## Revision History

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

<table>
<thead>
<tr>
<th>Date</th>
<th>Revision</th>
<th>Description</th>
<th>Author</th>
</tr>
</thead>
<tbody>
<tr>
<td>1/16/2019</td>
<td>1.0</td>
<td>Initial Creation</td>
<td>Joy Owen</td>
</tr>
</tbody>
</table>
# Table of Contents

1. Introduction ......................................................................................................................................... 1
   1.1. Purpose ......................................................................................................................................... 1
   1.2. Prerequisites .................................................................................................................................. 1
   1.3. Organizational Contacts................................................................................................................ 1

2. System Summary ................................................................................................................................ 1
   2.1. User Access Levels....................................................................................................................... 1

3. Getting Started .................................................................................................................................... 1
   3.1. Logging On................................................................................................................................... 2
   3.2. CEP Registration .......................................................................................................................... 4
       3.2.1. Adding an Alternate Address ............................................................................................... 5
       3.2.2. Uploading a Bulk Vendor File ............................................................................................. 6
       3.2.3. Submitting Registration........................................................................................................ 7

4. Using the System ................................................................................................................................. 7
   4.1. Parts of the Welcome Screen ........................................................................................................ 8
   4.2. Using My Profile .......................................................................................................................... 9
       4.2.1. Adding Vendor ID(s)............................................................................................................ 9
       4.2.2. Viewing Registration Status ............................................................................................... 11
       4.2.3. Viewing Registration and Profile Requests ........................................................................ 11
   4.3. Researching a Claim ................................................................................................................... 13
       4.3.1. Running a Medical Claim Inquiry ...................................................................................... 13
       4.3.2. Running the Treasury Offset Program Report .................................................................... 16
       4.3.3. Running the Payment Paid Report ..................................................................................... 18
       4.3.4. Running the Payment Scheduled Report ............................................................................ 20
   4.4. Scheduling a Report .................................................................................................................... 22
   4.5. Exit System ................................................................................................................................. 25

5. Troubleshooting ................................................................................................................................ 26
   5.1. Turning Compatibility Settings Off ............................................................................................ 26
   5.2. Regaining System Access ........................................................................................................... 26
   5.3. Vendor ID Cannot be Verified Automatically ............................................................................ 26
       5.3.1. Vendor ID Does Not Exist ................................................................................................. 26
       5.3.2. Vendor ID Rejected ............................................................................................................ 27

Acronyms ................................................................................................................................................... 29

Appendix A. Rejection Status............................................................................................................... 30
1. Introduction

1.1. Purpose
The purpose of the guide is to familiarize users with the important features and navigational elements of the Customer Engagement Portal (CEP).

The benefits of using CEP are 24/7 operations, timely accounting system updates, and reporting in a variety of formats.

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

- a basic knowledge of the operating system (such as the use of commands, menu options, and navigation tools).
- assignment of the appropriate active roles, menus, and security keys required.
- validated access to CEP.

1.3. Organizational Contacts
For help with the CEP, contact:

- Phone: 1-512-460-5380 or 877.353.9791
- Email: vafscscshd@va.gov

2. System Summary
The CEP is a reporting tool for VA Medical Providers to verify the status of claims as well as run payment reconciliation reports. This is accomplished by providing information such as Check/EFT numbers, amounts, Invoice numbers, Veteran’s names, and dates of service based on Tax ID number.

2.1. User Access Levels
External Users run inquiries, identify payments, and run payment reconciliation reports.

3. Getting Started
To gain access to the CEP application, you must:

- have one of the following logon credentials:
  - Department of Defense (DoD) Common Access Card (CAC) for active duty military personnel, selected Reserve, DoD civilian employees, and eligible contractor personnel
  - Personal Identity Verification (PIV) card – for U.S. federal employees and federal contractors
  - ID.me – for external vendors
- register yourself with the CEP application (see CEP Registration).

**NOTE:** CEP Registration follows the procedures in Logging On.
3.1. Logging On

To log onto the system, complete the following steps:


   **NOTE:** If you receive a message saying you are using an unsupported browser, see procedures in Turning Compatibility Settings Off.

   The CEP Login screen displays (see Figure 1).

   ![Customer Engagement Portal Login](image)

   **Figure 1. Customer Engagement Portal Login**

2. Click Login.

   The Continue Login Process window displays (see Figure 2).

   ![Continue Login Process](image)

   **Figure 2. Continue Login Process window**

3. Click Continue.

   You are redirected to AccessVA (see Figure 3).
Choose a secure VA Partner to sign into Customer Engagement Portal (CEP):
Don't have one? Register for a Sign-in Partner or Learn More

4. Click the appropriate log in credential.
   You may be directed to an external site to register (see Figure 4).

5. Click Accept.
   If you have not registered your account, follow screen prompts and register. Otherwise, continue by signing in (see Figure 5).
This U.S government system is intended to be used by [authorized VA network users] for viewing and retrieving information only, except as otherwise explicitly authorized. VA information resides on and transmits through computer systems and networks funded by VA. All use is considered to be with an understanding and acceptance that there is no reasonable expectation of privacy for any data or transmission on Government Intranet or Extranet (non-public) networks or systems. All transactions that occur on this system and all data transmitted through this system are subject to review and action including (but not limited to) monitoring, recording, retrieving, copying, auditing, inspecting, investigating, restricting access, blocking, tracking, disclosing to authorized personnel, or any other authorized actions by all authorized VA and law enforcement personnel. All use of this system constitutes understanding and unconditional acceptance of these terms. Unauthorized attempts or acts to either (1) access, upload, change, or delete information on this system, (2) modify this system, (3) deny access to this system, or (4) accrue resources for unauthorized use on this system are strictly prohibited. Such attempts or acts are subject to action that may result in criminal, civil, or administrative penalties.

6. Click the checkbox.

7. Click Agree.

The CEP Welcome screen displays (see Figure 6).

To register yourself as an external user and request access to your company’s TaxIDs, complete the following steps:

1. From the CEP Welcome screen, click Register.

   The External User Registration screen displays (see Figure 7).

**3.2. CEP Registration**

To register yourself as an external user and request access to your company’s TaxIDs, complete the following steps:

1. From the CEP Welcome screen, click Register.

   The External User Registration screen displays (see Figure 7).
2. Enter:

- Your Vendor ID and company information

**NOTE:** You can register up to five Vendor IDs individually, or you can use the Bulk Vendor file to upload up to 100 IDs simultaneously.

- Optional: If you want to upload a Bulk Vendor file, click the check box (see *Uploading a Bulk Vendor File*).
- Optional: 7 or 8-digit Check number (from the last 6 months) attached to the Vendor ID as payment
- Optional: Add an alternate address (see *Adding an Alternate Address*).

### 3.2.1. Adding an Alternate Address

There are cases where Vendors can be in multiple locations under the same Vendor IDs. To add an alternate address:

1. Click **Add Alternate Address** on the External User Registration screen. Information fields display (see Figure 8).
Figure 8. Add Alternate Address

2. Add the information for the alternate address.

   This information is added to your record when you submit the registration (see Submitting Registration).

3.2.2. Uploading a Bulk Vendor File

If you are seeking information on numerous vendors, you can upload a bulk vendor file to the CEP.

**Important!** This file needs to be in a specific format which is provided when you select **Download file**. Fill the required information into this template before proceeding.

To upload a bulk vendor file:

1. Click the check box next to “Do you want to upload Bulk Vendor file?” (see Figure 9).
**Please download the template to add Vendor Details and upload the vendor file (xlsx format only).**

**Please note that only first 100 records from the uploaded file will be processed.**

---

2. Click **Upload Bulk file**.

   The upload dialog box displays (see Figure 10).

---

**Note:** Bulk Vendor files must be in Excel format.

---

3. Click **Submit**.

   The Bulk Vendor file is uploaded to the system.

---

### 3.2.3. Submitting Registration

Once you have completed input, click **Submit** at the External User Registration screen to submit your registration for CEP access. An email notifies you that your request was submitted. Once approved, another email notifies you that you have access.

**Note:** You can log into the system and select My Profile to see the progress of your registration. If your Vendor ID is rejected, see Vendor ID.

---

### 4. Using the System

When you obtain access to CEP, use procedures in **Logging On** to log into the system. The Welcome screen displays (see Figure 11).

---
Welcome to CEP. This portion of screen will be used to display the messages and alerts for home page.

Medical Claims Inquiry
Portals for VA Medical Providers and Commercial Vendors to verify the status of claims, invoices, as well as run payment reconciliation reports.

Figure 11. CEP Welcome screen
From this screen, you can:

- Research a claim
- Run scheduled reports
- Add Vendor IDs
- Access FAQs, forms, and other contacts
- Contact the FSC Customer Engagement Center

4.1. Parts of the Welcome Screen
There are two main sections of the Welcome screen: the left navigation panel and the Medical Claims Inquiry. The following information describes parts of the Welcome screen:

<table>
<thead>
<tr>
<th>Screen Part</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Home</td>
<td>Clicking <strong>Home</strong> returns you to the Welcome screen.</td>
</tr>
<tr>
<td>Scheduled Reports</td>
<td>See <em>Scheduling a Report</em>.</td>
</tr>
<tr>
<td>My Profile</td>
<td>Clicking <strong>My Profile</strong> allows you to add Vendor ID(s) and see Vendor IDs you have access to. See <em>Using My Profile</em>.</td>
</tr>
<tr>
<td>General Info</td>
<td>Clicking General Info provides additional information such as FAQs, Forms, and Other Contacts.</td>
</tr>
<tr>
<td>Contact Us</td>
<td>Provides FSC Contact Information.</td>
</tr>
<tr>
<td>Medical Claims Inquiry</td>
<td></td>
</tr>
<tr>
<td>Medical Claims Inquiry Link</td>
<td>This is a reporting tool for claims, treasury offset, payment period, and payment scheduled. See <em>Researching a Claim</em>.</td>
</tr>
</tbody>
</table>
4.2. Using My Profile

My Profile allows you to:

- Add Vendor ID(s)
- Check the status of added Vendor ID(s)
- See a list of registration request cases that were not automatically approved.

4.2.1. Adding Vendor ID(s)

To add Vendor ID(s), complete the following steps:

1. Click My Profile.

   The My Profile Details screen displays (see Figure 12).

   ![My Profile Details screen](image)

   **NOTE:** This is the same screen discussed in CEP Registration. You may add individual vendors or upload a Bulk Vendor file (see Uploading a Bulk Vendor File).

2. Click Add Vendor ID(s).

   The External User Registration screen displays (see Figure 13).
3. Click Add Alternate Address on the External User Registration screen.

   Information fields display (see Figure 14).

4. Add the information for the alternate address.

   This information is added to your record when you submit the registration (see Submitting Registration).
4.2.2. Viewing Registration Status

To view the status of the Vendor ID(s), click Approved, Pending, or Rejected.

A list of Vendor IDs with the selected status displays (see Figure 15).

![Figure 15. Vendor ID status](image)

NOTE: If your Vendor ID is rejected, see Vendor ID.

4.2.3. Viewing Registration and Profile Requests

You can view the status of cases opened when automatic registration failed or when profile updates were requested. To view cases:

1. Click the My Cases tab of the My Profile Details screen.

   A list of cases and their status displays (see Figure 16).
2. Click the Case ID that you want to view. Details for that case display (see Figure 17).

![My Cases screen](image)

**Figure 16. My Cases screen**

**Figure 17. Case Details screen**
4.3. Researching a Claim

To research a medical claim, click the Medical Claims Inquiry link on the CEP Welcome screen. This takes you to the Medical Claims Inquiry screen (see Figure 18).

![Medical Claims Inquiry screen](image)

**Figure 18. Medical Claims Inquiry screen**

There are four tabs on this screen:

- Medical Claim Inquiry
- Treasury Offset Program Report
- Payment Paid Report
- Payment Scheduled Report

**NOTE:** Any time the search results for a report return less than 500 claims, you can export to Excel or CSV. Otherwise, you must run a Scheduled Report (see Scheduling a Report).

4.3.1. Running a Medical Claim Inquiry

To run an inquiry, complete the following steps:

1. Click Select next to Vendor ID(s).
   
   A list of approved Vendor IDs assigned to you displays (see Figure 19).
2. Click the checkbox next to the Vendor ID you want to run a query against (required field).

**NOTE:** Click Select All to select all Vendor IDs in the list.

3. Click Submit.

Selected Vendor ID(s) display in the Medical Claims Inquiry screen (see Figure 20).

4. Continue to add search criteria for the rest of the fields to include:
   - Claim Status (mandatory field)
   - Veteran’s Social Security Number (optional)
   - Claim ID (optional)
   - Patient Control Number (optional)
   - Service dates (optional)
   - Process dates (optional)

5. When done, select Search.

The search results display at the bottom of the screen (see Figure 21).
Your search returned more than 500 claims. To generate a real-time report, please adjust your search parameters or you may schedule the report to retrieve details of all the claims found. You will be notified via email once when your report is available to view/extract.

6. Select Additional Details for further details for the claim.

The additional details window displays (see Figure 22).

**Figure 22. Additional Claim Details**

**NOTE:** Depending on the claim status, additional details vary (see Table 1).

**Table 1. Additional Details**

<table>
<thead>
<tr>
<th>Claim Status</th>
<th>Additional Details Available</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accepted</td>
<td>• Claim Amount Paid</td>
</tr>
<tr>
<td></td>
<td>• Check/EFT Number</td>
</tr>
<tr>
<td></td>
<td>• Check/EFT Date</td>
</tr>
<tr>
<td></td>
<td>• Vendor Code Paid</td>
</tr>
</tbody>
</table>

**NOTE:** The system allows for 500 results. If more than 500 results occur, use the Scheduled Reports function (see Scheduling a Report) or provide additional search criteria to narrow results.
<table>
<thead>
<tr>
<th>Claim Status</th>
<th>Additional Details Available</th>
</tr>
</thead>
<tbody>
<tr>
<td>Denied</td>
<td>• Date Processed</td>
</tr>
<tr>
<td>Rejected</td>
<td>• Date Processed</td>
</tr>
<tr>
<td></td>
<td>• Rejection/Denial Reason</td>
</tr>
<tr>
<td>Suspended</td>
<td>• Suspended Date</td>
</tr>
</tbody>
</table>

7. Select **Close** to close the window.

### 4.3.2. Running the Treasury Offset Program Report

The Treasury Offset Program Report pulls information from the Treasury Offset database. Offset results are available 48 hours from the payment date. To run the report, complete the following steps:

1. From the Medical Claims Inquiry screen (see Figure 18), click the Treasury Offset Program Report tab.
   - Information for the Treasury Offset Program Report displays (see Figure 23).

![Medical Claims Inquiry](image)

**Figure 23. Treasury Offset Program Report tab**

2. Click Select next to Vendor ID(s).
   - A list of approved Vendor IDs assigned to you displays (see Figure 24).
3. Click the checkbox next to the Vendor ID you want to run a query against (required field).

**NOTE:** Click **Select All** to select all Vendor IDs in the list.

4. Click Submit.

The selected Vendor ID(s) display (see Figure 25).

5. Continue to add search criteria for the rest of the fields to include:
   - Payment Start Date (mandatory field)
   - Payment End Date (mandatory field)

6. When done, select Search.

The search results display at the bottom of the screen (see Figure 26).
Figure 26. Treasury Offset Results

4.3.3. Running the Payment Paid Report

This reflects the Payment History. To run the Payment Paid report, complete the following steps:

1. From the Medical Claims Inquiry screen (see Figure 18), click the Payment Paid Report tab. Information for the Payment Paid Report displays (see Figure 27).

![Figure 27. Payment Paid Report tab](image)

2. Click Select next to Vendor ID(s).

   A list of approved Vendor IDs assigned to you displays (see Figure 28).
3. Click the checkbox next to the Vendor ID you want to run a query against (required field).

**NOTE:** Click Select All to select all Vendor IDs in the list.

4. Click Submit.

The selected Vendor ID(s) display (see Figure 29).

5. Continue to add search criteria for the rest of the fields to include:
   - Check/EFT From and To dates (mandatory fields)

**NOTE:** The date range must be within one year. If not, you will receive an error message.

   - Check/EFT Number (optional)
   - PO Number (optional)
   - Invoice Number (optional)

6. When done, click Search.

The search results display at the bottom of the screen (see Figure 30).
NOTE: You can narrow the results by copying the desired Check/EFT Number, PO Number, or Invoice Number from the results list and pasting it in the appropriate search field. Re-run the search. If the results are now less than 500, you can export to Excel or CSV (see Figure 31).

4.3.4. Running the Payment Scheduled Report

This tab is for claims that are approved and scheduled to be paid. To run the Payment Scheduled report, complete the following steps:

1. From the Medical Claims Inquiry screen (see Figure 18), click the Payment Scheduled Report tab.

   Information for the Payment Scheduled Report displays (see Figure 32).
2. Click Select next to Vendor ID(s).

   A list of approved Vendor IDs assigned to you displays (see Figure 33).

3. Click the checkbox next to the Vendor ID you want to run a query against (required field).

   **NOTE:** Click **Select All** to select all Vendor IDs in the list.

4. Click Submit.

   The selected Vendor ID(s) display (see Figure 34).
5. Click Search.

The search results display at the bottom of the screen (see Figure 35).

**Figure 35. Payment Scheduled Report search results**

### 4.4. Scheduling a Report

If there are more than 500 search results, you can schedule an offline report. When more than 500 results are available, the following message displays:

```
Total Number Of Records Found: 1843

Your search returned more than 500 claims. To generate a real-time report, please adjust your search parameters or you may schedule the report to retrieve details of all the claims found. You will be notified via email once your report is available to view / extract.
```

**Figure 36. More than 500 claims found**

1. Click Schedule Report.

The Schedule Offline Report window displays (see Figure 37).
2. Select the radio button next to the desired output type (Excel or Comma Separated Values).

3. Click Schedule.

Your report is scheduled and the following message displays:

4. Click Close.

5. Click **Scheduled Reports** from the left navigation bar (see Figure 39).
A list of your scheduled reports displays (see Figure 40).

![My Scheduled Reports](image)

Figure 40. My Scheduled Reports

**NOTE:** Files are only available for one week. Available dates are shown in the right two columns.

6. When the report becomes available, click **Download File**.

   You are prompted to open or save the file (see Figure 41).

![Download file prompt](image)

Figure 41. Download file prompt

7. Click **Save**.

   You are prompted to Open the file, Open the folder the file is in, or View downloads (see Figure 42).

![Open or View](image)

Figure 42. Open or View

8. Click **Open**.

   The file results display (see Figure 43).
4.5. Exit System

To exit the system:

1. Click the down arrow to the right of your name at the top-right of the screen.

   A dropdown list displays (see Figure 44).

   ![Dropdown list](image)

   Figure 44. Dropdown list

Figure 43. Report Results file
2. Select Log off.
   You are logged out of the system.

5. Troubleshooting

5.1. Turning Compatibility Settings Off

CEP is compatible with Internet Explorer 11 (IE 11) and your compatibility settings should be blank. If your compatibility settings are turned on, you’ll receive an error message saying you are using an unsupported browser.

To turn compatibility settings off:
1. Go to the tools widget and select Compatibility View settings.
   The Compatibility View Settings window displays.
2. If any websites are listed in the Compatibility View area, select them and click
3. Remove. If any checkboxes are checked, clear them.
4. Select Close to refresh CEP and load the entry screen.

5.2. Regaining System Access

Access is granted with a provisional 90-day activity window. If you do not log into CEP within a 90-day period, your access to the application is removed. To regain access, contact your local CEP administrator.

To find out who your local CEP administrator is, contact CEP Customer Support at 1-512-460-5380.

5.3. Vendor ID Cannot be Verified Automatically

Create a case, reviewers review, and they approve or reject. You can review the status of your case in My Cases. For a list of rejection types, see Appendix A.

5.3.1. Vendor ID Does Not Exist

If the Vendor ID does not exist in the system, the case is closed automatically with a status of “Resolved-NotValid”.

**NOTE:** For a list of rejection types, see Appendix A

To resubmit:
1. Complete the *VA FSC Vendor File Request Form, VA Form 10091*.
2. Go to CEP > My Profile > Rejected.
   A list of rejected Vendor IDs displays (see Figure 45).
3. Select Resubmit next to the Vendor ID you want to resubmit.
   You are taken to the Registration screen (see Figure 7).
4. Enter the correct information and click Submit.
   You are asked if you have submitted your 10091 form (see Figure 46).

5. Select Yes.
   The information is updated and the window closes. If you have any issues, contact your system administrator.

### 5.3.2 Vendor ID Rejected

A file can be rejected for a variety of reasons.

**NOTE:** For a list of rejection types, see Appendix A.

When resubmitted, these cases can be approved/rejected by the CEP Approver/Manager.

To resubmit:

1. Go to CEP > My Profile > Rejected.
   A list of rejected Vendor IDs displays (see Figure 47).
2. Select Resubmit next to the Vendor ID you want to resubmit.
   You are taken to the Registration screen (see Figure 7).

3. Enter the correct information and click Submit.
   You are asked if you have submitted your 10091 form (see Figure 48).

4. Select No.
   The information is updated and the window closes. If you have any issues, contact your system administrator.
### Acronyms

<table>
<thead>
<tr>
<th>Acronym</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>CEP</td>
<td>Customer Engagement Portal</td>
</tr>
<tr>
<td>FSC</td>
<td>Financial Services Center</td>
</tr>
<tr>
<td>VA</td>
<td>Veterans Affairs</td>
</tr>
<tr>
<td>DoD</td>
<td>Department of Defense</td>
</tr>
<tr>
<td>CAC</td>
<td>Common Access Card</td>
</tr>
<tr>
<td>PIV</td>
<td>Personal Identity Verification</td>
</tr>
<tr>
<td>FAQ</td>
<td>Frequently Asked Questions</td>
</tr>
<tr>
<td>EFT</td>
<td>Electronic Funds Transfer</td>
</tr>
</tbody>
</table>
Appendix A. Rejection Status

The following is a list of rejection statuses.

<table>
<thead>
<tr>
<th>Status</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Resolved-NotValid</td>
<td>&quot;Resolved-NotValid&quot; means the requested Vendor Id does not exist in the Financial Management System (FMS).</td>
</tr>
<tr>
<td>Resolved-Approved</td>
<td>This occurs when the CEP Approver/Manager approves the registration request.</td>
</tr>
<tr>
<td>Resolved-Denied</td>
<td>This occurs when the CEP Approver/Manager rejects the registration request.</td>
</tr>
<tr>
<td>Resolved-Completed</td>
<td>The “Resolved-Completed” status is set to the External Parent case (RGE-) when all its child cases (RGV-) are resolved.</td>
</tr>
<tr>
<td>Resolved-Reactivated</td>
<td>This occurs when the CEP Approver/Manager approves the reactivation request.</td>
</tr>
<tr>
<td>Pending-Resubmitted</td>
<td>This occurs when an external vendor Resubmits the Rejected Vendor ID request for approval.</td>
</tr>
<tr>
<td>Pending-AutoApproval</td>
<td>The “Pending-AutoApproval” status is set to Parent case (RGE-) when a registration request is submitted.</td>
</tr>
<tr>
<td>Pending-Hold</td>
<td>This occurs when the CEP Approver/Manager pends the case.</td>
</tr>
<tr>
<td>Pending-Escalate</td>
<td>This occurs when the CEP Approver escalates the case to a Manager.</td>
</tr>
<tr>
<td>Pending-Review</td>
<td>This occurs when the case needs to be reviewed by the CEP Approver/Manager.</td>
</tr>
</tbody>
</table>