home Page | 6 |
| Figure 4: | DOCMP - Pega Dashboard | 7 |
| Figure 5: | DOCMP - Pega Application Header | 7 |
| Figure 6: | DOCMP - Pega Tabs | 7 |
| Figure 7: | DOCMP - Pega Sidebar Navigation | 8 |
| Figure 8: | Default Read-Only User Screen | 8 |
| Figure 9: | EEV Contact Representative Dashboard Example | 9 |
| Figure 10: | EEV Supervisor Dashboard | 10 |
| Figure 11: | EEV Supervisor Dashboard - Daily Workload Report | 11 |
| Figure 12: | EEV Supervisor Dashboard – Work Queue | 12 |
| Figure 13: | EEV Supervisor Dashboard – Work List | 13 |
| Figure 14: | Default OHI Supervisor User Screen | 14 |
| Figure 15: | OHI Supervisor Dashboard – Work Queue | 15 |
| Figure 16: | OHI Supervisor Dashboard – Work List | 16 |
| Figure 17: | Default OHI Voucher Examiner Screen | 17 |
| Figure 18: | User Profile drop-down menu | 18 |
| Figure 19: | DOCMP - Pega Search Options Tab | 19 |
| Figure 20: | DOCMP - Pega Search Option Entry | 20 |
| Figure 21: | DOCMP - Pega Search Results | 21 |
| Figure 22: | EEV Contact Representative Dashboard | 21 |
| Figure 23: | Document Details Tab | 22 |

| | |
|--|----|
| Figure 24: Document Details - Related Function | 23 |
| Figure 25: Document Details - Audit Function | 23 |
| Figure 26: Document Details – Escalate Confirmation Dialog Box..... | 24 |
| Figure 27: Unassigned Work Queue | 24 |
| Figure 28: Assigned Document Confirmation Message..... | 25 |
| Figure 29: Assigned Work List..... | 25 |
| Figure 30: Work List – Assign To Selection..... | 26 |
| Figure 31: Report Browser Tab..... | 26 |
| Figure 32: Report Details Tab | 27 |
| Figure 33: EEV Contact Representative User Dashboard | 28 |
| Figure 34: EEV Contact Representative Document Details Tab (1 of 2) | 28 |
| Figure 35: EEV Contact Rep Document Details Tab (2 of 2) - Additional Details View | 29 |
| Figure 36: Save Confirmation | 29 |
| Figure 37: User Work List Selected Cases | 30 |
| Figure 38: Bulk Edits Dialog Box..... | 30 |
| Figure 39: OHI Voucher Examiner Dashboard | 31 |
| Figure 40: Self-assign Confirmation..... | 32 |
| Figure 41: OHI Document Details Tab (1 of 2)..... | 32 |
| Figure 42: OHI Document Details Tab (2 of 2) - Additional Details View..... | 33 |
| Figure 43: OHI Document Save Confirmation..... | 33 |

1. Introduction

The Delivery Operations Claims Management Platform (DOCMP) – Pega is a tool designed to provide the Department of Veterans Affairs (VA) with a way to receive, track, and archive incoming documents. It enables Veteran Family Medical Programs (VFMP) to process intakes of new beneficiary applications, process, and review reimbursement claims, and logs the documents' history once it is scanned into the VA system. These all enable VFMP to file and reimburse Veterans and their beneficiaries in a timely manner.

1.1. Purpose

The purpose of this document is to provide simple and comprehensive instructions for using the DOCMP – Pega user interface (UI) screens.

1.2. Document Orientation

The Delivery Operations Claims Management Platform (DOCMP) - Pega v1.0 User Guide will provide explanations of each screen and of all user interface options within the context of an easy-to-understand demonstration data scenario.

This document is also designed to provide the user with screen-by-screen “how to” information on the usage of DOCMP - Pega.

1.2.1. Organization of the User Guide

- **Section 1: Introduction**

This section provides the purpose of this manual, an overview of the DOCMP – Pega software, disclaimers, conventions, and contact information for the user to seek additional information.

- **Section 2: System Summary**

This section provides a graphical representation of the DOCMP – Pega data flow and an explanation of the application's user access levels.

- **Section 3: Getting Started**

This section provides initial steps to register a user with DOCMP – Pega, as well as a general walkthrough of the system from initiation through exit, enabling the user to understand the sequence and flow of the system.

- **Section 4: Using the Software**

This section provides users with step-by-step instructions on how to complete operations in DOCMP – Pega.

- **Appendix A: Acronyms and Abbreviations**

This section provides a list of acronyms and abbreviations found in this document.

1.2.2. Assumptions

This guide was written with the following assumed experience/skills of the audience:

- Users have been provided with the appropriate active roles and access to the DOCMP – Pega web application.
- Users have completed any prerequisite training on the DOCMP – Pega web application.

1.2.3. Disclaimers

1.2.3.1. Software Disclaimer

This software was developed at the Department of Veterans Affairs (VA) by employees of the Federal Government in the course of their official duties. Pursuant to title 17 Section 105 of the United States Code this software is not subject to copyright protection and is in the public domain. VA assumes no responsibility whatsoever for its use by other parties, and makes no guarantees, expressed or implied, about its quality, reliability, or any other characteristic. We would appreciate acknowledgement if the software is used. This software can be redistributed and/or modified freely if any derivative works bear some notice that they are derived from it, and any modified versions bear some notice that they have been modified.

1.2.3.2. Documentation Disclaimer

The appearance of external hyperlink references in this manual does not constitute endorsement by the Department of Veterans Affairs (VA) of this Web site or the information, products, or services contained therein. The VA does not exercise any editorial control over the information you may find at these locations. Such links are provided and are consistent with the stated purpose of the VA.

1.2.4. Documentation Conventions

This guide uses the following methods to highlight different aspects of the material.

Table 1: Documentation Symbols and Descriptions

| Symbol | Description |
|---------------|--|
| NOTE: | Informs the reader of generally useful information related to the topic. |
| TIP: | Contains useful information for accomplishing specific tasks. |

1.3. Enterprise Service Desk and Organizational Contacts

For issues related to DOCMP – Pega that cannot be resolved by this guide or the site administrator, please contact the Enterprise Service Desk (ESD).

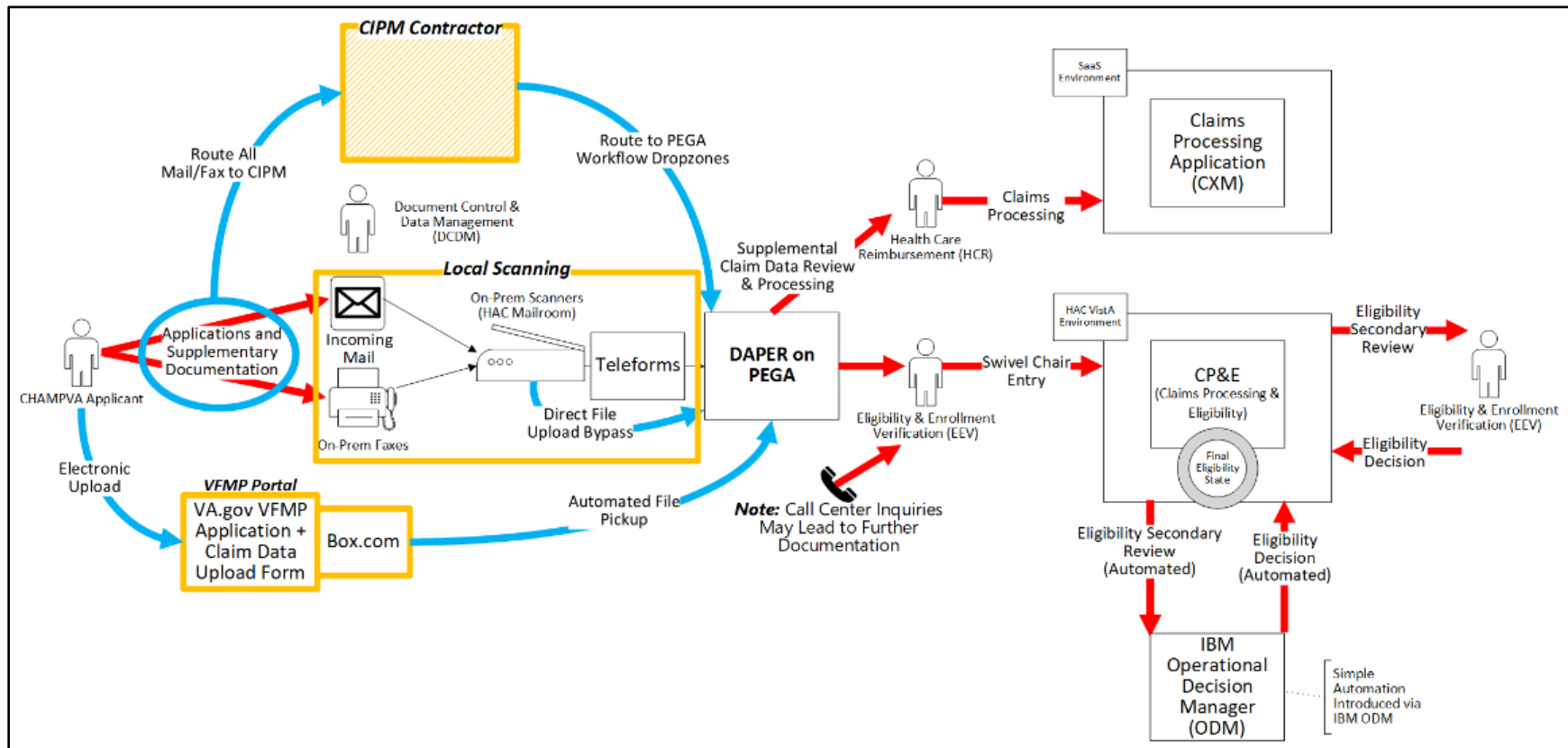
2. System Summary

2.1. Configuration

DOCMP – Pega is accessed using a secure web browser and a secure Virtual Private Network (VPN).

2.2. Data Flows

Figure 1: DOCMP – Pega Data Flow Diagram



2.3. User Access Levels

The access to each feature in DOCMP – Pega is aligned to user roles and responsibilities. Some features included in this User Guide will not be visible or available to all users. There are five DOCMP – Pega user access levels:

- **VFMP Read-Only:** This user type can only search and view documents and is unable to make any updates or submissions.
- **Eligibility, Enrollment, and Verification (EEV) Contact Representatives:** EEV Contact Representatives can use DOCMP – Pega to edit their assigned cases, view attachments to enter the beneficiary's demographics into Veterans Health Information Systems and Technology Architecture (VistA) and notate determination information.
- **EEV Supervisor:** EEV Supervisors can use DOCMP – Pega to assign eligibility cases to their team members as well as generate reports on a variety of case-related information.
- **Office of Health Information (OHI) Supervisor:** OHI Supervisors can use DOCMP – Pega to assign cases to their team members.
- **OHI Voucher Examiner:** OHI Voucher Examiners from the Review and Resolution Department (R&R) can use DOCMP – Pega to see the incoming OHI Certificates for applicants that are already entered into VistA and finalize their insurance eligibility.

2.4. Continuity of Operation

The VA Enterprise Cloud (VAEC) handles the Continuity of Operations.

3. Getting Started

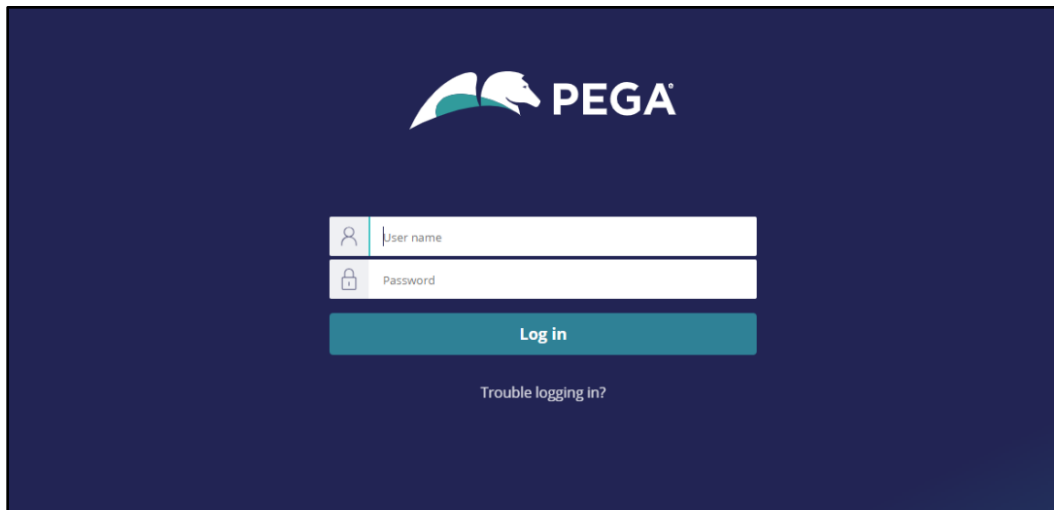
This section describes the process of gaining access to the DOCMP – Pega application and walks through the application from initiation to exit.

3.1. Logging On

To log on to the DOCMP – Pega application, users first must authenticate their Personal Identity Verification (PIV) card and sign on to the VA network. After users have completed the authentication process, they can access the DOCMP – Pega site.

1. Navigate to the [DOCMP - Pega](#) URL. The **DOCMP – Pega Login Page** displays.

Figure 2: DOCMP – Pega Login Page



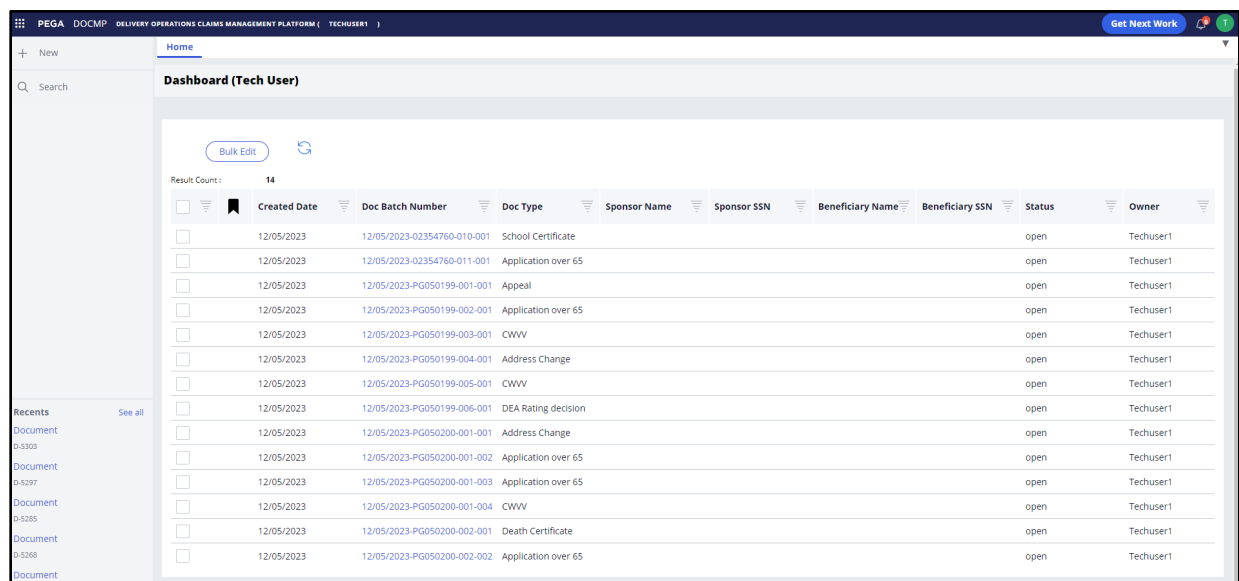
2. Enter your **User name** and **Password**.
3. Select **Log in**.

3.2. System Menu

The DOCMP – Pega application offers different menu options for the functions specific to each user role: **VFMP Read-only User**, **EEV Contact Representatives**, **EEV Supervisor**, **OHI Supervisor**, and **OHI Voucher Examiner**. Once you have been assigned your role, you will be able to access its functions.

3.2.1. Home Page Overview

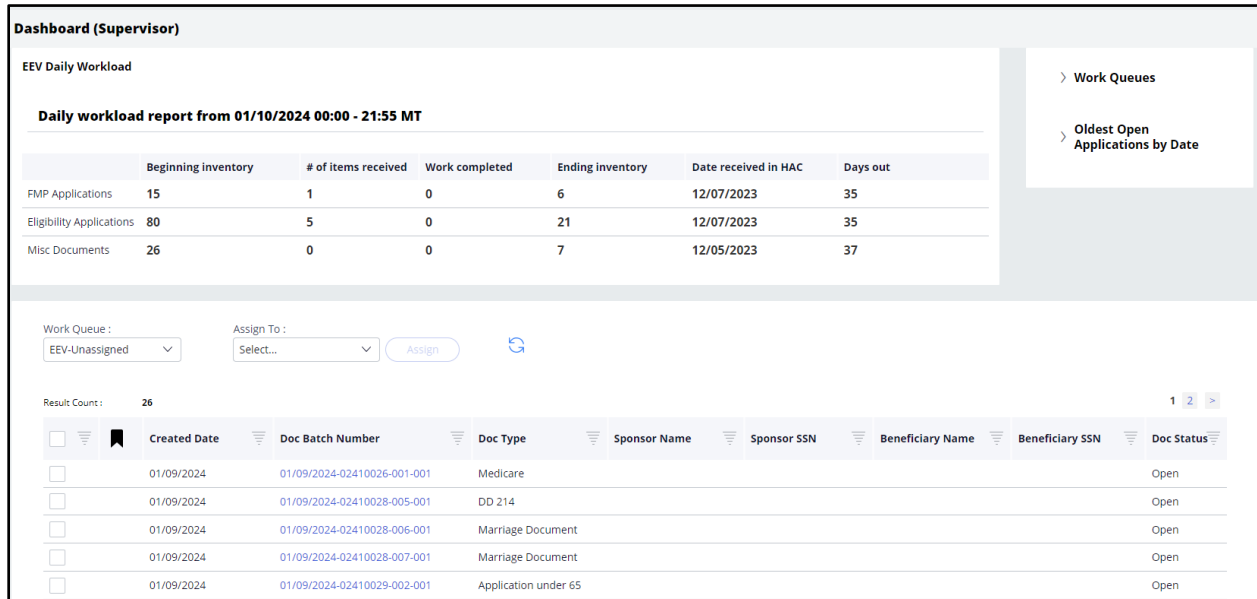
Figure 3: DOCMP - Pega Home Page



The DOCMP - Pega home page contains some general elements that are common to all user views:

- **Dashboard** - is the main content area of the application and displays content in individual tabs based on what the user has selected.

Figure 4: DOCMP - Pega Dashboard



- **Application Header** - at the top of the page. Displays the application name and the role type of the active user. The header also includes the **Get Next Work** button, the notifications icon, and the user profile icon.

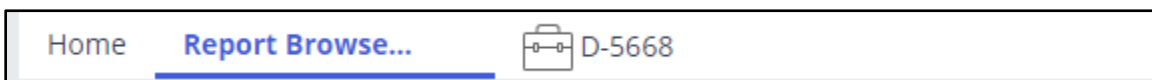
NOTE: Notifications are not currently enabled at this time, but this feature will be available with a future release.

Figure 5: DOCMP - Pega Application Header



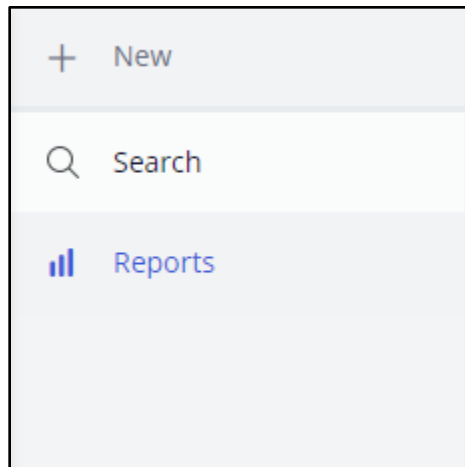
- **Tabs** – below the **Application Header**. Displays the active content on the dashboard. When a new action is taken (e.g., selecting a document selection or conducting a search) a new tab will open.

Figure 6: DOCMP - Pega Tabs



- **Sidebar Navigation** – located on the left side of the page. Lists the operations available for each role type.

Figure 7: DOCMP - Pega Sidebar Navigation

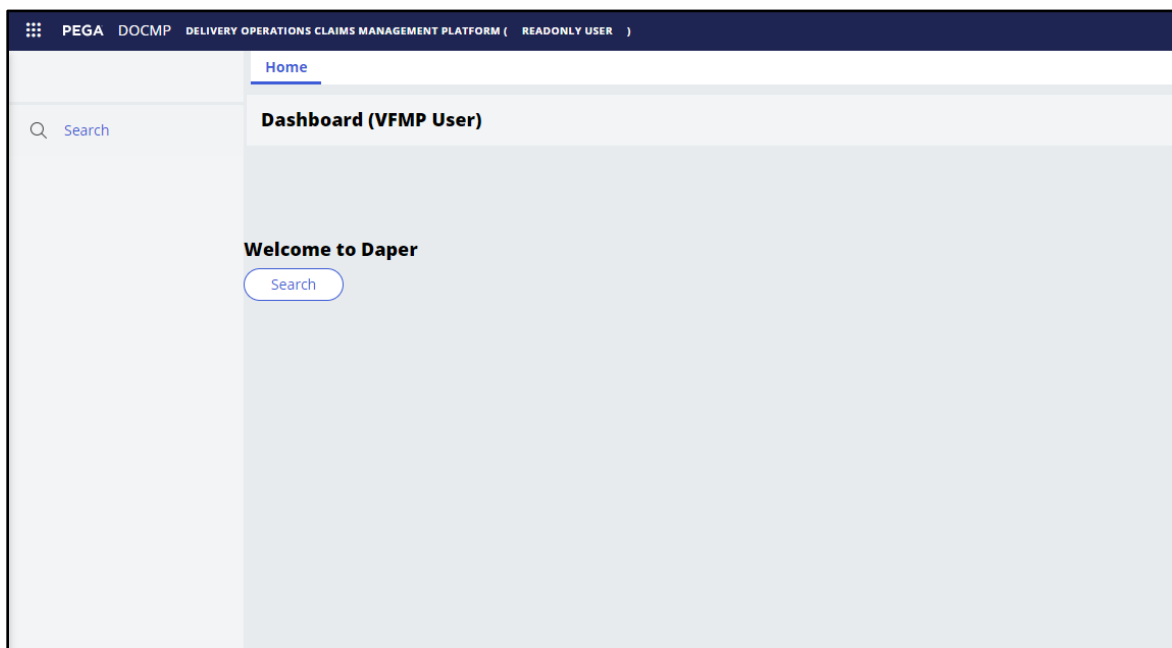


3.2.2. User Role Functionality

3.2.2.1. Read-Only User

Read-only users may only run searches and view documents within the application and cannot make any changes or updates.

Figure 8: Default Read-Only User Screen



3.2.2.2. EEV Contact Representatives

Users with the EEV Contact Representative role can view and edit the documents that have been assigned to them in DOCMP - Pega. After logging into the application, the EEV Contact Representative Dashboard displays. Their dashboard displays a table of work items that have been assigned to them.

Figure 9: EEV Contact Representative Dashboard Example

Dashboard (Tech User)

Bulk Edit

Result Count: 14

| | Created Date | Doc Batch Number | Doc Type | Sponsor Name | Sponsor SSN | Beneficiary Name | Beneficiary SSN | Status | Owner |
|--------------------------|--------------|-----------------------------|---------------------|--------------|-------------|------------------|-----------------|--------|-----------|
| <input type="checkbox"/> | 12/05/2023 | 12/05/2023-02354760-010-001 | School Certificate | | | | | open | Techuser1 |
| <input type="checkbox"/> | 12/05/2023 | 12/05/2023-02354760-011-001 | Application over 65 | | | | | open | Techuser1 |
| <input type="checkbox"/> | 12/05/2023 | 12/05/2023-PG050199-001-001 | Appeal | | | | | open | Techuser1 |
| <input type="checkbox"/> | 12/05/2023 | 12/05/2023-PG050199-002-001 | Application over 65 | | | | | open | Techuser1 |
| <input type="checkbox"/> | 12/05/2023 | 12/05/2023-PG050199-003-001 | CWV | | | | | open | Techuser1 |
| <input type="checkbox"/> | 12/05/2023 | 12/05/2023-PG050199-004-001 | Address Change | | | | | open | Techuser1 |
| <input type="checkbox"/> | 12/05/2023 | 12/05/2023-PG050199-005-001 | CWV | | | | | open | Techuser1 |
| <input type="checkbox"/> | 12/05/2023 | 12/05/2023-PG050199-006-001 | DEA Rating decision | | | | | open | Techuser1 |
| <input type="checkbox"/> | 12/05/2023 | 12/05/2023-PG050200-001-001 | Address Change | | | | | open | Techuser1 |
| <input type="checkbox"/> | 12/05/2023 | 12/05/2023-PG050200-001-002 | Application over 65 | | | | | open | Techuser1 |
| <input type="checkbox"/> | 12/05/2023 | 12/05/2023-PG050200-001-003 | Application over 65 | | | | | open | Techuser1 |
| <input type="checkbox"/> | 12/05/2023 | 12/05/2023-PG050200-001-004 | CWV | | | | | open | Techuser1 |
| <input type="checkbox"/> | 12/05/2023 | 12/05/2023-PG050200-002-001 | Death Certificate | | | | | open | Techuser1 |
| <input type="checkbox"/> | 12/05/2023 | 12/05/2023-PG050200-002-002 | Application over 65 | | | | | open | Techuser1 |

Contact Representative users have access to the following functions:

- **Search:** This button is located within the sidebar navigation and when selected, will open a new tab allowing the user to choose from a variety of options to refine their search of available documents.
- **Recents:** Also accessed from the sidebar navigation and lists the user's most recently accessed documents.
- **Get Next Work:** This button is in the header at the top of the page. When selected, it opens the user's next work item in a new tab.
- **Bulk Edit:** Located above the work list, this button allows the user to select multiple cases and update them all with the same information or action.
- **Refresh button:** This button allows the user to refresh the list to view the most recent items.

The **Work Queue** lists all items that have been assigned to the user and contains the following fields:

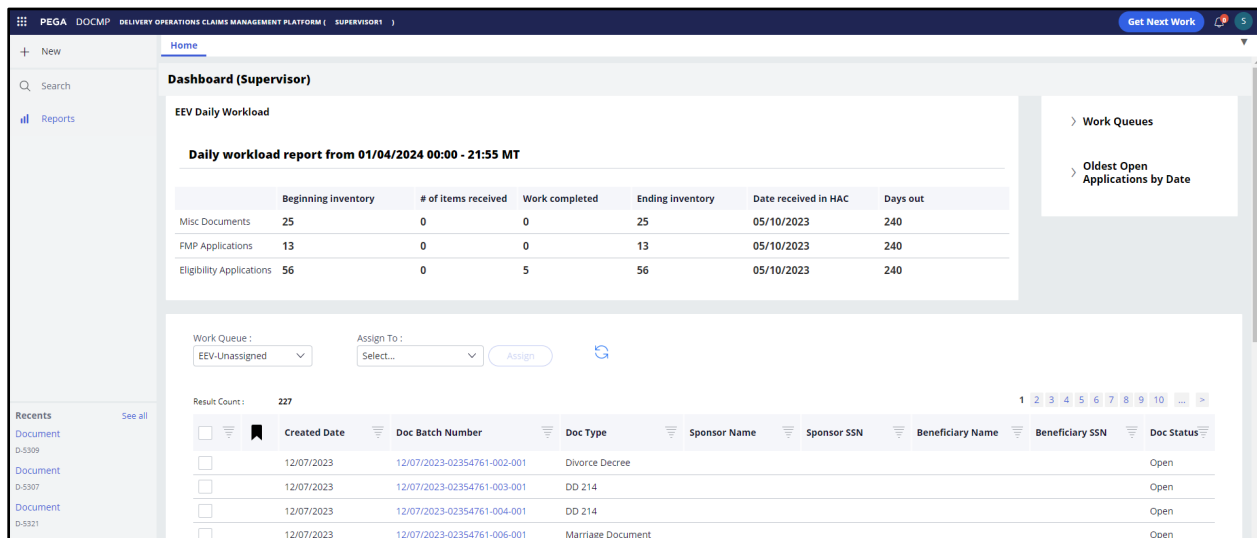
- **Result Count:** A read-only field that displays the total number of items that have been assigned to the user.
- **Created Date:** The date on which the document was uploaded into the system.

- **Doc Batch Number:** A system-generated number used to identify the batch associated with a document upload; especially useful when there are multiple documents associated with a case.
- **Doc Type:** Specifies the type of document (e.g., school certificate, Medicare, etc.)
- **Sponsor Name:** First and last name of the sponsor.
- **Sponsor SSN:** The sponsor's Social Security Number (SSN).
- **Beneficiary Name:** First and last name of the person named as beneficiary.
- **Beneficiary SSN:** The beneficiary's SSN.
- **Doc Status:** Displays the working status of the item (e.g., **Open**, **Complete**, etc.)
- **Owner:** Displays the user that is currently assigned to work on the item.

3.2.2.3. EEV Supervisor

Users with the EEV Supervisor role can assign cases to their team members, pull reports, and review escalated cases.

Figure 10: EEV Supervisor Dashboard



EEV Supervisors have access to the following main functions:

- **Search:** This button is located within the sidebar navigation and when selected, will open a new tab allowing the user to choose from a variety of options to refine their search of available documents.
- **Reports:** Located within the sidebar navigation; opens a new tab which displays all reports that are available to view.
- **Recents:** Accessed from the sidebar navigation and lists the user's most recently accessed documents.

- **Get Next Work:** This button is in the header at the top of the page. When selected, it opens the user's next work item in a new tab.
- **Assign:** This button allows supervisors to assign or re-assign work items to their team members.
- **Bulk Edit:** Located above the work list, this button allows the user to select multiple cases and update them all with the same information or action.

3.2.2.4. EEV Supervisor Dashboard Overview

The EEV Supervisor dashboard contains three main sections that the user can work from:

- **Daily Workload**
- **Work Queue**
- **Work List**

The **Daily Workload** section displays a report of the total workload inventory from the previous day, organized by type. The data shown in this report is updated daily. It contains the following fields:

Figure 11: EEV Supervisor Dashboard - Daily Workload Report

| EEV Daily Workload | | | | | | |
|--|---------------------|---------------------|----------------|------------------|----------------------|----------|
| Daily workload report from 01/04/2024 00:00 - 21:55 MT | | | | | | |
| | Beginning inventory | # of items received | Work completed | Ending inventory | Date received in HAC | Days out |
| Misc Documents | 25 | 0 | 0 | 25 | 05/10/2023 | 240 |
| FMP Applications | 13 | 0 | 0 | 13 | 05/10/2023 | 240 |
| Eligibility Applications | 56 | 0 | 5 | 56 | 05/10/2023 | 240 |

- **Beginning inventory:** The total count of work items that were in the system at the end of the previous day.
- **# of items received:** The number of new items received the previous day.
- **Work completed:** The number of work items marked as completed.
- **Ending inventory:** The total count of open work items in the system the last time the report was refreshed.
- **Date received in HAC:** Date when VFMP received the file; included in the Doc Batch Number.
- **Days out:** The number of days from date received to previous/current day.

The **Work Queue** lists all items that need to be assigned or worked on.

Figure 12: EEV Supervisor Dashboard – Work Queue

Work Queue :

EEV-Unassigned

Assign To :

Select...

Assign

Result Count :

227

1

2

3

4

5

6

7

8

9

10

...

>

| <input type="checkbox"/> | | | Created Date | Doc Batch Number | Doc Type | Sponsor Name | Sponsor SSN | Beneficiary Name | Beneficiary SSN | Doc Status |
|--------------------------|--|--|--------------|-----------------------------|-------------------------|--------------|-------------|------------------|-----------------|------------|
| <input type="checkbox"/> | | | 12/07/2023 | 12/07/2023-02354761-002-001 | Divorce Decree | | | | | Open |
| <input type="checkbox"/> | | | 12/07/2023 | 12/07/2023-02354761-003-001 | DD 214 | | | | | Open |
| <input type="checkbox"/> | | | 12/07/2023 | 12/07/2023-02354761-004-001 | DD 214 | | | | | Open |
| <input type="checkbox"/> | | | 12/07/2023 | 12/07/2023-02354761-006-001 | Marriage Document | | | | | Open |
| <input type="checkbox"/> | | | 12/07/2023 | 12/07/2023-02354761-008-001 | Medicare | | | | | Open |
| <input type="checkbox"/> | | | 12/07/2023 | 12/07/2023-02354761-009-001 | Miscellaneous Documents | | | | | Open |

- **Work Queue:** Drop-down menu that allows a supervisor to select the status of the work items listed. Options include:
 - **Unassigned** – All items that have not yet been assigned to a team member or queue.
 - **Supervisor Action** – Items that require action on behalf of the supervisor.
 - **Rescan Request** – Items that have been flagged as needing to be rescanned due to visual quality or other reason.
- **Assign To:** Drop-down menu that lists team members or groups that can have cases assigned to them.
- **Assign:** This button allows supervisors to assign or re-assign work items to their team members.
- **Refresh button:** This button allows the user to refresh the list to view the most recent items.
- **Result Count:** A read-only field that displays the total number of items still listed in the queue.
- **Created Date:** The date on which the document was uploaded into the system.
- **Doc Batch Number:** A system-generated number used to identify the batch associated with a document upload; especially useful when there are multiple documents associated with a case.
- **Doc Type:** Specifies the type of document (e.g., school certificate, Medicare, etc.)
- **Sponsor Name:** First and last name of the sponsor.
- **Sponsor SSN:** The sponsor's SSN.
- **Beneficiary Name:** First and last name of the person named as beneficiary.
- **Beneficiary SSN:** The beneficiary's SSN.
- **Doc Status:** Displays the working status of the item (e.g., **Open**, **Complete**, etc.)

The **Work List** contains work items that have already been assigned to a particular user.

Figure 13: EEV Supervisor Dashboard – Work List

Work List:


Techuser1

Assign To :

Select...












Assign

Bulk Edit



Result Count :

3

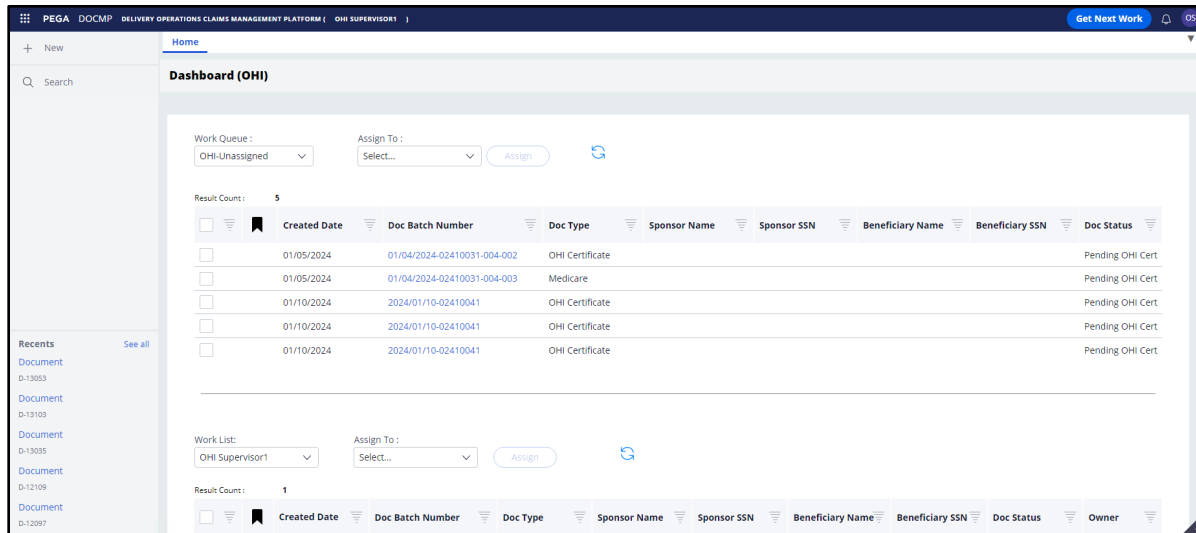
| <input type="checkbox"/> |  |  | Created Date  | Doc Batch Number  | Doc Type  | Sponsor Name  | Sponsor SSN  | Beneficiary Name  | Beneficiary SSN  | Doc Status  | Owner  |
|--------------------------|---|---|--|--|--|--|---|--|---|--|---|
| <input type="checkbox"/> | | | 12/07/2023 | 12/07/2023-02354761-007-001 | Medicare | | | | | Open | Techuser1 |
| <input type="checkbox"/> | | | 12/07/2023 | 12/07/2023-02354761-008-001 | Medicare | | | | | Open | Techuser1 |
| <input type="checkbox"/> | | | 12/07/2023 | 12/07/2023-02354761-010-001 | School Certificate | | | | | Open | Techuser1 |

- **Work List:** Drop-down menu that allows a supervisor to select a team member from the drop-down menu to see what has already been assigned to that individual.
- **Assign To:** Drop-down menu that lists of team members or groups that can have cases assigned to them. A supervisor can use this to re-assign an item to another team member, if desired.
- **Assign:** This button allows supervisors to assign or re-assign work items to their team members.
- **Bulk Edit:** Located above the work list, this button allows the user to select multiple cases and update them all with the same information or action.
- **Refresh button:** Displayed as an image, this button allows the user to refresh the list to view the most recent items.
- **Result Count:** A read-only field that displays the total number of items contained in the list.
- **Created Date:** The date on which the document was uploaded into the system.
- **Doc Batch Number:** A system-generated number used to identify the batch associated with a document upload; especially useful when there are multiple documents associated with a case.
- **Doc Type:** Specifies the type of document (e.g., school certificate, Medicare, etc.)
- **Sponsor Name:** First and last name of the sponsor.
- **Sponsor SSN:** The sponsor's SSN.
- **Beneficiary Name:** First and last name of the person named as beneficiary.
- **Beneficiary SSN:** The beneficiary's SSN.
- **Doc Status:** Displays the working status of the item (e.g., **Open**, **Complete**, etc.)
- **Owner:** Displays the user that is currently assigned to work on the item.

3.2.2.5. OHI Supervisor

Users with the OHI Supervisor role can assign cases to their team members and review escalated cases.

Figure 14: Default OHI Supervisor User Screen



OHI Supervisors have access to the following main functions:

- **Search:** This button is located within the sidebar navigation and when selected, will open a new tab allowing the user to choose from a variety of options to refine their search of available documents.
- **Recents:** Accessed from the sidebar navigation and lists the user's most recently accessed documents.
- **Get Next Work:** This button is in the header at the top of the page. When selected, it opens the user's next work item in a new tab.
- **Assign:** This button allows supervisors to assign or re-assign work items to their team members.

3.2.2.6. OHI Supervisor Dashboard Overview

The OHI Supervisor dashboard contains two main sections that the user can work from:

- **Work Queue**
- **Work List**

The **Work Queue** lists all items that need to be assigned or worked on.

Figure 15: OHI Supervisor Dashboard – Work Queue

Work Queue :

OHI-Unassigned

Assign To :

Select...

Assign

Result Count :

5

| <input type="checkbox"/> | | | Created Date | | Doc Batch Number | | Doc Type | | Sponsor Name | | Sponsor SSN | | Beneficiary Name | | Beneficiary SSN | | Doc Status | |
|--------------------------|--|--|--------------|--|-----------------------------|--|-----------------|--|--------------|--|-------------|--|------------------|--|-----------------|--|------------------|--|
| <input type="checkbox"/> | | | 01/05/2024 | | 01/04/2024-02410031-004-002 | | OHI Certificate | | | | | | | | | | Pending OHI Cert | |
| <input type="checkbox"/> | | | 01/05/2024 | | 01/04/2024-02410031-004-003 | | Medicare | | | | | | | | | | Pending OHI Cert | |
| <input type="checkbox"/> | | | 01/10/2024 | | 2024/01/10-02410041 | | OHI Certificate | | | | | | | | | | Pending OHI Cert | |
| <input type="checkbox"/> | | | 01/10/2024 | | 2024/01/10-02410041 | | OHI Certificate | | | | | | | | | | Pending OHI Cert | |
| <input type="checkbox"/> | | | 01/10/2024 | | 2024/01/10-02410041 | | OHI Certificate | | | | | | | | | | Pending OHI Cert | |

- **Work Queue:** Drop-down menu that allows a supervisor to select the status of the work items listed. Options include:
 - **Unassigned** – All items that have not yet been assigned to a team member or queue.
 - **Supervisor Action** – Items that require action on behalf of the supervisor.
 - **Rescan Request** – Items that have been flagged as needing to be rescanned due to visual quality or other reason.
- **Assign To:** Drop-down menu that lists team members or groups that can have cases assigned to them.
- **Assign:** This button allows supervisors to assign or re-assign work items to their team members.
- **Refresh button:** This button allows the user to refresh the list to view the most recent items.
- **Result Count:** A read-only field that displays the total number of items still listed in the queue.
- **Created Date:** The date on which the document was uploaded into DOCMP - Pega.
- **Doc Batch Number:** A system-generated number used to identify the batch associated with a document upload; especially useful when there are multiple documents associated with a case.
- **Doc Type:** Specifies the type of document (e.g., school certificate, Medicare, etc.)
- **Sponsor Name:** First and last name of the sponsor.

- **Sponsor SSN:** The sponsor's SSN.
- **Beneficiary Name:** First and last name of the person named as beneficiary.
- **Beneficiary SSN:** The beneficiary's SSN.
- **Doc Status:** Displays the working status of the item (e.g., **Open**, **Complete**, etc.)

The **Work List** section contains work items that have already been assigned to a particular user.

Figure 16: OHI Supervisor Dashboard – Work List

Work List: Assign To:

Result Count: 1

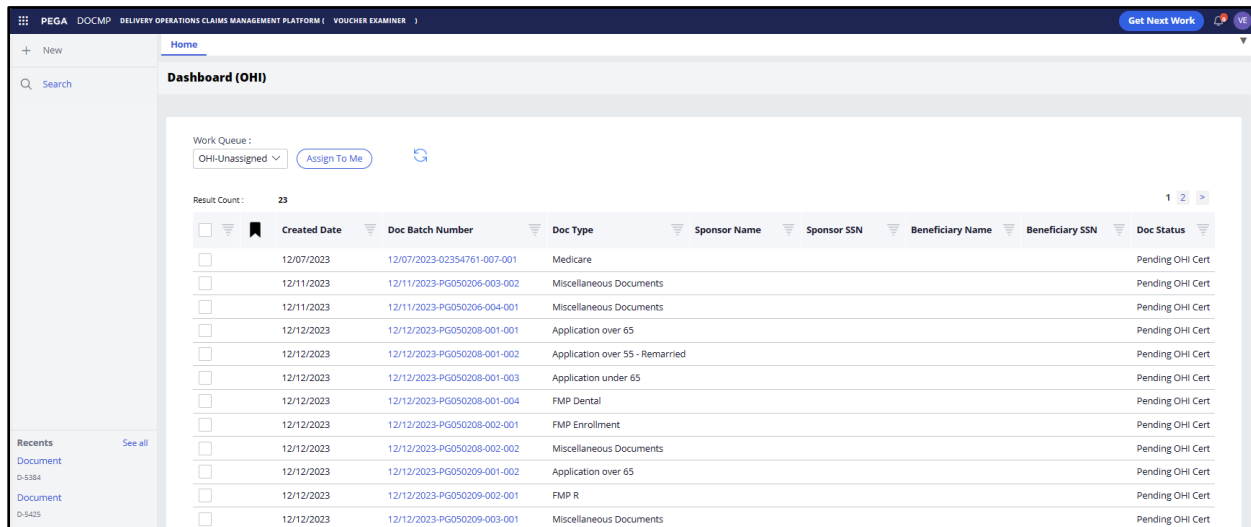
| | Created Date | Doc Batch Number | Doc Type | Sponsor Name | Sponsor SSN | Beneficiary Name | Beneficiary SSN | Doc Status | Owner |
|--------------------------|--------------|-------------------|----------|--------------|-------------|------------------|-----------------|------------------|-----------------|
| <input type="checkbox"/> | 12/22/2023 | 12222023-02410022 | Medicare | | | | | Pending OHI Cert | OHI Supervisor1 |

- **Work List:** Drop-down menu that allows a supervisor to select a team member from the drop-down menu to see what has already been assigned to that individual.
- **Assign To:** Drop-down menu that lists of team members or groups that can have cases assigned to them. A supervisor can use this to re-assign an item to another team member, if desired.
- **Assign:** This button allows supervisors to assign or re-assign work items to their team members.
- **Refresh button:** Displayed as an image, this button allows the user to refresh the list to view the most recent items.
- **Result Count:** A read-only field that displays the total number of items contained in the list.
- **Created Date:** The date on which the document was uploaded into the system.
- **Doc Batch Number:** A system-generated number used to identify the batch associated with a document upload; especially useful when there are multiple documents associated with a case.
- **Doc Type:** Specifies the type of document (e.g., school certificate, Medicare, etc.)
- **Sponsor Name:** First and last name of the sponsor.
- **Sponsor SSN:** The sponsor's SSN.
- **Beneficiary Name:** First and last name of the person named as beneficiary.
- **Beneficiary SSN:** The beneficiary's SSN.
- **Doc Status:** Displays the working status of the item (e.g., **Open**, **Complete**, etc.)
- **Owner:** Displays the user that is currently assigned to work on the item.

3.2.2.7. OHI Voucher Examiner

Users with the OHI Voucher Examiner role can self-assign, view, and update OHI certificates in DOCMP - Pega. After logging into the application, the OHI Voucher Examiner user's default view will be their **Work Queue**, which displays any work items that have already been assigned.

Figure 17: Default OHI Voucher Examiner Screen



OHI Voucher Examiners have access to the following functions:

- **Search:** This button is located within the sidebar navigation and when selected, will open a new tab allowing the user to choose from a variety of options to refine their search of available documents.
- **Recents:** Also accessed from the sidebar navigation and lists the user's most recently accessed documents.
- **Get Next Work:** This button is located in the header at the top of the page. When selected, it opens the user's next work item in a new tab.
- **Assign to Me:** This button allows examiners to assign work items to themselves.
- **Refresh button:** This button allows the user to refresh the list to view the most recent items.

The **Work Queue** lists all items that have already been assigned to the user and contains the following fields:

- **Result Count:** A read-only field that displays the total number of items that have been assigned to the user.
- **Created Date:** The date on which the document was uploaded into the system.

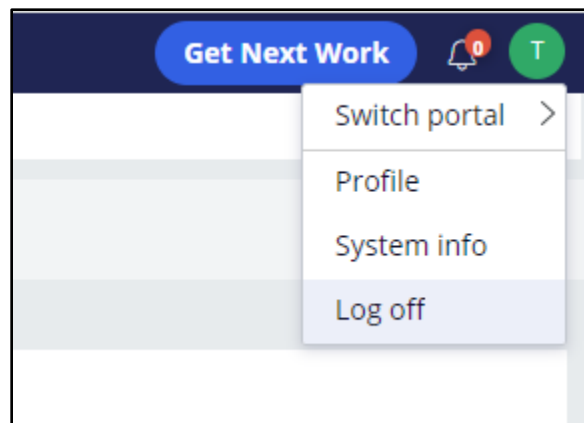
- **Doc Batch Number:** A system-generated number used to identify the batch associated with a document upload; especially useful when there are multiple documents associated with a case.
- **Doc Type:** Specifies the type of document (e.g., school certificate, Medicare, etc.)
- **Sponsor Name:** First and last name of the sponsor.
- **Sponsor SSN:** The sponsor's SSN.
- **Beneficiary Name:** First and last name of the person named as beneficiary.
- **Beneficiary SSN:** The beneficiary's SSN.
- **Doc Status:** Displays the working status of the item (e.g., **Open**, **Complete**, etc.)

3.3. Logging Off

Properly exiting the application helps to prevent personal patient information from being visible to others. To reenter the application, reload the DOCMP - Pega URL.

1. To exit the DOCMP - Pega application, select the user profile icon in the top-right corner of the screen to open the drop-down menu.

Figure 18: User Profile drop-down menu



2. Select **Log off**.

4. Using the Software

DOCMP - Pega provides user functionality for the following operations:

- **Conducting a Search**
- **Viewing Documents**
 - **Document Details Functions**
- **Assigning Cases**
 - **Assigning Cases in the Work Queue**
 - **Assigning Cases in the Work List**
- **Pulling Reports**
 - **Exporting Reports**
- **Editing Cases**
 - **Bulk Editing Cases**
- **Working with OHI Certificates**
 - **Self-Assign a Document**
 - **View and Update OHI Certificates**

4.1. Conducting a Search

Any user role may run searches and view files in the DOCMP - Pega application. To conduct a search, follow the steps listed below:

1. From the sidebar navigation menu, select **Search**. The DOCMP - Pega **Search Options** tab displays.

Figure 19: DOCMP - Pega Search Options Tab

The screenshot displays the 'Search' tab in the DOCMP - Pega application. The interface includes a sidebar with 'Search' and 'Following' options. The main content area features search filters for 'Sponsor Name', 'Sponsor SSN', 'Beneficiary Name', 'Beneficiary SSN', 'Document Batch Number', and 'Advanced'. There are also fields for 'Sponsor Last Name', 'Sponsor First Name', 'Sponsor Middle Initial', 'Document Type', 'From Date', and 'To Date'. Below the filters is a table of search results with columns: 'Created Date', 'Doc Batch Number', 'Doc Type', 'Sponsor Name', 'Sponsor SSN', 'Beneficiary Name', 'Beneficiary SSN', and 'Doc Status'. The results show various application types and OHI Certificates.

| Created Date | Doc Batch Number | Doc Type | Sponsor Name | Sponsor SSN | Beneficiary Name | Beneficiary SSN | Doc Status |
|--------------|------------------------------|---------------------------------|--------------|-------------|------------------|-----------------|----------------------|
| 10/3/2023 | 10/03/2023-PG0000001-004-001 | Application over 55 - Remarried | | | | | Resolved - Rescanned |
| 10/3/2023 | 10/03/2023-PG0000001-005-001 | Application over 65 | | | | | Resolved - Rescanned |
| 10/3/2023 | 10/03/2023-PG0000001-006-001 | Application under 65 | | | | | Resolved - Rescanned |
| 10/3/2023 | 10/03/2023-PG0000001-007-001 | Miscellaneous Documents | | | | | Resolved-Duplicate |
| 10/3/2023 | 10/03/2023-PG0000001-008-001 | Miscellaneous Documents | | | | | Resolved-Duplicate |
| 10/5/2023 | 10/05/2023-PG0000001-009-001 | OHI Certificate | | | | | Resolved - Rescanned |
| 10/5/2023 | 10/05/2023-PG0000001-010-001 | OHI Certificate | | | | | Resolved - Rescanned |
| 10/6/2023 | 10/06/2023-PG000398-001-001 | OHI Certificate | | | | | Resolved - Rescanned |

2. The **Search** tab allows you to select the radio buttons for the type of search you want to conduct. The available data fields will change based on your selection. The options are as follows:

- **Sponsor Name**
- **Sponsor SSN**
- **Beneficiary Name**
- **Beneficiary SSN**
- **Document Batch Number**
- **Advanced**

3. Enter the search criteria into the applicable field(s) to locate the item you want to view.

NOTE: For the purposes of this instruction, the **Sponsor Last Name** has been entered as the search criteria.

Figure 20: DOCMP - Pega Search Option Entry

The screenshot displays the Pega Search interface. On the left, under 'Search Options', the 'Sponsor Name' radio button is selected. The main search area contains fields for 'Sponsor Last Name' (with 'test' entered), 'Sponsor First Name', 'Sponsor Middle Initial', 'Document Type' (a dropdown menu), 'From Date', and 'To Date'. Below these fields are 'Search' and 'Clear' buttons. The 'Search' button is highlighted with a red box. Below the search area, the 'Result Count : 427' is shown. A table displays the search results with columns: Created Date, Doc Batch Number, Doc Type, Sponsor Name, Sponsor SSN, Beneficiary Name, Beneficiary SSN, and Doc Status. The table shows five rows of data, all with a 'Complete' status.

| Created Date | Doc Batch Number | Doc Type | Sponsor Name | Sponsor SSN | Beneficiary Name | Beneficiary SSN | Doc Status |
|--------------|-----------------------------|-------------------|--------------|-------------|------------------|-----------------|------------|
| 12/12/2023 | 12/11/2023-02357998-001-001 | DD 214 | | | | | Complete |
| 12/12/2023 | 12/11/2023-02357998-002-001 | DD 214 | test test | | | | Complete |
| 12/12/2023 | 12/11/2023-02357998-001-001 | Marriage Document | | | | | Complete |
| 12/12/2023 | 12/11/2023-02357998-002-001 | Marriage Document | | | | | Complete |
| 12/12/2023 | 12/11/2023-02357998-003-001 | Marriage Document | | | | | Complete |

4. Select **Search**. The search results display in the **Result Count** section of the page.

Figure 21: DOCMP - Pega Search Results

Search Options

- ☒ Sponsor Name
- ☐ Sponsor SSN
- ☐ Beneficiary Name
- ☐ Beneficiary SSN
- ☐ Document Batch Number
- ☐ Advanced

Sponsor Last Name: test

Sponsor First Name:

Sponsor Middle Initial:

Document Type: -Select Doc Type-

From Date:

To Date:

Search Clear

Result Count : 13

| Created Date | Doc Batch Number | Doc Type | Sponsor Name | Sponsor SSN | Beneficiary Name | Beneficiary SSN | Doc Status |
|--------------|-----------------------------|-------------------------|--------------|----------------------|------------------|-----------------|------------|
| 12/12/2023 | 12/11/2023-02357998-002-001 | DD 214 | test test | | | | Complete |
| 12/12/2023 | 12/11/2023-02357998-004-001 | Miscellaneous Documents | | | Rework Test | | Complete |
| 12/12/2023 | 12/11/2023-02357998-006-001 | Miscellaneous Documents | | 12192023 Rework Test | | | Complete |
| 12/12/2023 | 12/11/2023-02357998-008-001 | Miscellaneous Documents | | 12192023 Rework Test | | | Complete |
| 12/14/2023 | 12/05/2023-02359220-009-001 | Miscellaneous Documents | | 12192023 Rework Test | | | Complete |

NOTE: Select the **Clear** button if you want to start over with new search criteria.

4.2. Viewing Documents

Any user role may view files in the DOCMP - Pega application. To view the details of a document, follow the steps listed below:

Figure 22: EEV Contact Representative Dashboard

Dashboard (Tech User)

Bulk Edit

Result Count : 1

| Created Date | Doc Batch Number | Doc Type | Sponsor Name | Sponsor SSN | Beneficiary Name | Beneficiary SSN | Doc Status | Owner |
|--------------|-----------------------------|----------------|--------------|-------------|------------------|-----------------|------------|-------------|
| 01/10/2024 | 01/10/2024-02410038-008-001 | FMP Enrollment | | | | | Open | Tech User 1 |

1. From the **Dashboard**, select the link under the **Doc Batch Number** column for the file you would like to view. The details of the selected document will open in a new tab.

Figure 23: Document Details Tab

Document (D-15041) **OPEN** Escalate

Review Document 11

Details **Audit**

Attachments
FMPE0001.PDF

Details

Sponsor Last Name Sponsor First Name

Sponsor Middle Initial Sponsor SSN

Beneficiary Last Name Beneficiary First Name

Beneficiary Middle Initial Beneficiary SSN

Additional Details

Document Type * Owner

Determination Type Eligibility Determination Date

FMP Enrollment 1 / 2 67% + - 🔍 📄 🖨 ⋮

EEC Document separator

Document separator

Document Type:

☐ 3894A or B ☐ FMP Dental

☐ Address Change ☐ FMP Enrollment

☐ Appeal ☐ FMP RD

☐ Application over 55 - Remarried ☐ Marriage document

☐ Application over 65 ☐ Medicare

☐ Application under 65 ☐ Miscellaneous documents

☐ CMS Data Match ☐ OWT Certificate

☐ Congressional ☐ POA

☐ Correspondence ☐ R01

☐ CWV ☐ RR Enrollments

☐ DD 214 ☐ School Certificate

☐ DRA Rating decision ☐ SHAR Screen

☐ Death Certificate ☐ VIS SCREEN

- To view an electronic copy of the document, selecting the link under **Attachments** will allow you to download a copy of the full document for viewing.

NOTE: To close the tab, select the **X** next to the assignment name/number.

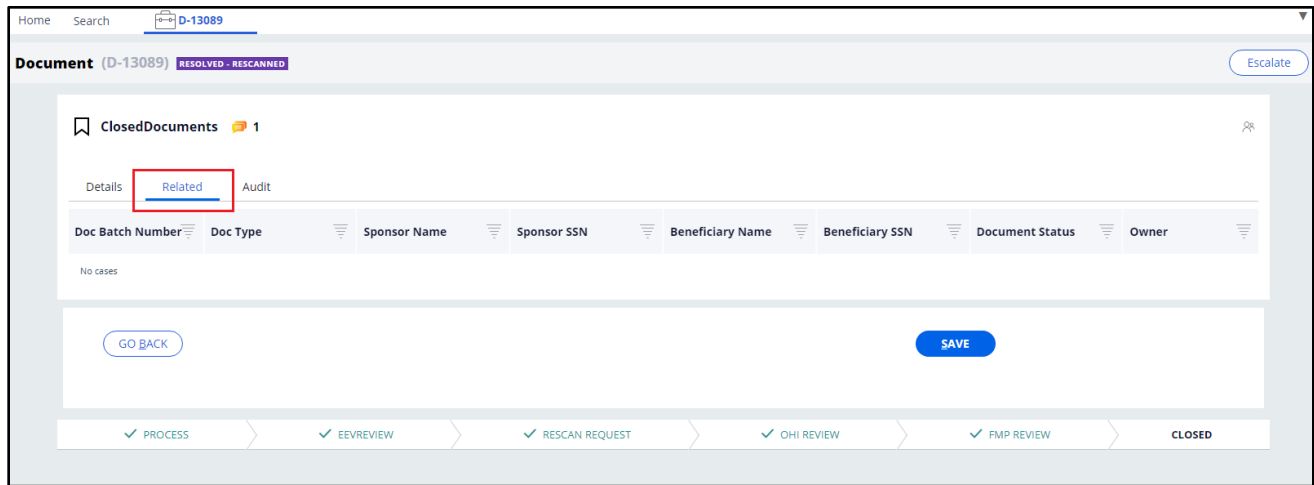
4.2.1. Document Details Functions

There are three additional functions available to use within the **Document Details** tab: **Related**, **Audit**, and **Escalate**.

4.2.1.1. Viewing Related Documents

If there are multiple documents associated with the same sponsor/beneficiary, the **Related** option will be available. Selecting this option will display a list of any related documents.

Figure 24: Document Details - Related Function

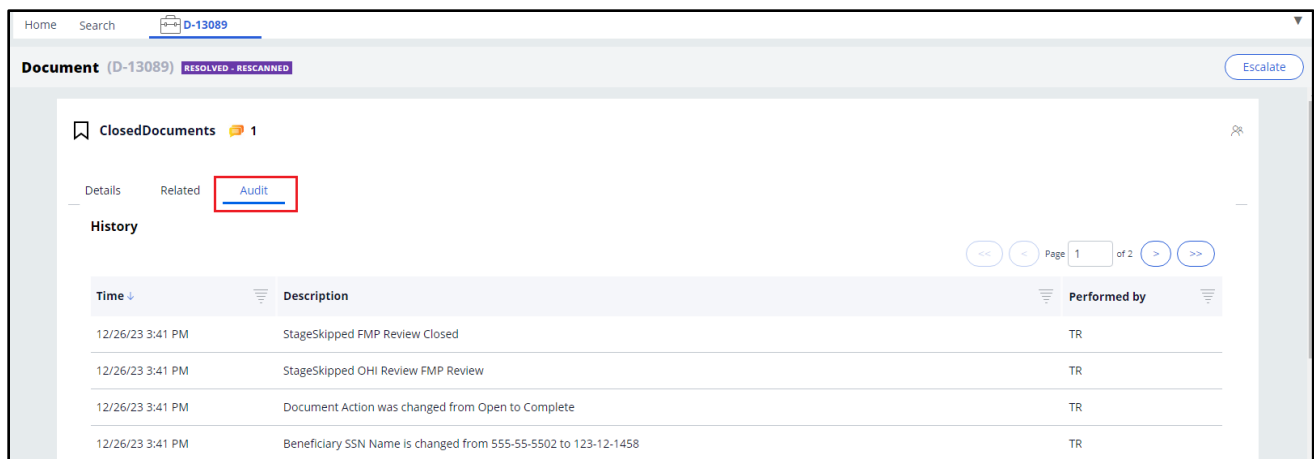


4.2.1.2. Auditing Documents

The **Audit** function tracks all user and system activity for the document. Selecting this option will display the document **History** details which include:

- **Time**
- **Description**
- **Performed by**

Figure 25: Document Details - Audit Function

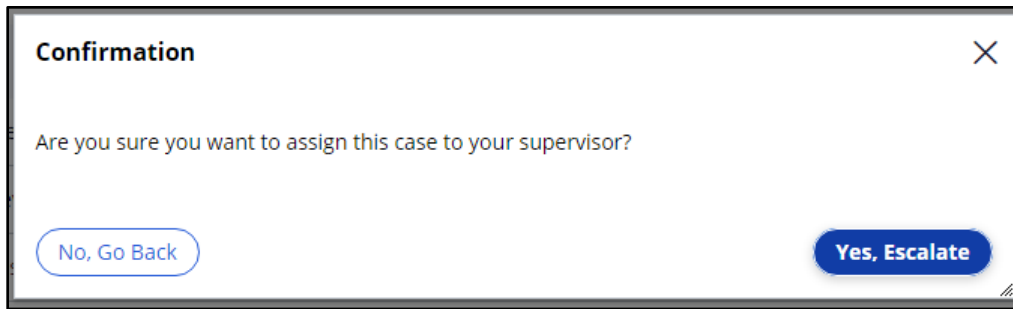


4.2.1.3. Escalating Documents

The **Escalate** function allows you to assign a document to a supervisor for further review or to request a rescan. To escalate a case, follow the steps listed below:

1. Select the **Escalate** button and a confirmation dialog box will display.

Figure 26: Document Details – Escalate Confirmation Dialog Box



2. Select **No, Go Back** if you want to continue working on the document. Select **Yes, Escalate** to confirm the escalation to your supervisor. When the escalation is complete, the system will return you to the **Search** page.

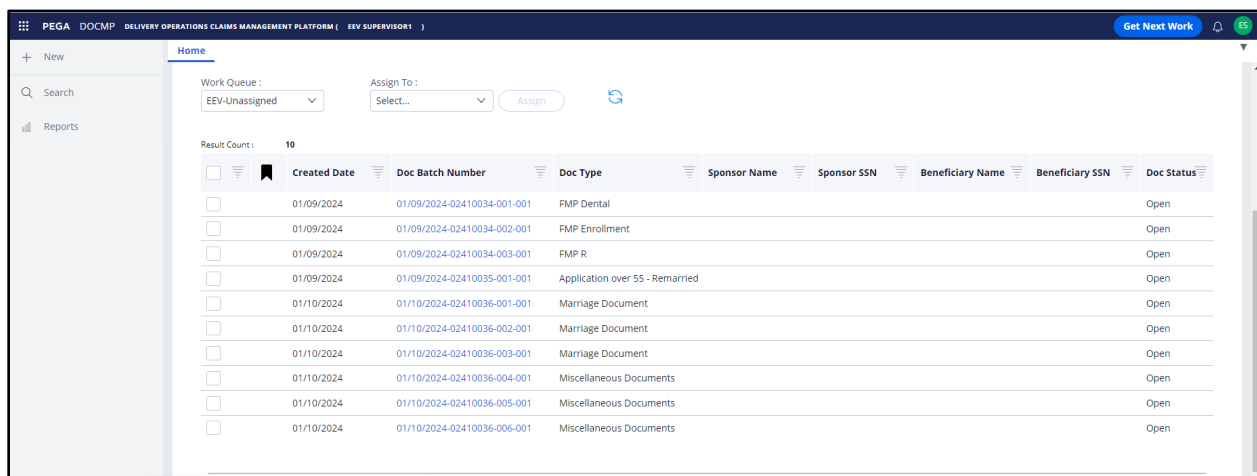
4.3. Assigning Cases

4.3.1. Assigning Cases in the Work Queue

Only users with a Supervisor role can assign cases in the application. To assign cases from the Work Queue, follow the steps listed below:

1. From the **Work Queue** drop-down menu select **Unassigned**. All unassigned cases will be displayed on the dashboard.

Figure 27: Unassigned Work Queue



2. Select the checkbox next to the case/document you want to assign.
3. From the **Assign To** drop-down menu, select the name of the individual you want to assign the file to.
4. Select **Assign**. The screen will update with a confirmation that an item has been assigned to the user.

Figure 28: Assigned Document Confirmation Message

The screenshot shows the PEGA DOCMP interface for a supervisor. The left sidebar contains navigation options: New, Search, Reports, and Data Cleanup. The main area displays the 'Home' tab with a 'D-5299' identifier. It features a 'Work Queue' dropdown set to 'EEV-Unassigned' and an 'Assign To' dropdown set to 'Select...'. An 'Assign' button and a refresh icon are present. Below this, a message states '1 document(s) assigned to Techuser1'. A 'Result Count' of 237 is shown. A table lists the assigned documents:

| | Created Date | Doc Batch Number | Doc Type | Sponsor Name |
|--------------------------|--------------|-----------------------------|-------------------------|--------------|
| <input type="checkbox"/> | 12/07/2023 | 12/07/2023-PG050204-001-002 | Application under 65 | |
| <input type="checkbox"/> | 12/07/2023 | 12/07/2023-PG050204-001-003 | FMP Enrollment | |
| <input type="checkbox"/> | 12/07/2023 | 12/07/2023-PG050204-003-001 | Miscellaneous Documents | |

NOTE: You can also verify that the assignment was successful by selecting the worker's name from the **Work List** drop-down menu. All cases assigned to that worker will be displayed.

4.3.2. Assigning Cases in the Work List

To assign cases in the work list, follow the steps listed below:

1. From the **Work List** drop-down menu, select **Assigned** or the name of the user whose work list you are editing. The cases will be displayed on the dashboard.

Figure 29: Assigned Work List

The screenshot shows the PEGA DOCMP interface for an 'EEV SUPERVISOR1'. The left sidebar contains navigation options: New, Search, and Reports. The main area displays the 'Home' tab. It features a 'Work List' dropdown set to 'EEV-Assigned' and an 'Assign To' dropdown set to 'Select...'. An 'Assign' button and a 'Bulk Edit' button are present. Below this, a 'Result Count' of 10 is shown. A table lists the assigned cases:

| | Created Date | Doc Batch Number | Doc Type | Sponsor Name | Sponsor SSN | Beneficiary Name | Beneficiary SSN | Doc Status |
|--------------------------|--------------|-----------------------------|----------------------|--------------|-------------|------------------|-----------------|------------|
| <input type="checkbox"/> | 01/04/2024 | 01/04/2024-02410029-001-002 | blank | | | | | Open |
| <input type="checkbox"/> | 01/05/2024 | 01/04/2024-02410030-001-001 | DD 214 | | | | | Open |
| <input type="checkbox"/> | 01/05/2024 | 01/04/2024-02410030-002-001 | DD 214 | Test Patient | | | | Open |
| <input type="checkbox"/> | 01/05/2024 | 01/04/2024-02410031-004-001 | Application under 65 | | | | | Open |
| <input type="checkbox"/> | 01/05/2024 | 01/04/2024-02410031-004-002 | OHI Certificate | | | | | Open |
| <input type="checkbox"/> | 01/05/2024 | 01/04/2024-02410031-004-003 | Medicare | | | | | Open |
| <input type="checkbox"/> | 01/09/2024 | 01/09/2024-02410033-001-001 | Death Certificate | | | | | Open |

2. Select the checkbox next to the case/document you want to assign/re-assign.

- From the **Assign To** drop-down menu, select the name of the individual you want to assign the file to.

Figure 30: Work List – Assign To Selection

Work List:


Tech User 1

Assign To:



TRAVIS BANE

Assign

Bulk Edit



Result Count: 4

| <input type="checkbox"/> |  |  | Created Date | Doc Batch Number | Doc Type | Sponsor Name | Sponsor SSN | Beneficiary Name | Beneficiary SSN | Doc Status | Owner |
|-------------------------------------|---|---|--------------|-----------------------------|-------------------|--------------|-------------|------------------|-----------------|------------|-------------|
| <input type="checkbox"/> | | | 01/05/2024 | 01/04/2024-02410030-002-001 | DD 214 | Test Patient | | | | Open | Tech User 1 |
| <input type="checkbox"/> | | | 01/05/2024 | 01/04/2024-02410031-004-002 | OHI Certificate | | | | | Open | Tech User 1 |
| <input type="checkbox"/> | | | 01/05/2024 | 01/04/2024-02410031-004-003 | Medicare | | | | | Open | Tech User 1 |
| <input checked="" type="checkbox"/> | | | 01/09/2024 | 01/09/2024-02410033-001-001 | Death Certificate | | | | | Open | Tech User 1 |

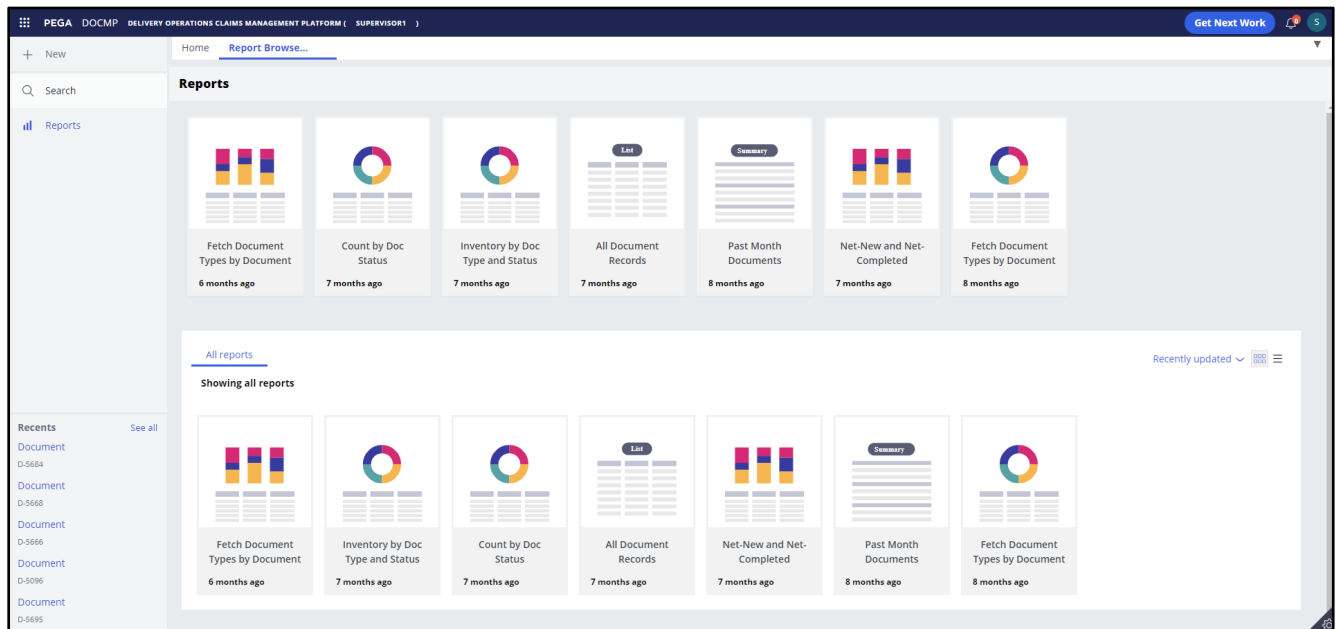
- Select **Assign**. The item will be removed from the work list.

4.4. Pulling Reports

Only users with an EEV Supervisor role can pull reports in the application. To pull a report, follow the steps listed below:

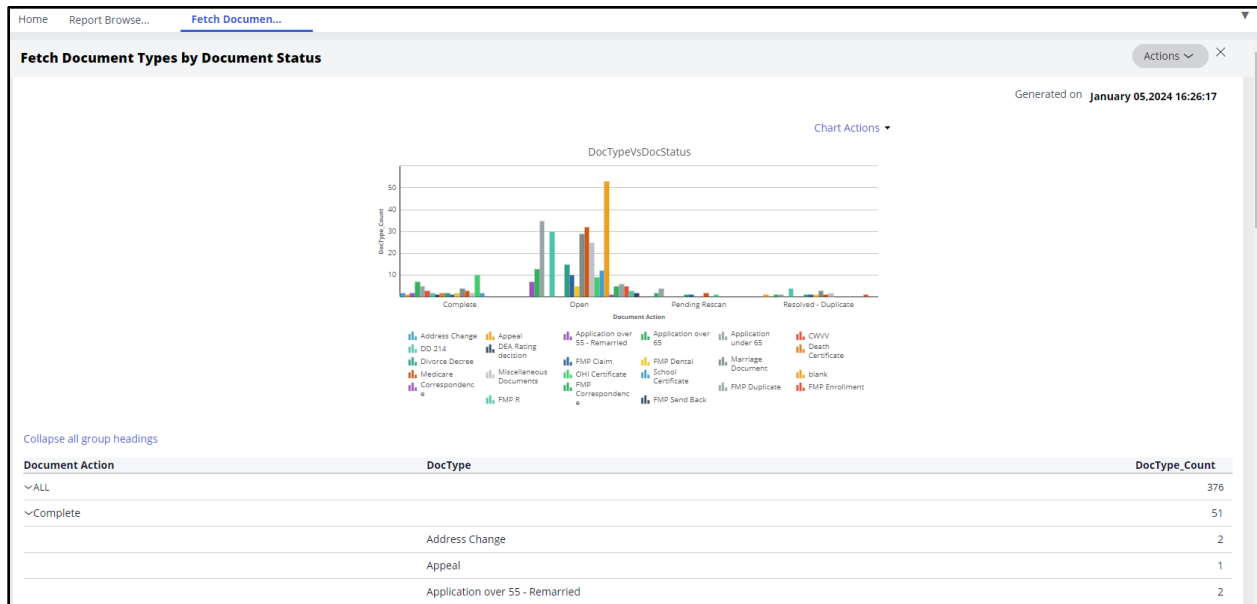
- From the sidebar navigation menu, select the **Reports** option. The **Reports** tab displays.

Figure 31: Report Browser Tab



- Select the report type you want to view. The details of the report will display in a new tab.

Figure 32: Report Details Tab



4.4.1. Exporting Reports

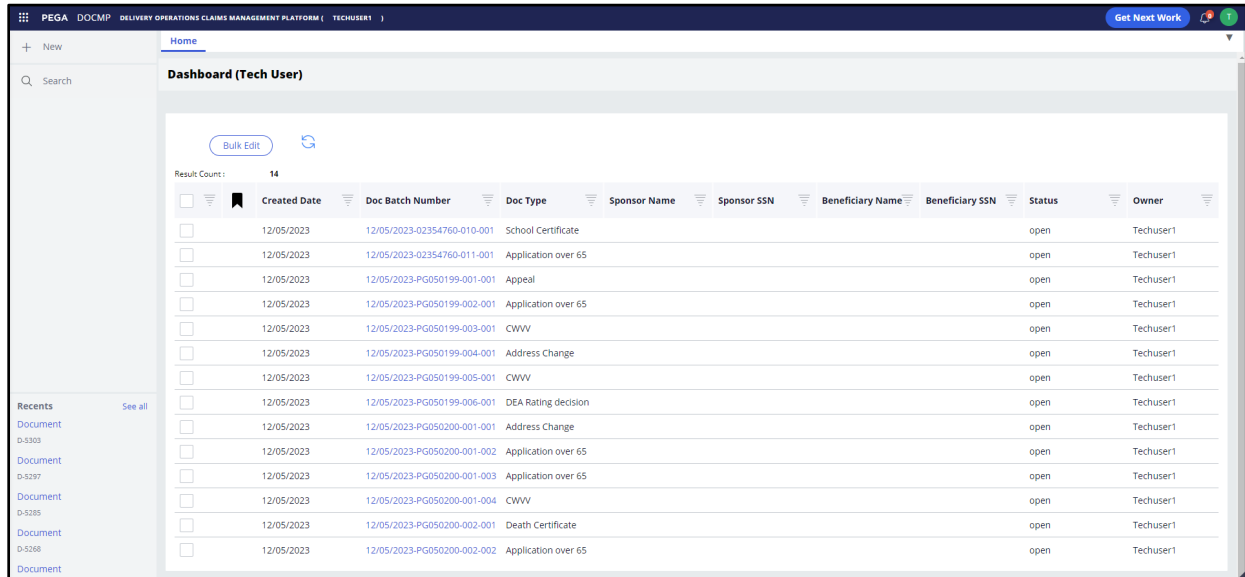
DOCMP – Pega allows Supervisor users to export report data to a PDF or Excel file. To export a report, follow the steps listed below:

1. From the sidebar navigation menu, select the **Reports** option. The **Reports** tab displays.
2. Select the report type you want to view. The details of the report will display in a new tab.
3. From the **Actions** drop-down menu, select **Refresh**, **Export to PDF**, or **Export to Excel**. The system will automatically download the file in the chosen format (.pdf or .xlsx).

4.5. Editing Cases

Users with a Supervisor or Contact Representative role may edit cases in the DOCMP - Pega application. The fields that can be edited include the beneficiary's name and SSN, dates, document type, and case status. To edit a case, follow the steps listed below:

Figure 33: EEV Contact Representative User Dashboard

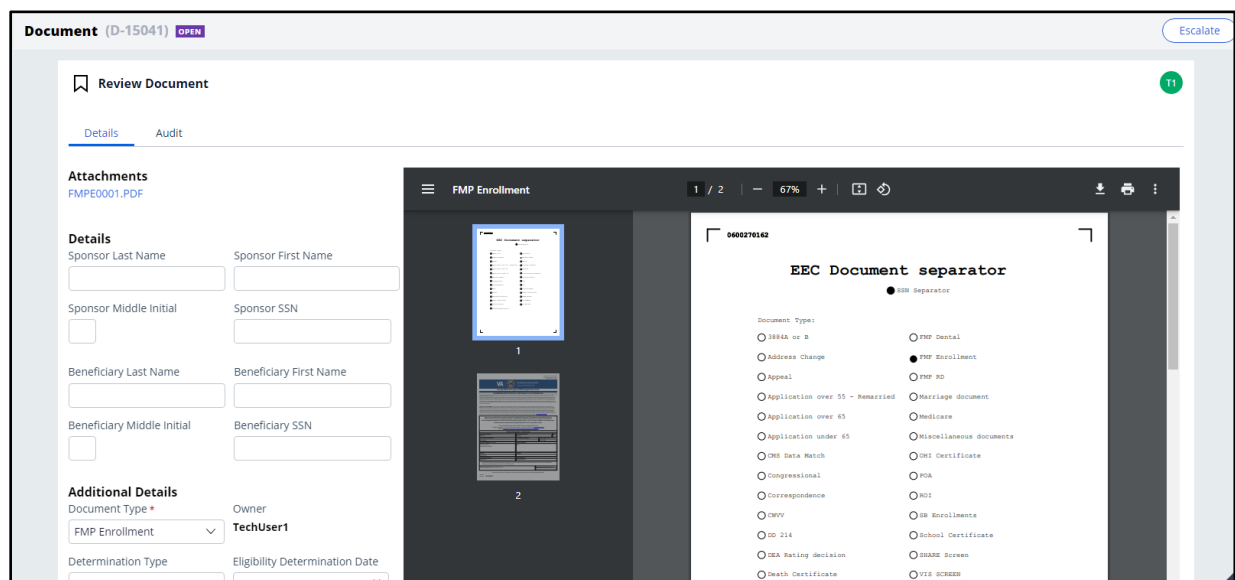


The screenshot shows the 'Dashboard (Tech User)' interface. It features a 'Bulk Edit' button and a table with 14 results. The table columns are: Created Date, Doc Batch Number, Doc Type, Sponsor Name, Sponsor SSN, Beneficiary Name, Beneficiary SSN, Status, and Owner. The data rows show various document types like 'School Certificate', 'Application over 65', 'Appeal', 'CWV', 'Address Change', 'DEA Rating decision', and 'Death Certificate', all with a status of 'open' and owned by 'Techuser1'.

| Created Date | Doc Batch Number | Doc Type | Sponsor Name | Sponsor SSN | Beneficiary Name | Beneficiary SSN | Status | Owner |
|--------------|-----------------------------|---------------------|--------------|-------------|------------------|-----------------|--------|-----------|
| 12/05/2023 | 12/05/2023-02354760-010-001 | School Certificate | | | | | open | Techuser1 |
| 12/05/2023 | 12/05/2023-02354760-011-001 | Application over 65 | | | | | open | Techuser1 |
| 12/05/2023 | 12/05/2023-PG050199-001-001 | Appeal | | | | | open | Techuser1 |
| 12/05/2023 | 12/05/2023-PG050199-002-001 | Application over 65 | | | | | open | Techuser1 |
| 12/05/2023 | 12/05/2023-PG050199-003-001 | CWV | | | | | open | Techuser1 |
| 12/05/2023 | 12/05/2023-PG050199-004-001 | Address Change | | | | | open | Techuser1 |
| 12/05/2023 | 12/05/2023-PG050199-005-001 | CWV | | | | | open | Techuser1 |
| 12/05/2023 | 12/05/2023-PG050199-006-001 | DEA Rating decision | | | | | open | Techuser1 |
| 12/05/2023 | 12/05/2023-PG050200-001-001 | Address Change | | | | | open | Techuser1 |
| 12/05/2023 | 12/05/2023-PG050200-001-002 | Application over 65 | | | | | open | Techuser1 |
| 12/05/2023 | 12/05/2023-PG050200-001-003 | Application over 65 | | | | | open | Techuser1 |
| 12/05/2023 | 12/05/2023-PG050200-001-004 | CWV | | | | | open | Techuser1 |
| 12/05/2023 | 12/05/2023-PG050200-002-001 | Death Certificate | | | | | open | Techuser1 |
| 12/05/2023 | 12/05/2023-PG050200-002-002 | Application over 65 | | | | | open | Techuser1 |

1. From the **Dashboard**, select the **Doc Batch Number** of the work item and it will open in a new tab.

Figure 34: EEV Contact Representative Document Details Tab (1 of 2)



The screenshot shows the 'Document (D-15041)' details page. It includes a 'Review Document' section with 'Details' and 'Audit' tabs. The 'Attachments' section shows a PDF document titled 'FMPE0001.PDF'. The 'Details' section contains fields for Sponsor and Beneficiary information, including Last Name, First Name, Middle Initial, and SSN. The 'Additional Details' section includes 'Document Type' (FMP Enrollment) and 'Determination Type'. A large preview window shows the document content, which includes a table of document types and a list of document types.

| Document Type | Document Type |
|---|---|
| <input type="radio"/> 1884a or B | <input type="radio"/> FMP Enrollment |
| <input type="radio"/> Address Change | <input type="radio"/> FMP SO |
| <input type="radio"/> Appeal | <input type="radio"/> Marriage document |
| <input type="radio"/> Application over 55 - Remarried | <input type="radio"/> Medicine |
| <input type="radio"/> Application over 65 | <input type="radio"/> Miscellaneous documents |
| <input type="radio"/> Application under 65 | <input type="radio"/> DHS Certificate |
| <input type="radio"/> DHS Data Match | <input type="radio"/> POA |
| <input type="radio"/> Congressional | <input type="radio"/> ROL |
| <input type="radio"/> Correspondence | <input type="radio"/> SS Enrollments |
| <input type="radio"/> CWV | <input type="radio"/> School Certificate |
| <input type="radio"/> ID 214 | <input type="radio"/> SSAD Screen |
| <input type="radio"/> DEA Rating decision | <input type="radio"/> VISA SCREEN |
| <input type="radio"/> Death Certificate | |

Figure 35: EEV Contact Rep Document Details Tab (2 of 2) - Additional Details View

2. Enter or edit the information in the fields.
3. Under **Additional Details**, confirm that the system has populated the **Document Type** drop-down menu correctly. Select the desired option (**Complete**, **Open**, **Request Rescan**, or **Resolved as Duplicate**) from the **Document Action** drop-down menu and add any **Comments** that may be needed.
4. Select **Save**.

Figure 36: Save Confirmation

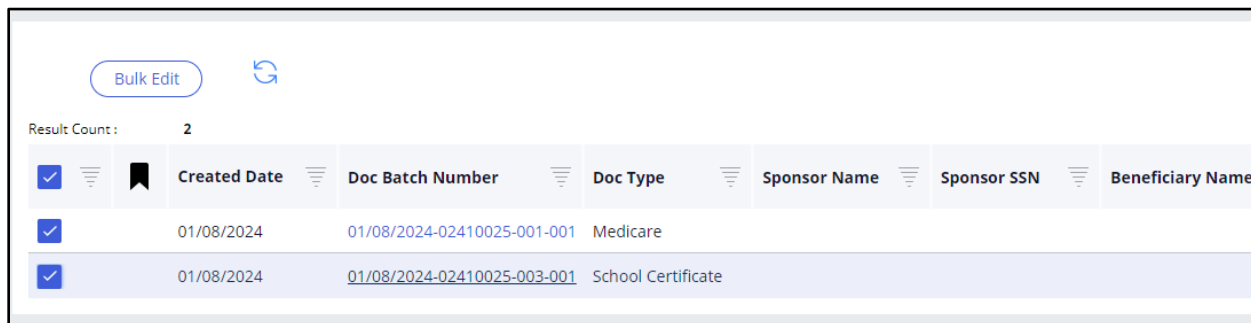
NOTE: Select the **Go Back** button if you want to return to your work list without saving your changes.

4.5.1. Bulk Editing Cases

DOCMP - Pega allows users with an EEV Supervisor or EEV Contact Representative role to select multiple cases and update them all with the same information or action. To bulk edit a case, follow the steps listed below:

1. From the **Dashboard** (or EEV Supervisor **Work List**), select the checkboxes next to the cases you want to edit.

Figure 37: User Work List Selected Cases

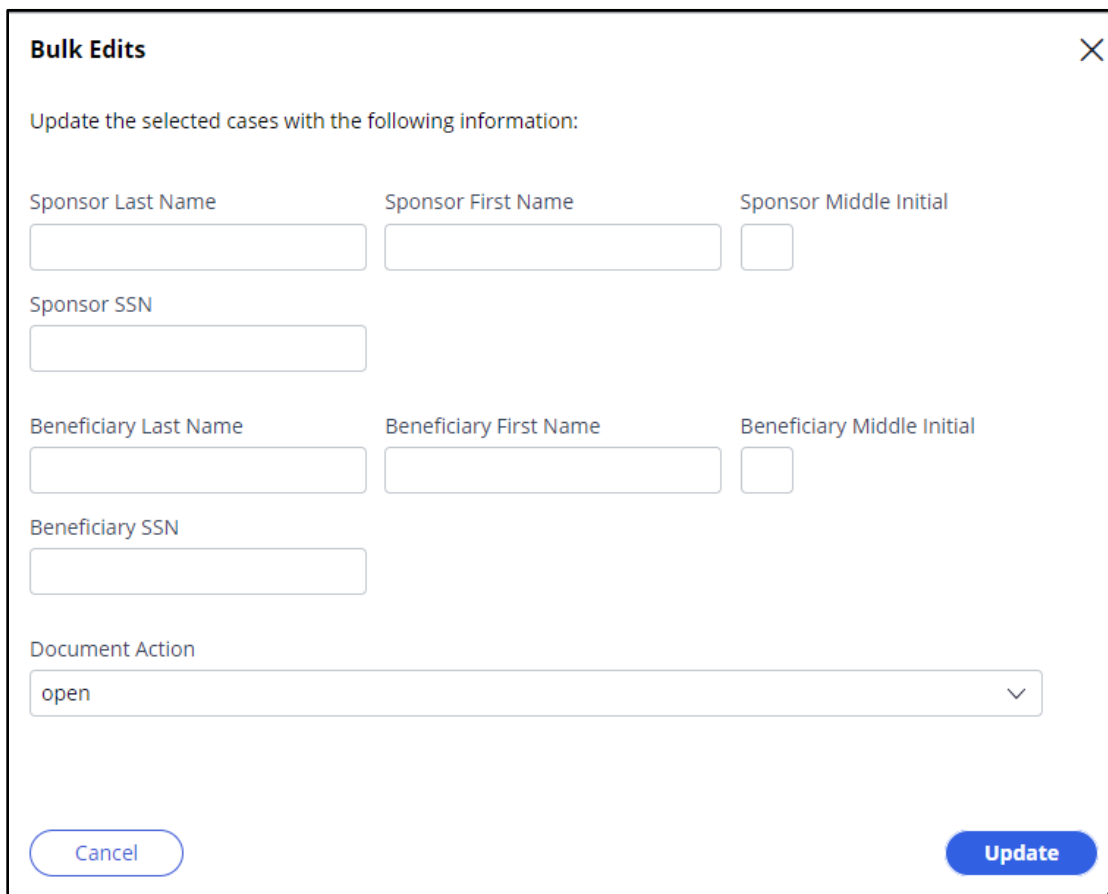


The screenshot shows a table with columns: Created Date, Doc Batch Number, Doc Type, Sponsor Name, Sponsor SSN, and Beneficiary Name. Two rows are selected, indicated by blue checkboxes in the first column. Above the table, there is a 'Bulk Edit' button and a refresh icon. The 'Result Count' is 2.

| | Created Date | Doc Batch Number | Doc Type | Sponsor Name | Sponsor SSN | Beneficiary Name |
|-------------------------------------|--------------|-----------------------------|--------------------|--------------|-------------|------------------|
| <input checked="" type="checkbox"/> | 01/08/2024 | 01/08/2024-02410025-001-001 | Medicare | | | |
| <input checked="" type="checkbox"/> | 01/08/2024 | 01/08/2024-02410025-003-001 | School Certificate | | | |

2. Select the **Bulk Edit** button. The **Bulk Edits** dialog box displays.

Figure 38: Bulk Edits Dialog Box



The dialog box is titled 'Bulk Edits' and contains the following fields:

- Sponsor Last Name
- Sponsor First Name
- Sponsor Middle Initial
- Sponsor SSN
- Beneficiary Last Name
- Beneficiary First Name
- Beneficiary Middle Initial
- Beneficiary SSN
- Document Action (dropdown menu, currently set to 'open')

At the bottom, there are 'Cancel' and 'Update' buttons.

3. Enter the information or select the action you want to complete for the selected items.
4. Select **Update**. The dialog box will close, and your update(s) will be visible in the work list.

NOTE: Select the **Cancel** button if you want to return to your work list without saving your changes.

4.6. Working with OHI Certificates

Any user with an OHI Voucher Examiner role may self-assign, view, and update OHI certificates in the DOCMP - Pega application.

4.6.1. Self-Assign a Document

To self-assign a document, follow the steps listed below.

Figure 39: OHI Voucher Examiner Dashboard

| | Created Date | Doc Batch Number | Doc Type | Sponsor Name | Sponsor SSN | Beneficiary Name | Beneficiary SSN | Doc Status |
|--------------------------|--------------|-----------------------------|---------------------------------|--------------|-------------|------------------|-----------------|------------------|
| <input type="checkbox"/> | 12/07/2023 | 12/07/2023-02354761-007-001 | Medicare | | | | | Pending OHI Cert |
| <input type="checkbox"/> | 12/11/2023 | 12/11/2023-PG050206-003-002 | Miscellaneous Documents | | | | | Pending OHI Cert |
| <input type="checkbox"/> | 12/11/2023 | 12/11/2023-PG050206-004-001 | Miscellaneous Documents | | | | | Pending OHI Cert |
| <input type="checkbox"/> | 12/12/2023 | 12/12/2023-PG050208-001-001 | Application over 65 | | | | | Pending OHI Cert |
| <input type="checkbox"/> | 12/12/2023 | 12/12/2023-PG050208-001-002 | Application over 55 - Remarried | | | | | Pending OHI Cert |
| <input type="checkbox"/> | 12/12/2023 | 12/12/2023-PG050208-001-003 | Application under 65 | | | | | Pending OHI Cert |
| <input type="checkbox"/> | 12/12/2023 | 12/12/2023-PG050208-001-004 | FMP Dental | | | | | Pending OHI Cert |
| <input type="checkbox"/> | 12/12/2023 | 12/12/2023-PG050208-002-001 | FMP Enrollment | | | | | Pending OHI Cert |
| <input type="checkbox"/> | 12/12/2023 | 12/12/2023-PG050208-002-002 | Miscellaneous Documents | | | | | Pending OHI Cert |
| <input type="checkbox"/> | 12/12/2023 | 12/12/2023-PG050209-001-002 | Application over 65 | | | | | Pending OHI Cert |
| <input type="checkbox"/> | 12/12/2023 | 12/12/2023-PG050209-002-001 | FMP R | | | | | Pending OHI Cert |
| <input type="checkbox"/> | 12/12/2023 | 12/12/2023-PG050209-003-001 | Miscellaneous Documents | | | | | Pending OHI Cert |

1. From the **Dashboard (OHI Voucher Examiner)**, select the checkbox next to the item in your **Work Queue**.
2. Select the **Assign to Me** button. The screen will update with confirmation that an item has been assigned to you.

PEGA DOCMP DELIVERY OPERATIONS CLAIMS MANAGEMENT PLATFORM (VOUCHER EXAMINER)
[Get Next Work](#)

+ New
[Home](#)

Dashboard (OHI)

Work Queue : OHI-Unassigned Assign To Me ↻

1 document(s) assigned to Voucher Examiner

Result Count : **25** 1 2 >

| <input type="checkbox"/> | | | Created Date | Doc Batch Number | Doc Type | Sponsor Name | Sponsor SSN | Beneficiary Name | Beneficiary SSN | Doc Status |
|--------------------------|--|--|--------------|-----------------------------|-------------------------|--------------|-------------|------------------|-----------------|------------------|
| <input type="checkbox"/> | | | 11/07/2023 | 11/07/2023-PG050146-002-001 | Medicare | GNW TEST | | | | Pending OHI Cert |
| <input type="checkbox"/> | | | 12/05/2023 | 12/05/2023-02354760-007-001 | Medicare | GNW Test | | | | Pending OHI Cert |
| <input type="checkbox"/> | | | 12/07/2023 | 12/07/2023-02354761-007-001 | Medicare | | | | | Pending OHI Cert |
| <input type="checkbox"/> | | | 12/11/2023 | 12/11/2023-PG050206-003-002 | Miscellaneous Documents | | | | | Pending OHI Cert |
| <input type="checkbox"/> | | | 12/11/2023 | 12/11/2023-PG050206-004-001 | Miscellaneous Documents | | | | | Pending OHI Cert |

NOTE: Alternatively, you can select the **Get Next Work** button which will assign to you the oldest document from the OHI Unassigned Work Queue.

4.6.2. View and Update OHI Certificates

To view and update OHI Certificates, follow the steps listed below:

1. From the **Dashboard (OHI Voucher Examiner)** select the **Doc Batch Number** of the item from the **Work List**. The details of the selected document will open in a new tab.

Figure 41: OHI Document Details Tab (1 of 2)

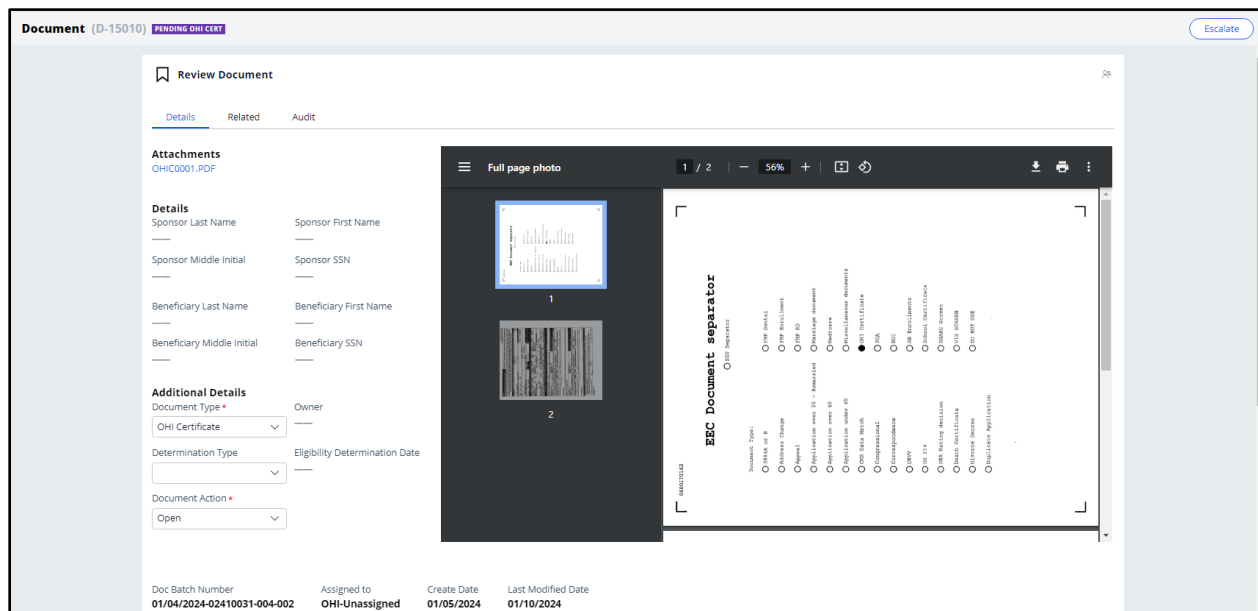


Figure 42: OHI Document Details Tab (2 of 2) - Additional Details View

Document (D-15010) PENDING OHI CERT [Escalate](#)

Additional Details

Document Type: Owner
 OHI Certificate

Determination Type: Eligibility Determination Date

Document Action:
 Open

Doc Batch Number: 01/04/2024-02410031-004-002 Assigned to: OHI-Unassigned Create Date: 01/05/2024 Last Modified Date: 01/10/2024

Comments :

Remaining: 1000 characters

[Add Comments](#)

| Time | Comment | Author |
|----------|---------|--------|
| No items | | |

[GO BACK](#) [SAVE](#)

2. Confirm the beneficiary information listed.
3. Under **Additional Details**, confirm that the system has populated the **Document Type** drop-down menu correctly. Select the desired option (**Complete**, **Open**, or **Resolved as Duplicate**) from the **Document Action** drop-down menu and add any **Comments** that may be needed.
4. Select **Save**. You will receive confirmation that the document was saved successfully.

Figure 43: OHI Document Save Confirmation

Home [D-5385](#)

Document (D-5385) PENDING OHI CERT

Thank you for your input.

✓ PROCESS > ✓ EEVREVIEW > **OHI REVIEW** > FMP REVIEW > CLOSED

[Information](#) [Audit](#)

This document is saved successfully. Select the [Close](#) button to exit. [Close](#)

Case details

Last updated by
Voucher Examiner (1m ago)

Created by
Venkat Yerredla (29d ago)

Tags [+](#)

5. Appendix A: Acronyms and Abbreviations

| Acronym | Definition |
|----------------|---|
| DOCMP | Delivery Operations Claims Management Platform |
| EEV | Eligibility, Enrollment, and Verification |
| ESD | Enterprise Service Desk |
| HAC | Health Administration Center |
| OHI | Office of Health Information |
| OIT | Office of Information and Technology |
| PDF | Portable Document Format |
| Pega | Low-Code Platform for Workflow Automation |
| PIV | Personal Identity Verification |
| R&R | Review and Resolution Department |
| SSN | Social Security Number |
| URL | Uniform Resource Locator |
| VA | Department of Veterans Affairs |
| VAEC | VA Enterprise Cloud |
| VFMP | Veteran Family Medical Programs |
| VIP | Veteran-focused Integrated Process |
| VistA | Veterans Health Information Systems and Technology Architecture |
| VPN | Virtual Private Network |