Enrollment System 5.17
User Guide-Quick Start

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Department of Veterans Affairs
Office of Information and Technology (OIT)

Revision History

Date	Revision	Description	Author
08/21/2021	35.0	**ES V5.17** added the following: Introduction updates include clearer text on adding and updating beneficiary records and to include "VAMC" for reviewing workload cases pg. 1; Added "1.2.1 Release Updates and Enhancements" section linking to production "Release Updates" topic on the online help, pg. 1; Removed ESR v3.0 and v3.1 from the "1.2 Overview" section, pg. 1 and placed in the "Release Updates and Enhancements" section of the webhelp; Updated Austin Information Technology Center section for better readiblity, pg. 2; Updated Browser & Operating System Compatibility section to include current compatibility noting that IE is no longer used, and Firefox is not permitted, pg. 4; Added "permissions" note to "Autofill Functionality in Chrome" section; Removed "accept agreement" in the ES "autofill" steps; Deleted "Autofill Functionality in Chrome" section; "Reason Eligibility Status is Pending Verification" dropdown list with "OTH (Other than Honorable) Pending 20-0986" on the Current Eligibility, Edit Current Eligibility, and Edit Current Eligibility (Add a Person) screens, pgs. 11-12; Updated "Document Name" dropdown list; archived previous document names on the Document Management screen, pgs. 13-14	TeamLibertyTW

Artifact Rationale

Per the Veteran-focused Integrated Process (VIP) Guide, the User Guide-Quick Start 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-Quick Start is a technical communication document intended to give assistance to people using a particular system, such as the Enrollment System (ES). 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 quick start 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-Quick Start 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.

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1. Introduction

The Enrollment System (ES) is the primary Veterans Affairs (VA) system used to manage VA health benefits.

ES allows staff at the Health Eligibility Center (HEC), located in Atlanta, Georgia, to work more efficiently and determine patient eligibility in a timelier manner. Messaging with the VAMC (Department of Veterans Affairs Medical Center) allows for the adding and updating of beneficiary records to the enterprise enrollment system to be shared with the field.

ES is one component of the "system of systems" needed to implement the Health*e*Vet REE (Registration, Eligibility & Enrollment) environment.

ES's two main functions are:

- Expert System (Messaging) provides a seamless bi-directional interface with external Veterans Health Administration (VHA) and non-VHA systems for data exchange of Veterans' information.

- Work Flow (Case Management) that provides authorized VHA case representatives at the HEC and VAMC with a web interface to easily track, maintain, and manage cases associated with Veteran benefits. HEC and VAMC staff utilize ES to manage these "cases" to completion so that verified Eligibility & Enrollment can be determined.

1.1. Purpose

The purpose of this user guide is to familiarize users with important features and navigational elements of the ES application.

1.2. Overview

President George W. Bush established a task force for returning Global War on Terror (GWOT) heroes who resulted in enhancements that improved delivery of Federal services and benefits to GWOT service members and Veterans. Among recommendations associated with task force was to focus on enhancing delivery of services and information to GWOT service members and Veterans within existing authority and resource levels.

1.2.1. Release Updates and Enhancements

Click the link to view current and past ES release updates and enhancements on the online help.

1.2.2. Organization of the Manual

This User Guide-Quick Start guide contains the following:

- Introduction
- System Summary
- Getting Started
- Significant Additions and Updates to ES Version
- Troubleshooting

1.2.3. Assumptions

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

- User has basic knowledge of ES (such as the use of commands, menu options, and navigation tools).
- User has been provided the appropriate active roles, menus, and security keys required for ES.
- User is using ES to do their job.
- User has validated access to ES.
- User has completed any prerequisite training.

1.2.4. Austin Information Technology Center

Installation, maintenance, and monitoring of ES updates are performed at the Austin Information Technology Center (AITC) on the third Saturday of each month.

1.2.4.1. 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.

1.2.4.2. Documentation Disclaimer

The appearance of external hyperlink references in this manual does not constitute endorsement by 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.

1.2.5. Documentation Conventions

This Quick Start uses several methods to highlight different aspects of the material.

- Various symbols are used throughout the documentation to alert the reader to special information. The following table gives a description of each of these symbols:

1.2.6. Project References

Refer to the following Enrollment System references:

- ES 5.17 Release Notes
- ES 5.17 Online Help

1.3. National Service Desk and Other Contacts

<p align="center">Table 1: Support Contact Information</p>

Name	Org	Contact Info
OIT National Service Desk	OIT	• Agent Live Chat: Click the "Chat with us now" button in the lower right corner of the <u>yourIT Service portal</u> to launch Abel the Chatbot and type "chat with agent" • Self-Service: <u>Create Incident</u> • Phone: 855-673-4357 • TTY (hearing-impaired only): 844-224-6186
VistA Patch Maintenance	OIT	Use the <u>yourIT Service portal</u> – A ServiceNOW (SNOW) ticket is entered and the ticket assigned to the "NTL SUP Admin Team".

2. System Summary

NOTE: *Users require group membership to access SharePoint and Teams' links. To request access, contact the E&E Program Management Office (PMO) or use the request access option at the SharePoint site and specify group membership.*

2.1. System Configuration

Please refer the Enrollment Health Benefits Determination (EHBD) Technical and Architectural Roadmaps on the ES SharePoint <u>here</u>.

2.2. Data Flows

Please refer to the Production Operations Manual (POM) on the ES SharePoint <u>here</u>.

2.3. User Access Levels

See the **Buttons/Admin** section where **User Accounts**, **Profiles**, **Roles** and **Capability Sets** explain the different user access levels of the ES.

2.4. ESM Application Information System Contingency Plan

Please refer to the Enrollment System Modernization (ESM) Application Information System Contingency Plan on the ES SharePoint <u>here</u>.

2.5. ESM Project Artifacts SharePoint Site

Click the following <u>link</u> to access the ESM Project Artifacts SharePoint site.

2.6. Browser & Operating System Compatibility

ES is functional through Windows using Chrome or Edge.

NOTE:	*Internet Explorer (IE) and Firefox are not supported browsers. Users who have permission to have Firefox should not be using it to access ES.*

3. Getting Started

3.1. Enrollment System (ES) Layout

ES displays a beneficiary's record data. The "Menu Bar" and the "Person Search Tabs" provide access to various screens for viewing, updating, adding, and deleting information on ES.

Menu Bar

Menu Bar is where utility buttons for ES are located. From the Menu Bar, users view Worklists, perform Veteran Merges, perform Health Level 7 (HL7), Community Care Network (CCN), Third-Party Administrator (TPA) and Military Service Data Sharing (MSDS) Message Searches, Load Registries, do an Undeliverable Mail Search, Generate/View Reports, Reference Thresholds/Enrollment Group Threshold (EGT) Settings, view Veterans Online Application (VOA) Re-submissions, Search and Add a New Person, and perform general Administrative functions such as enable or disable Veterans Community Care Eligibility (VCE) parameters.
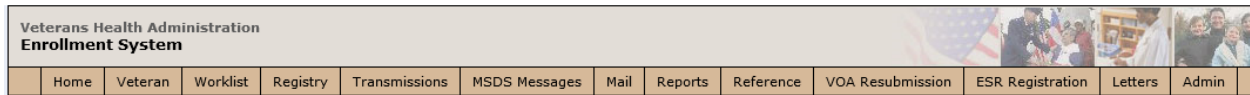

Figure 1: Menu Bar

Summary

The Summary displays the beneficiary's Name, social security number (SSN), date of birth (DOB), date of death (DOD), Enrollment Status, Member ID (if available), and any other important information such as Open Work Items, Pending Merges, Sensitive Records, etc..

Sensitive Record information, if disclosed to the individual, may have serious adverse effects on the individual's mental or physical health. Such information may require explanation or interpretation by an intermediary or assistance in the information's acceptance and assimilation in order to preclude adverse impacts on the individual's mental or physical health.
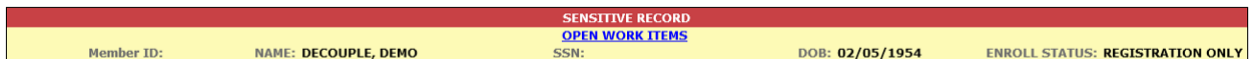

Figure 2: Summary with a Sensitve Record

Person Search Tabs

Person Search Tabs are the area of the screen where the user may access the various kinds of information on record for the beneficiary to aid in determining his or her eligibility for enrollment in the VA healthcare system.

Figure 3: Person Search Tabs

NOTE: *The terms* Veteran, beneficiary, patient, *and* applicant *are used interchangeably throughout ES. While not all applicants are Veterans or patients, not all applicants are beneficiaries either. Whether they are a Veteran, patient or beneficiary is determined AFTER the application for benefits is received and processed.*
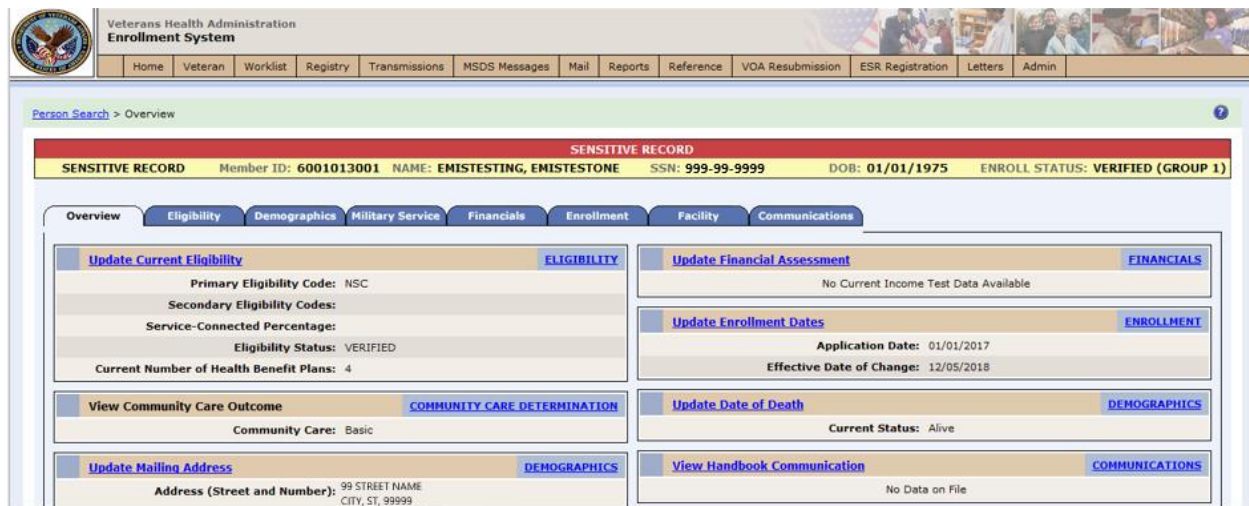
Figure 4: Summary and Main Screen on ES

Sorting Columns

For screens that contain listed data, ascending and descending sorting may be performed for any category by clicking on the category name or on the symbol . Re-clicking the category name or symbol re-sorts the previous sort.

Figure 5: Sorting Columns

ES Online Help is an Online Help system built in Adobe RoboHelp, an authoring and publishing tool. The ES Online Help delivers an output to ES users when clicking the context-sensitive help buttons, **System Help** or **Screen Help**.

3.2. ES Online Help

In ES, you can obtain information about windows or dialogs clicking the context-sensitive help button 🔵 available ES in the upper right-hand corner of the "System Help" and "Screen Help".

System Help:

> System Help is the top upper-right context-sensitive help button 🔵.

Screen Help:

> Screen Help is the lower upper-right context-sensitive help button 🔵.

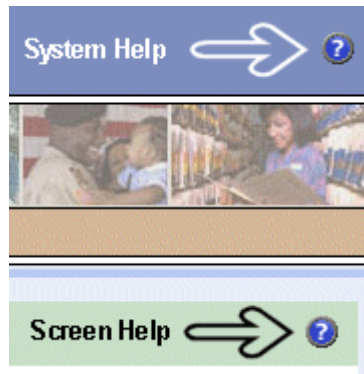| NOTE:	*If you roll over the Help icons in ES, screen tips will appear distinguishing between "System Help" and "Screen Help".*

Figure 6**: System Help and Screen Help**

(an online Table of Contents (TOC) is a summary of your project with topics arranged by category)

ES Online Help Tool Bar

To the left of the ES Online Help, above the table of contents pane, a tool bar contains *Contents, Index, Search* and *Glossary* links.

Table of Contents:

Contents displays an expanded table of contents.

- Collapse / Expand (⊕ , ⊖)

- Topics (🗋) are categories of information in the ES Online Help. Clicking 🗋 , you can view the contents of topic in the main screen located to the right.

Index:

Index displays a multi-level list of keywords and keyword phrases. These terms are associated with topics in the ES Online Help and the keywords are intended to direct you to specific topics within the ES Online Help. Click the keyword to launch a topic from the TOC to the main screen. If the keyword is used with more than one topic, a list of topics displays under the keyword or keyword phrase in which the keyword or keyword phrase appears.

Search:

Search provides a way to explore the content of the ES Online Help and find matches to ES-defined words. Unlike Index that lists author-defined keywords such as terms, synonyms, and cross-references, Search lists words used within the content of topics. To find a topic in which the word appears, click the letter link to display the words that begin with the letter being searched for. Words that appear once are in bold. Words that appear in multiple topics are listed with numbers. Click on a number to display the topic in the right-hand pane in which the word appears.

Glossary:

Glossary provides a list of terms and definitions related to the subject-matter in ES. Click a letter in the top pane and see corresponding definitions that begin with the letter clicked in the lower pane.

The Enrollment System Help text uses Adobe RoboHelp's 2017 WebHelp as its output and is 508-compliant. The Online Help opens in your web browser as a new window.

Other buttons and functions

Hide/Show the left pane

Provides a larger viewing area of the open topic and hides the left pane.

1. Click the **Hide** link in the upper left side of the right pane to hide the left pane.

2. Click the **Show** link in the upper left side of the pane to show the left pane.

Browser Toolbar

Since there is not a browser toolbar at the top of the ES Online Help window, right-click within ES Online Help window and select either **Back** or **Forward** to go back and forward through the history of visited topics, print a topic, or perform other tasks available within the Windows context-sensitive commands.

| NOTE:	*The **Forward** command is only available if the **Back** command has been used first. At that point the **Forward** command becomes available.*

The TOC on the left side of the ES Online Help can also be used to navigate throughout the ES Online Help.

WebHelp Build Date

Click the **Systems Parameters** topic to view the WebHelp Build Date. The build date is next to the topic title.

Adjusting the main screen and TOC size

Adjust the width and height of the main screen window by dragging the edges of the window in or out.

Adjust the width of the table of contents pane by pointing to the right edge of the left pane until the mouse pointer turns into a line with arrows on each end: ↔ Drag the pane to the right or left with the left mouse button held down.

Navigating Help Topics

NOTE:	*The following navigational techniques generally refer to the Online Help, where indicated, and not the written documentation:*

Links (Online Help)

✱ symbol indicates a required field in the Online Help.

★ symbol indicates a required field in the user guide.

⊘ symbol is displayed when a submitted field has an error.

🔄 symbol ("data changed") is displayed when a type of data has changed on the *History*, *Veteran Merge*, and user-related confirmation windows.

NOTE:	*Indicates a note or item of special interest.*

3.3. 508 Compliance & Accessibility

With every release, the Department of Veterans Affairs strives to improve accessibility in the Enrollment System through the World Wide Web Consortium (W3C)'s Web Content Accessibility Guidelines (WCAG) 2.0, Levels A and AA.

It's important to mention that because Adobe RoboHelp displays a leveled hierarchy of contents through expanded and collapsed icons. Enrollment System users must click the collapsed ⊕ icon to display contents 🗋 for that section and re-click the expanded ⊖ icon to close the contents of that section.

3.3.1. Accessibility Software

The table below lists accessibility software used to assist disabled users with the Enrollment System.

Table 2: Accessibility Software

Accessibility Software	Description	Keyboard Shortcuts
Jaws (Job Access with Speech)	Assists blind and visually impaired Veterans with reading screens on ES either with a text-to-speech output or a Braille display.	JAWS Keystrokes
Window-Eyes	Reads specific text on an ES screen to a disabled Veteran.	Window-Eyes Manual
MAGic	Magnifies ES screens to varying levels and assists Veterans with screen reading.	MAGic Keystrokes
ZoomText Magnifier / Reader	Magnifies ES screens to varying levels and assists Veterans with screen reading.	ZoomText Tutorial
Dragon Naturally Speaking	Through dictating ES functions, assists disabled Veterans with ES document downloads and exports.	Dragon NaturallySpeaking User Documentation

If you have questions or comments regarding Adobe RoboHelp 2017 accessibility, please contact the Adobe Accessibility Team and provide feedback on their feedback form. For further information on Adobe accessibility, please refer to the following link:

https://www.adobe.com/accessibility/508standards.html

3.4. Standard Data Service (SDS) Lookup Tables

The SDS is a repository of enterprise-level reference tables. The SDS Lookup Tables contain information needed to define requirements and research the E&E process. The SDS Lookup Tables page enables a user to view information about a specific table (for example, table name, code, description, active status, date when a code became inactive). ES uses SDS tables in several of its applications.

- Users access the SDS Lookup Tables screen by clicking the Reference Tables link at the top right of any ES screen.

- To display the SDS Lookup Tables:
    1. Click the Reference Tables link and the SDS Lookup Tables page displays. SDS table and SDS History table names are listed in alphabetical order in the Navigation Bar.
    2. Select an SDS table name from the navigation bar. The right panel displays the first five columns in the selected table and the Table Name contains a link for downloading the whole table as an Excel spreadsheet.   The Excel spreadsheet will display all the columns in the table.
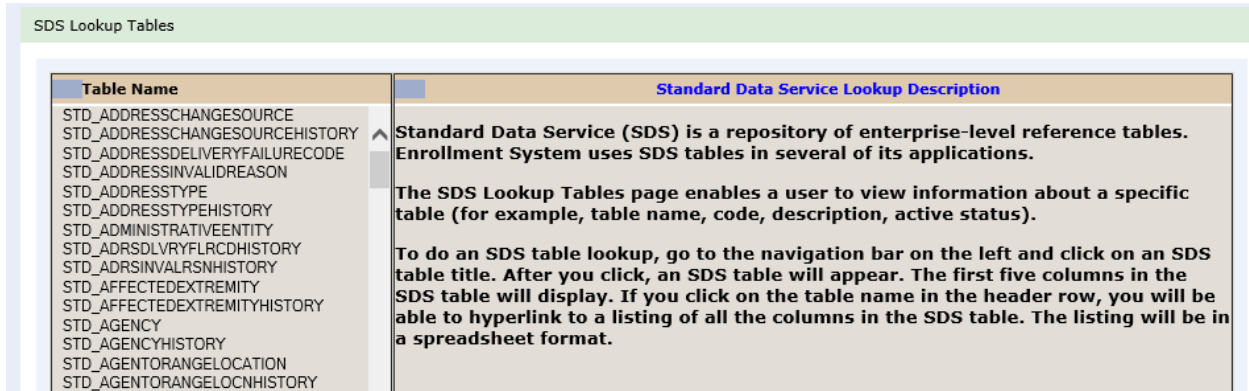

Figure 7: SDS Lookup Table

No data found for the selected table displays if there is no data in an SDS Lookup Table.

3.5.　Exiting ES

To exit ES, click on the **Sign Out** link at the top of any page.
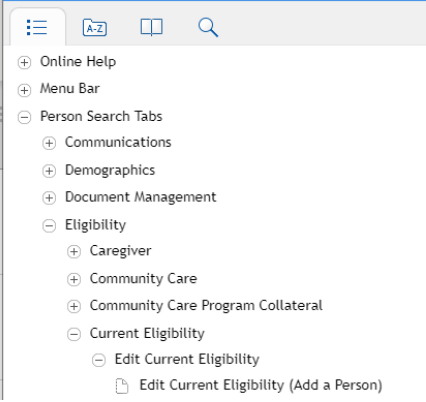
3.6.　Caveats and Exceptions

None.

4.　Significant Additions and Updates to ES Version 5.17

Please refer to 5.17 additions in below.

4.1.　OTH (Other Than Honorable) Pending 20-0986
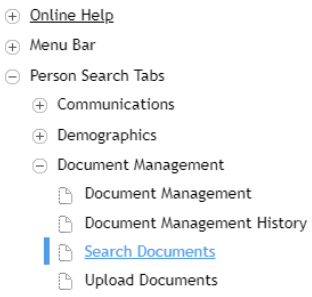
Confirm the following online help updates.

Step	Action
1	Click the following folders and topics on the table of contents:

Step	Action
	1. Person Search Tabs 2. Eligibility 3. Current Eligibility 4. Edit Current Eligibility (Add a Person)
2	Scroll down to the **Reason Eligibility Status is Pending Verification** field.
3	Confirm the highlighted text of "OTH (Other Than Honorable) Pending 20-0986". **Reason Eligibility Status is Pending Verification:** This allows the user to select a reason the eligibility status is pending verification. If "Other" is selected, a textbox is displayed to allow the user to enter a reason. This field is present when Eligibility Status is "Pending Re-verification" or "Pending Verification" and will be one of these values: • Active Duty • Blue Water Navy Pending 7131 **Notes:** • ES excludes records with the eligibility status of "Pending Verification" or "Pending Re-Verification" with reason of "Blue Water Navy Pending 7131" from the 365 Pending Closed Records process. • ES updates the "ORU/ORFZ11" messages to include "B" for Blue Water Navy as a valid value for the Agent Orange Exposure Location in the ZEL segment, data element "29". ES updates the rules to receive and process "ORU/ORFZ07" messages received from VistA with a value of "B" for Blue Water Navy as the Agent Orange Exposure Location in the ZEL segment, data element "29". • Demobilization • OTH (Other Than Honorable) Pending 20-0986 • Other • Pending Proof of Qualifying Military Service • Signature Required If the Veteran Indicator is "N", the Eligibility status must be Verified for non-Veteran message appears. ES automatically determines when a Veteran has a prior valid period of enrollment and displays that enrollment information to exclude the applicant from the 365-day letter.
4	Navigate back to the TOC.
5	Click the **Edit Current Eligibility** topic (still under the **Current Eligibility** folder).
6	Scroll down to the **Reason Eligibility Status is Pending Verification** field.
7	Confirm the highlighted text of "OTH (Other Than Honorable) Pending 20-0986".

Step	Action
	Reason Eligibility Status is Pending Verification: This allows the user to select a reason the eligibility status is pending verification. If "Other" is selected, a textbox is displayed to allow the user to enter a reason. This field is present when Eligibility Status is "Pending Re-verification" or "Pending Verification" and will be one of these values: • Active Duty • Blue Water Navy Pending 7131 **Notes:** • ES excludes records with the eligibility status of "Pending Verification" or "Pending Re-Verification" with reason of "Blue Water Navy Pending 7131" from the 365 Pending Closed Records process. • ES updates the "ORU/ORFZ11" messages to include "B" for Blue Water Navy as a valid value for the Agent Orange Exposure Location in the ZEL segment, data element "29". ES updates the rules to receive and process "ORU/ORFZ07" messages received from VistA with a value of "B" for Blue Water Navy as the Agent Orange Exposure Location in the ZEL segment, data element "29". • Demobilization • OTH (Other Than Honorable) Pending 20-0986 • Other • Pending Proof of Qualifying Military Service • Signature Required If the Veteran Indicator is "N", the Eligibility status must be Verified for non-Veteran message appears. ES automatically determines when a Veteran has a prior valid period of enrollment and displays that enrollment information to exclude the applicant from the 365-day letter.

4.2. Updated "Document Name" dropdown list; Archived Document Names

Confirm the following online help updates.

Step	Action
1	Click the following folders and topics on the table of contents: 1. Person Search Tabs 2. Document Management 3. Search Documents topic ⊕ Online Help ⊕ Menu Bar ⊖ Person Search Tabs ⊕ Communications ⊕ Demographics ⊖ Document Management 📄 Document Management 📄 Document Management History 📄 Search Documents 📄 Upload Documents
2	Scroll down to the **Income Verification Document (IVD)** field.
3	Confirm the highlighted bulleted list. When the user selects "IVD" from the **Document Type** dropdown, the following options display under the **Document Name** dropdown: a. Federal Income Tax Forms with schedules and attachments b. W2 c. 1099/All d. 1098/All e. Gambling Receipts/All f. Medical Receipts/All g. Education Receipts/All h. Burial/Funeral Receipts/All i. Real Estate Documents/All j. Royalty Statements k. Dependent Information/All l. Proof of Marriage/All m. Proof of Divorce/All n. Appeals/All o. HEC 200-1A p. HEC 220-1/2 q. Declaration of Representative r. Power of Attorney s. Congressionals t. Misc. Documents
4	Navigate back to the TOC.
5	Click the **Upload Documents** topic (still under the **Document Management** folder).
6	Scroll down to the **Income Verification Document (IVD)** field.

Step	Action
7	Confirm the highighted text.

When the user selects "IVD" from the **Document Type** dropdown, the following document names, added in the 5.17 ES release, display under the **Document Name** dropdown:

- Federal Income Tax Forms with schedules and attachments
- W2
- 1099/All
- Appeals/All
- HEC 200-1A
- HEC 220-1/2
- Declaration of Representative
- Misc. Documents

The following document names no longer display under the **Document Names** dropdown when "IVD" document type is selected as of the 5.17 ES release, but are still available for users to search if needed:

- 1098/All
- Gambling Receipts/All
- Medical Receipts/All
- Burial/Funeral Receipts/All
- Real Estate Documents/All
- Royalty Statements
- Dependent Information/All
- Proof of Marriage/All
- Proof of Divorce/Separation
- Power of Attorney
- Congressionals

5. Troubleshooting

Please refer to the Troubleshooting section of the Production Operations Manual (POM) on the ES SharePoint.