**Beneficiary Travel Self-Service System (BTSSS)**

**User Guide**

****

**March 2017**

**Department of Veterans Affairs**

**Office of Information and Technology (OI&T)**

Revision History

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

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**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.

Note: Assistive Technology users who need to view this document in braille format or large print should contact should contact the VA 504 Reasonable Accommodation office at 1-844-MYVA311.

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# Introduction

The Department of Veterans Affairs (VA) operates the nation’s largest integrated health care network, operating over 150 hospitals, over 130 community living centers, and over 900 outpatient clinics. There are over 8.5 million Veterans enrolled in the VA health care system, with over 5.5 million Veterans using the Veterans Health Administration (VHA) health care system in any given year. In addition to the health care facilities available for the Veteran, the VA has authority to provide, to eligible persons, reimbursement for mileage driven in a private vehicle and transportation by common carrier/public transportation (plane, bus, taxi, etc.). In addition, when medically justified by a VA health care provider, special mode of transportation (ambulance, wheelchair van, etc.) may be approved for Beneficiary Travel (BT)-eligible Veterans. The eligible Beneficiary requests travel reimbursement through the BT program.

In 1978, the VA travel mileage reimbursement rate was 11 cents per mile; the rate was increased to 28.5 cents per mile in February 2008; and increased again, in November 2008, to 41.5 cents per mile. As a result, BT experienced significant growth in both use and cost. BT is now one of the most highly funded federal transportation programs for people with special needs. In December 2009, the VHA reported that, following the mileage rate reimbursement increase in November 2008, mileage claims grew by 76 percent, with a 30 percent increase in the number of Veterans claiming travel reimbursements.

The VHA estimates that if all Veterans eligible for mileage reimbursement sought it, the VA would incur expenses in excess of $1.5 billion per year. BT obligations were approximately $861 million in Fiscal Year (FY) 2012; starting in 2010, the VHA began a series of initiatives to improve oversight of the BT and travel reimbursement claims processing. The Beneficiary Travel Self-Service System (BTSSS) is a portion of the BT overall improvement effort.

The VA seeks to advance the BT program by creation of a web-based beneficiary self-service application that will automate claims submission and travel reimbursement payment. The current travel reimbursement process is manual, time consuming, and requires the assistance of a VA clerk. The BTSSS will continue the efforts of the VA to improve its services to Veterans, and reduce long-term costs, by streamlining the travel claim and reimbursement process.

The BTSSS will provide features and capabilities that leverage automation and multiple user-interface capabilities to manage and process BT claims, common in commercial software. The VA plans to acquire a Commercial Off-the-Shelf (COTS) software product that can be customized to integrate with the VA’s Veteran identification systems for records and the appointment scheduling systems.

## Purpose

The purpose of this document is to familiarize users with the important features and navigational elements of the new BTSSS tool.

## Document Orientation

### Organization of the Manual

This user guide was written for Veterans who utilize the current VistA application for reimbursement of travel expenses for visits to VA facilities, as well as travel clerks and other administrators of the travel expense and reimbursement process.

Table 1: Organization of the Manual

| Document Section | Description |
| --- | --- |
| Introduction | This section contains introductory content regarding the BTSSS project and this document, including BTSSS background information, how the user guide is organized, and user assumptions. |
| System Summary | This section includes technical and functional details about BTSSS, including descriptions of features, and system diagram, and the flow of the data. |
| Getting Started | This section details how to access BTSSS, navigate within the system, and exiting the system. |
| Using the Software | This section instructs the user how to use BTSSS. There will be subsections for the different roles accessing BTSSS. |
| Troubleshooting | This section contains details around any issues or confusion that may arise while using the system and what to do to address each issue. |
| Acronyms and Abbreviations | This section is a list of the acronyms and abbreviations used in this guide and the meaning of each. |
| Appendix | N/A |
| Index | N/A |

### Assumptions

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

* User has basic knowledge of the Windows operating system (such as the use of commands, menu options, and navigation tools).
* User has been provided the appropriate active roles, menus, and security keys required to use BTSSS.
* User is using BTSSS for activities related to processing expense reimbursement claims.
* User has validated access to BTSSS as the appropriate role.
* Travel Clerk, Super Application User, Business User, and System Administrators users have basic knowledge of the Microsoft Customer Relationship Management (CRM) application (such as the use of commands, menu options, and navigation tools) and have been trained on using BTSSS.

### Coordination

The following organizations within the VA may require coordination with the implementation and use of the system by its targeted user base.

* The Travel Clerks responsible for processing claims.
* Financial Management System (FMS) users responsible for approving payments.
* Treasury users responsible for making financial deposits.
* All VA facilities with kiosks and Travel Clerks providing the ability to process claims.
* The VA Information Technology (IT) Help Desk responsible for supporting BTSSS.

### Disclaimers

#### Software Disclaimer

This software was developed at the 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.

#### Documentation Disclaimer

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

### Documentation Conventions

Navigation through the system will be depicted as screenshots using figures.

### References and Resources

List of reference documents.

## National Service Desk and Organizational Contacts

Users should continue to reference existing points of contact for information and troubleshooting purposes in place for VistA and the expense reimbursement process.

# System Summary

The new travel reimbursement solution, the BTSSS, will interface with existing VA systems that provide Veteran information, identity and access control, and Electronic Funds Transfer (EFT) information. The Veteran, or a non-Veteran claimant, will be able to submit their own claims, receive claim status, and file an appeal. The VHA will be able to generate liability, expenditure, and other BT reports to provide the oversight mandated by Office of Inspector General (OIG). The BTSSS needs to be web-based and accessible through the following means:

* Using standard web-browsers.
* Being integrated with VA self-service portals, such as MyHealtheVet and eBenefits.
* Using Veteran Point of Service (VPS) Kiosks located in VA medical facilities.

The BTSSS will need to provide many of the features and capabilities found in the typical third-party expense management services and solutions. These can be summarized as:

* The ability to create a user profile with contact and financial information, which is used for EFT payment.
* The ability to create expense entries.
* The ability to upload scanned images of receipts and supporting documentation and link these to the expense entries.
* The ability to plan for future BT.
* The ability to submit expenses for either manual or automatic review for approval.
* The ability to receive the payment in the form of an EFT transaction.
* The ability to improve Business Intelligence and Reporting.

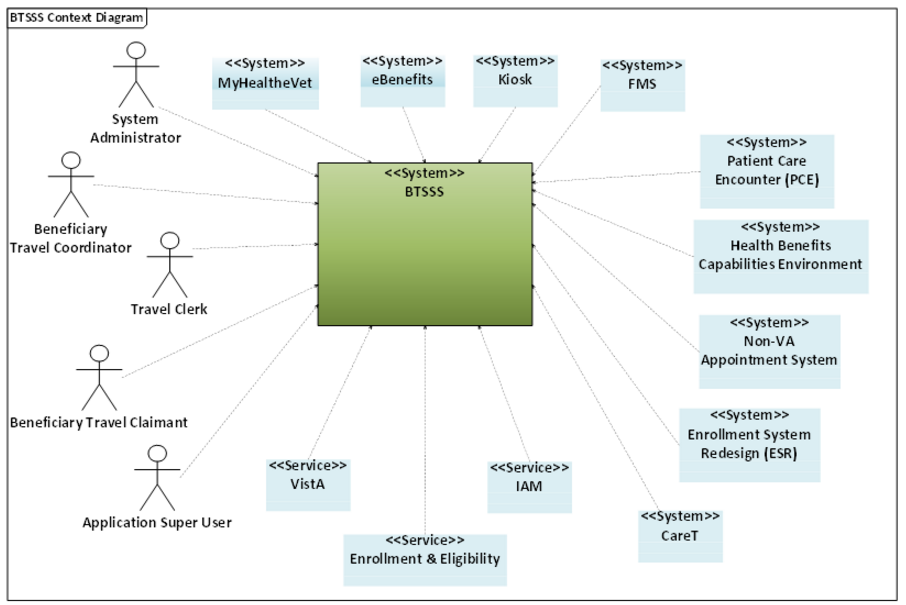
The main difference between the BTSSS and the typical third-party expense management services and solutions is the need to evaluate claims based on the VA BT rules and guidelines, and using Medical Appointment and Eligibility information found in external VA systems. The BTSSS Requirements Specification Document (RSD) specifies the functional and non-functional requirements of the BTSSS. The BTSSS solution replaces the existing BT program functions performed by the current process and systems, while adding the following key features and capabilities:

* Support for EFT Payment: A central Business Need (BN) is to eliminate BT cash reimbursement payments and to alleviate the lines at the facilities. The BTSSS will be a key to moving to this new cashless model.
* Support for Veteran and Non-Veteran BT Claimants: The BTSSS will support the creation of BT profiles for both Veterans and non-Veteran BT Claimants to ensure efficient processing and payment.
* Support for Multiple User Interfaces and Modes: The BTSSS will be accessible via the following user interfaces:
  + A standard desktop web browser (for example, PC Desktop, laptop, etc.). This is to ensure quick deployment of the solution and immediate use.
  + A user interface optimized for use on VA VPS Kiosk devices.
* Support for Submission of Receipts and Non-Receipt Expenses: The BTSSS will support the ability to submit expenses that require a receipt (for example, air travel) and expenses that do not require a receipt (for example, mileage expense).
* Support for Submission of Expense Report: The BTSSS will support the ability to submit an “expense report” composed of expense entries with scanned images of the supporting documentation. The supporting documentation is used to document expenses for meals/lodging, other expenses (for example, tolls), other transportation modes (for example, air travel), and special mode.
* Ability to Plan for Future BT: The BTSSS will need to provide the BT claimant the ability to plan for future trips. This would entail allowing the BT claimant to submit information for a particular future appointment and receive information from the BTSSS about how the claim may be adjudicated (for example, the eligibility of the trip for BT reimbursement and, if eligible, the estimated reimbursement amount).
* Business Intelligence and Reporting: The BTSSS will need to include the ability to produce a range of reports to ensure that the solution is effective and meets the goals and objectives of the Business Owners.

## System Configuration

The figure below shows the possible users and systems that the BTSSS will interact with to process claims.

Figure 1: System Configuration



## Data Flows

The figure below shows all the possible states and processes through which a claim can flow to reach an end state of Claim Paid or Closed with No Payment.

Figure 2: BTSSS State Machine Mapping



Listed below are all the possible states of a claim from *Claim Initiation* to *Claim Paid* or *Closed with No Payment.*

States:

1. Claim Initiation – Beneficiary Claimant, Caregiver, or Travel Clerk starts a travel claim associated with either a future appointment or a completed appointment.
2. In Process – the claim has been saved and eSigned by the Beneficiary Claimant, Caregiver, or Travel Clerk and processing of the claim is started.
3. Pending – the claim contains expenses other than just mileage or the mileage submitted is not within the limit for the claimant and requires human intervention.
4. Manual Review – the claim cannot be processed programmatically because it includes receipts; the mileage is not equal to or less than the calculated limit; the eligibility requirements are not met. This area of the BTSSS process needs expanding to include all of the decision making made during the review processing to better understand the steps involved.
5. Appeal – claimant must decide whether to appeal the denial of the claim and reapply or allow the claim to be archived.
6. Denied – a problem has been determined that has resulted in the claim being denied. The claimant is informed of this decision and provided with information on how to appeal the decision.
7. On Hold – more information is needed to process this claim. The claimant is informed of the status and provided with information about what is needed and the process for getting that information.
8. Submitted for Payment – the claim has been authorized and can now be sent to the Treasury Department.
9. Closed with no payment – no payment will be made on this claim and it will be archived.
10. Claim Paid – the fund transfer has been completed and the claim has been closed.

Processing:

1. Enter claim for either future or past appointment

Either a Beneficiary Claimant, a Caregiver, or a Travel Clerk will fill out the information required for a claim. This information can be added all at one time or during multiple sessions. It is possible to enter information for a claim associated with an appointment that has already been kept or for one in the future. The claim can be simply for mileage reimbursement or can also include reimbursement requests for hotel and other expenses associated with the appointment.

1. Changes made to claim or data source by claimant or by Travel Clerk

Since claims are not necessarily completed during a single session this step takes into account the ability to modify a claim that has been started but not submitted, a claim that was put On Hold and requires more information, and a claim that was denied and went thru an appeal process. Changes to the claim can be made by the Beneficiary Claimant, a Caregiver, or a Travel Clerk.

1. Claim expired?

At this point the date of the appointment associated with the claim is checked to insure that it is still within the 30-day time limit. If it is more than 30 days after the appointment date, then the claim is marked as expired and archived.

1. While in this state, submission expiration is checked and reminders sent weekly once appointment is kept

When a claim has been started but not submitted it goes thru a couple of checks on a daily basis. Once the appointment associated with the claim has taken place then a check is made on whether the claim is past the 30-day limit. Additionally, on a weekly basis a reminder is sent to complete the claim once the appointment has been kept.

1. Ready to Save?

Once claim information is entered a choice needs to be made as to whether the claim is complete and ready to be submitted.

1. Add eSignature

At this point the claimant must provide an eSignature attesting to all of the information on the claim being correct.

1. Error Checking – required content and eligibility tests

Error checking is done at this point to make sure all required information has been collected (profile, address, banking information); that eligibility requirements have been met; and that the eSignature has been collected for the claim.

1. Communication with claimant that error found and updates are required

When an error is found with a claim, the claimant is alerted to the errors and asked to correct them. Any required explanation is also included.

1. Errors?

The next step in the process is determined by the results of the error checking. If the claim has no errors, then the processing of the claim can continue. Otherwise processing goes back to the claimant.

1. Claim for future appointment?

A check is made to determine whether the appointment associated with the claim is marked as completed.

1. Claim is checked daily for completed appointment

Every day a workflow is run that checks for claims that have been submitted prior to the appointment to see if the appointments have been kept.

1. Appointment completed?

If the appointment has been completed, then the claim continues on to the In Process status. If not, then it returns to the pool of claims to be checked daily for a completed appointment.

1. Check claim to see if mileage only claim and if mileage reported is equal to or less than acceptable value

This step identifies ‘mileage only’ claims and compares the mileage reported with the calculated mileage between the physical address and the address of the facility associated with the appointment.

1. Meets criteria?

If the claim is a mileage only claim and meets the mileage limitations, then the claim goes to the Pending state. Otherwise the claim will need to be forwarded to the VA. This is where any criteria that can be checked that will allow for automating the payment process should take place. Mileage only claims is the obvious case but if criteria for processing any claims that include receipts can be determined, this is where those tests would be made.

1. Claimant obtains required information

Subsequent to having a claim put On Hold the claimant gathers the information requested and is ready to update the claim with this requested information.

1. Reviewed by VA

For claims that include receipts at this point it is necessary that the claim be manually reviewed insuring that each non-mileage expense be backed up by an appropriate receipt and that the amount of the expense for which reimbursement is being requested is within the guidelines.

1. Claim in order?

If there are no problems with the claim, then it continues on to the Pending state. Otherwise, it must be reviewed more in depth.

1. Appeal granted?

If an appeal is granted, then processing returns to updating the claim and resubmitting it. Otherwise, the claim will be archived and marked as closed.

1. Tokenized claimant’s EFT information sent to FMS

Once a claim has been reviewed by a travel clerk and all is found to be in order it is forwarded to FMS with tokenized EFT information.

1. Claimant drops claim?

After being alerted to a claim being placed On Hold and being made aware of the required information, the claimant may decide to not proceed any further with the claim. If they do not pursue the claim any further, then the claim will be archived and marked as closed. Otherwise the claim will need to be updated.

1. Problems?

If problems with the claim are found at FMS, then the claim must go to Manual Review. Otherwise the claim is ready to be Submitted for Payment.

1. Appeal is processed

The appeal is processed and a determination is made as to whether to grant the claim or not.

1. Claim reviewed – could be by multiple levels within VA

The VA goes thru whatever process they have for reviewing questionable claims. This area should be expanded to include the VA process and the tests they include for possible determination of rules to automate more of the process. May want to add additional States which reflect the manual handling of a claim and the steps a claim goes thru when being processed.

1. Appealed?

When a claim has been denied and the claimant informed of the reasons for the denial, they have the option of appealing. If they decide to appeal, then the claim goes to the Appeal process. Otherwise it is archived and marked as closed.

1. Decision?

As a result of the Manual Review process, a determination is made to deny, approve, or place the claim on hold. If denied, the claim continues to the Denied state.

1. BTSSS communicates with claimant – provides reason for denial and gives instructions for appeal

When a claim is denied the claimant is informed and the reason for the denial is passed on. They are also given instructions on how to appeal if they wish to do so.

1. BTSSS communicates with claimant – provides reason for On Hold and requests updates be made

When a claim is placed on hold, the claimant is informed of the reason for this status and the updates required to proceed.

1. Archive claim

All claims processed are saved. If they are not paid, then they are archived in case of any future need to access them. The claim is then closed.

1. Sent to Treasury

The final step of the payment process is for the claim to be sent to the Treasury Department for payment. The claim will then be marked as paid.

## User Access Levels

The table below describes the user roles and capabilities.

Table 2: User Roles and Capabilities

| User Role | Description | Capabilities |
| --- | --- | --- |
| BT Claimants | Represents a Veteran, Caregiver, or other party that is requesting BT reimbursement. | * Enter/View/Edit profile; * Enter/View/Edit claims (reimbursement requests) |
| Travel Clerk | Represents the person(s) responsible for assisting the BT Claimant with issues with their claim. May need to process the claim manually in some cases when exceptions or special situations are encountered. | * Enter/View/Edit profile; * Enter/View/Edit claims (reimbursement requests); * Approve requests; * Trigger/Send notifications. |
| Application Super User | Represents the person who is engaged in report design/customization, workflow design/modification, and parameters configuration setup/modification. | * Design/Edit Reports; * Design/Edit Workflow; * Enter/Edit Configurable parameters |
| Business User | Represents the person who utilizes the BTSSS data for business intelligence and reporting analysis. | * Run/View reports |
| System Administrator | Represents the person who has full control on the system. | * Full control. |

## Continuity of Operation

A disaster is defined as an incident which results in the loss of computer processing at one of the data centers in Microsoft Azure, to the extent that relocation to a Standby Facility must be considered. A disaster can result from a number of accidental, malicious or environmental events such as fire, flood, terrorist attack, human error, and software or hardware failures.

Specific goals of the plan are:

* To be operational within 1 day of a standby invocation
* To reinstate the development and testing environments within the maximum working standby period
* To minimize the disruption to the development and Quality Assurance (QA) resources

The Disaster Management Team is responsible for providing overall direction of the data center recovery operations. It ascertains the extent of the damage, activates the recovery organization, and notifies the team leaders. Its prime role is to monitor and direct the recovery effort. It has a dual structure in that its members include Team Leaders of other teams.

# Getting Started

## Veterans Portal (Beneficiary)

The following users will access the portal:

* Beneficiary (or Caregiver)

### Logging On

To access the BTSSS portal:

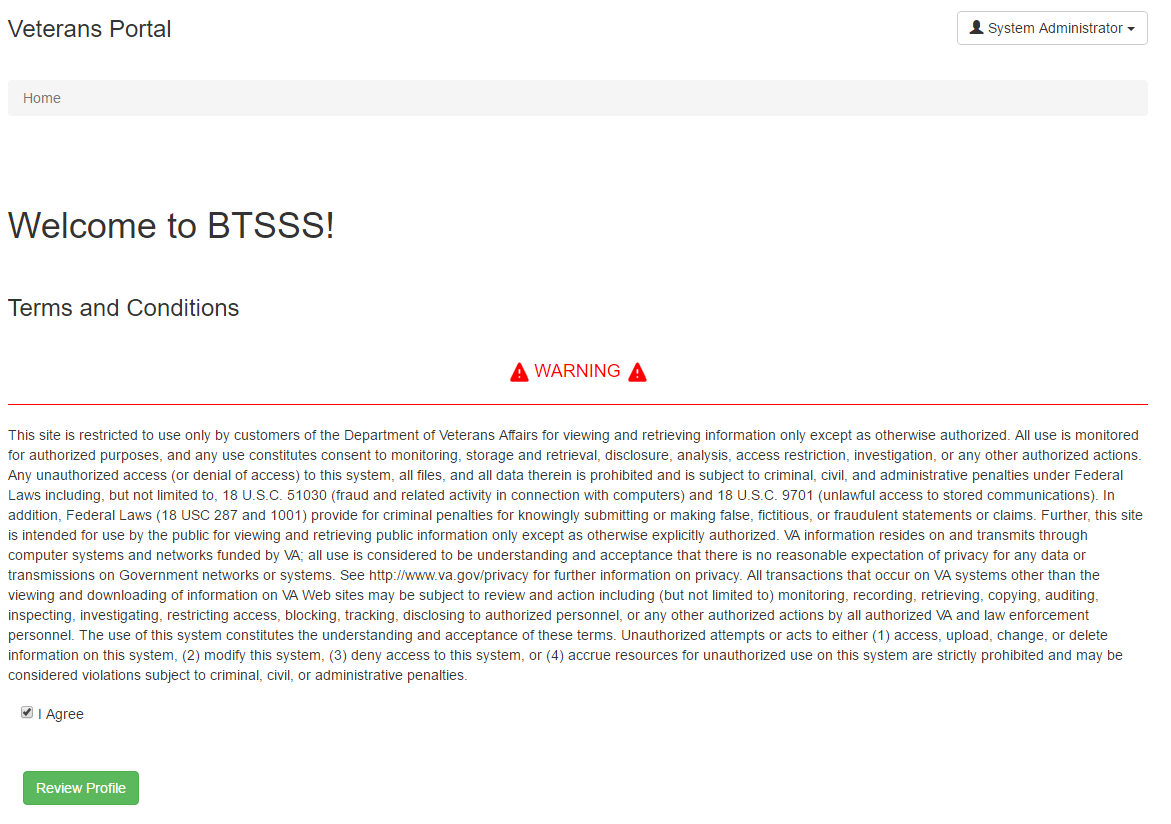
1. Go to <https://portal.libertybtdev.com/>
2. Click the Sign In button in the upper right corner. Note that in the future, users will be able to sign in using a third party, possibly via vets.gov using ID.me or SSOe.
3. Login using appropriate credentials

### System Menu

Prior to accessing the menu, the user must:

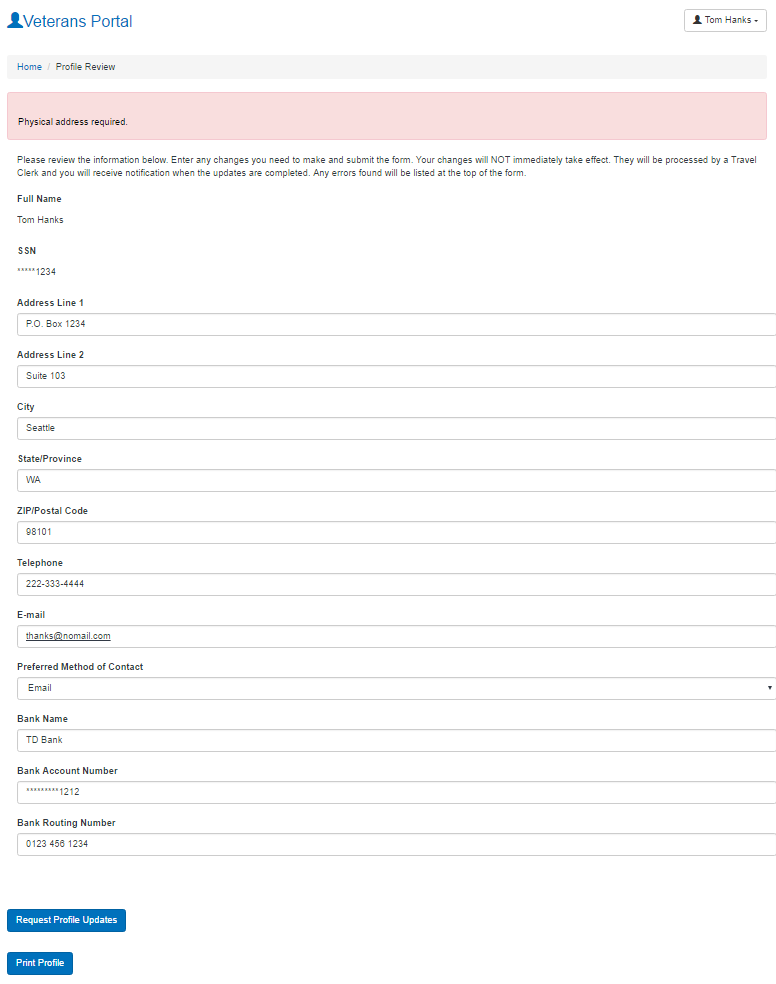
1. Check the **I Agree** checkbox to accept Terms and Conditions and click Review Profile.

Figure 3: BTSSS Welcome Screen



1. Confirm profile information (name, address, etc.).

Figure 4: Profile Review Page



The menu is then available to the user:

Figure 5: My Dashboard

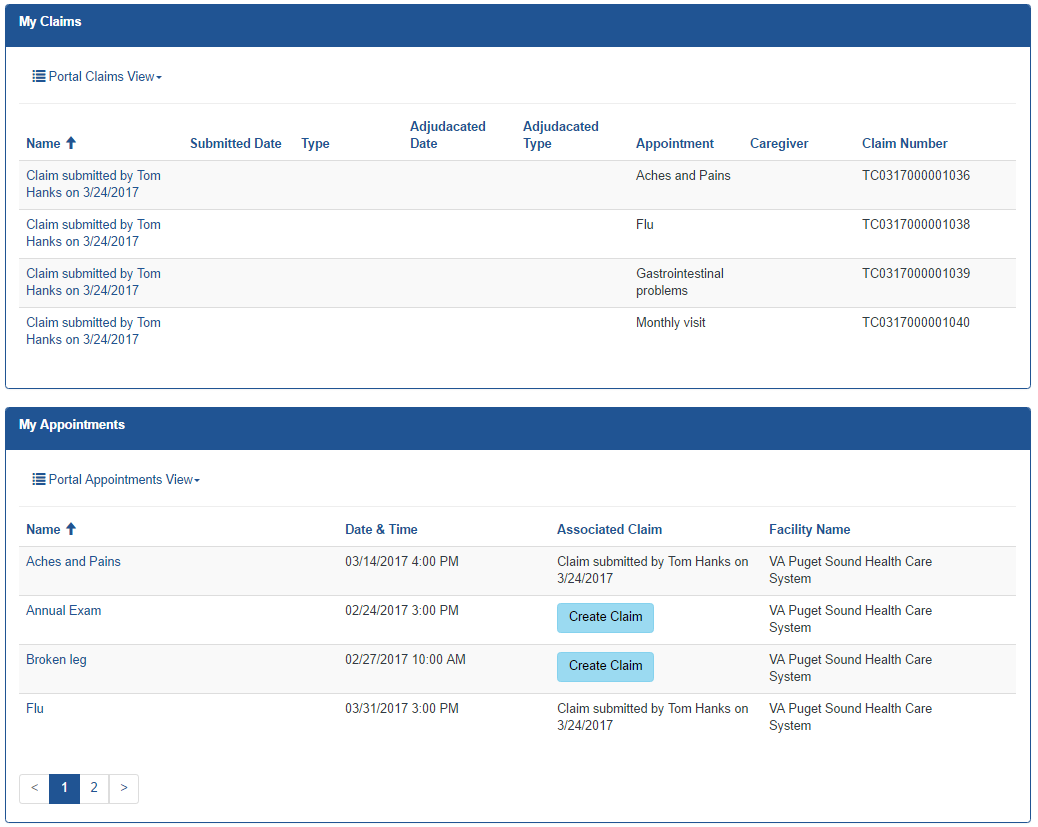
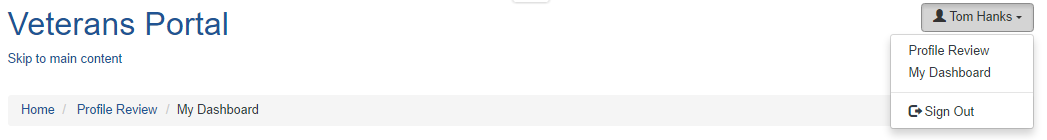


Figure 6: My Dashboard User Menu



### Changing User ID and Password

Users can change their username and password through the approved sign in system.

### Exit System

To exit the system, the user will click Sign Out.

### Caveats and Exceptions

All data must be accurate in the user’s profile. If any data needs to be updated, a request can be made via BTSSS; however, the data gets updated by a VA Travel Clerk. Alternatively, the user can update profile information via the appropriate source system.

## CRM (Administrative)

The following users will access CRM:

* Travel Clerk
* Application Super User
* Business User
* System Administrator

### Logging On

To access the BTSSS CRM:

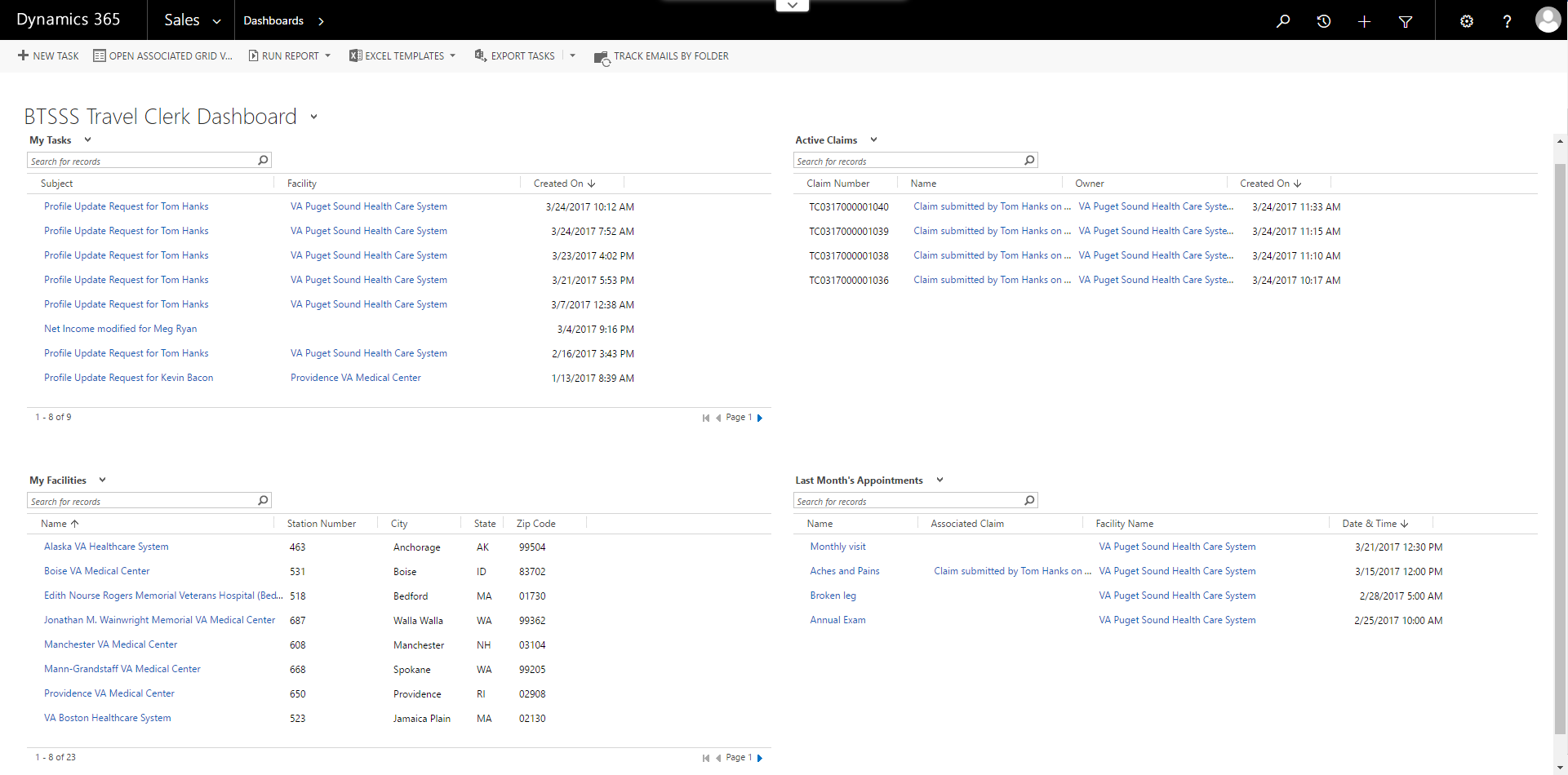
1. Go to <https://crm.libertybtdev.com/VA>
2. Login using appropriate credentials

### System Menu

Upon logging in, the user will see a dashboard. Each user role will have a specific dashboard. This dashboard is a default view but can be modified by the user. The dashboard will be the primary method for navigating around BTSSS.

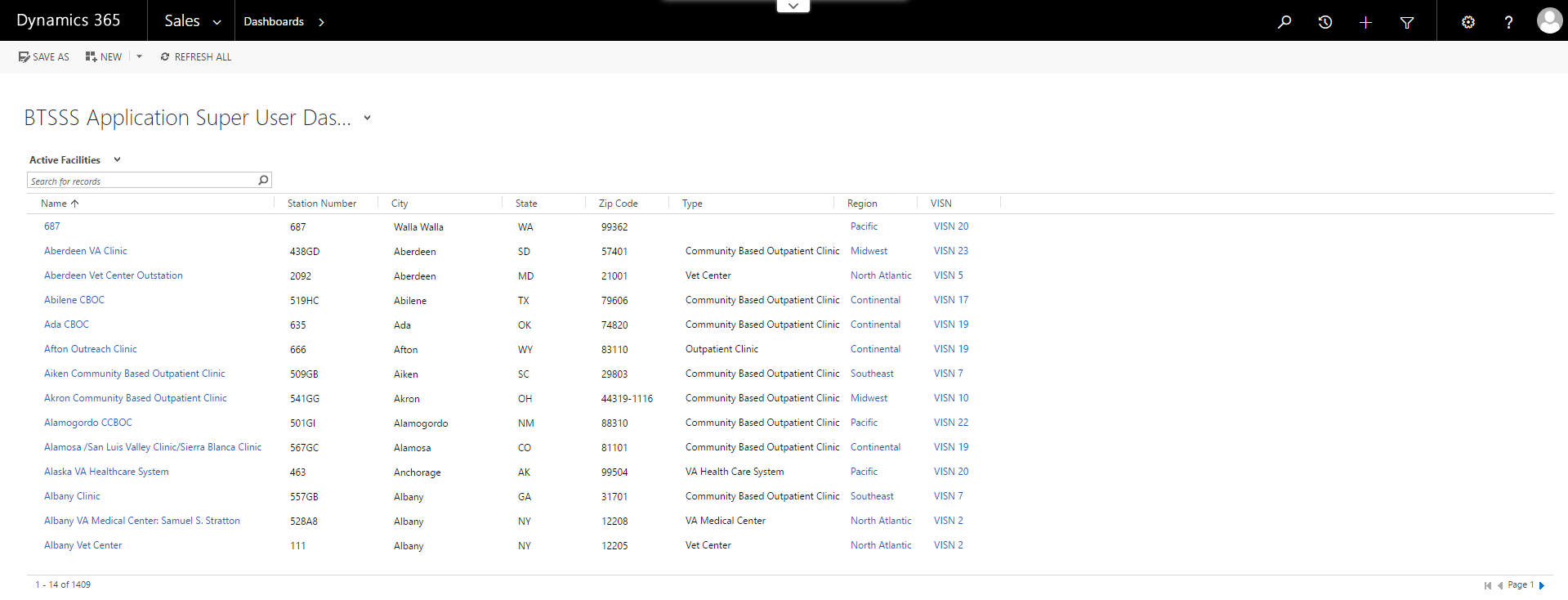
* Travel Clerk

Figure 7: Travel Clerk Dashboard



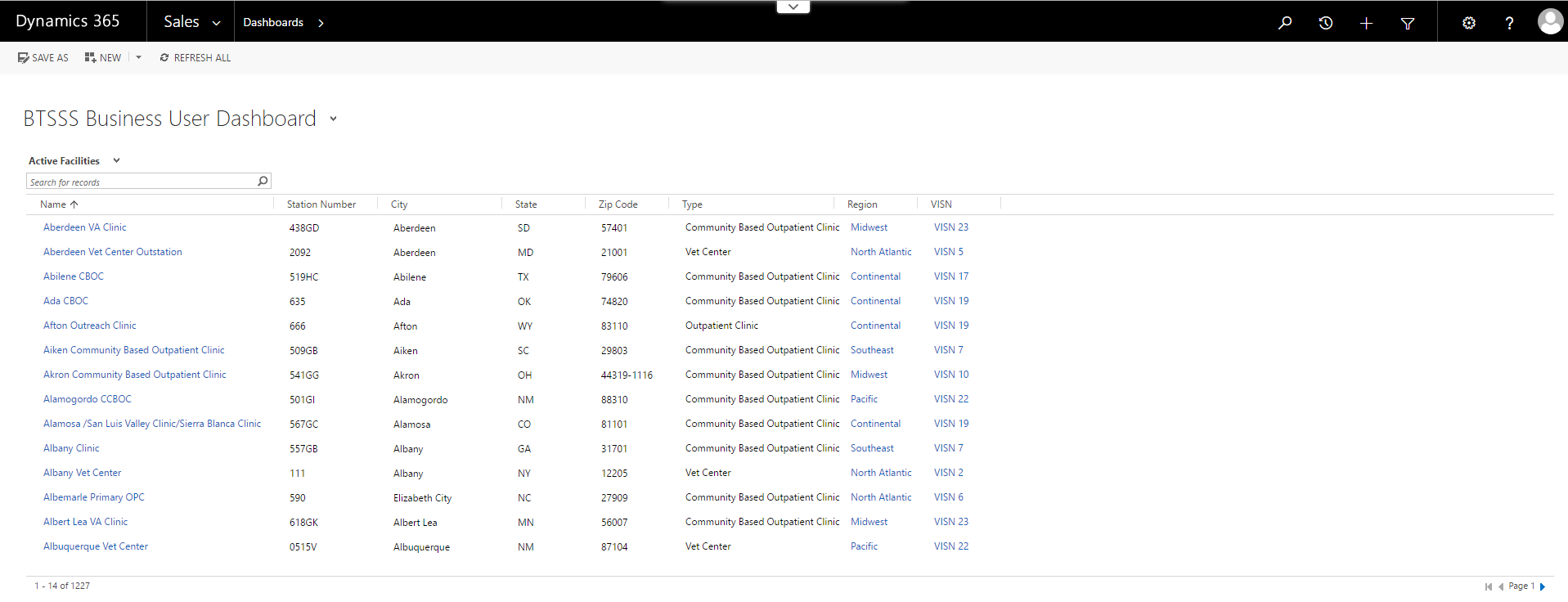
* Application Super User

Figure 8: Application Super User Dashboard



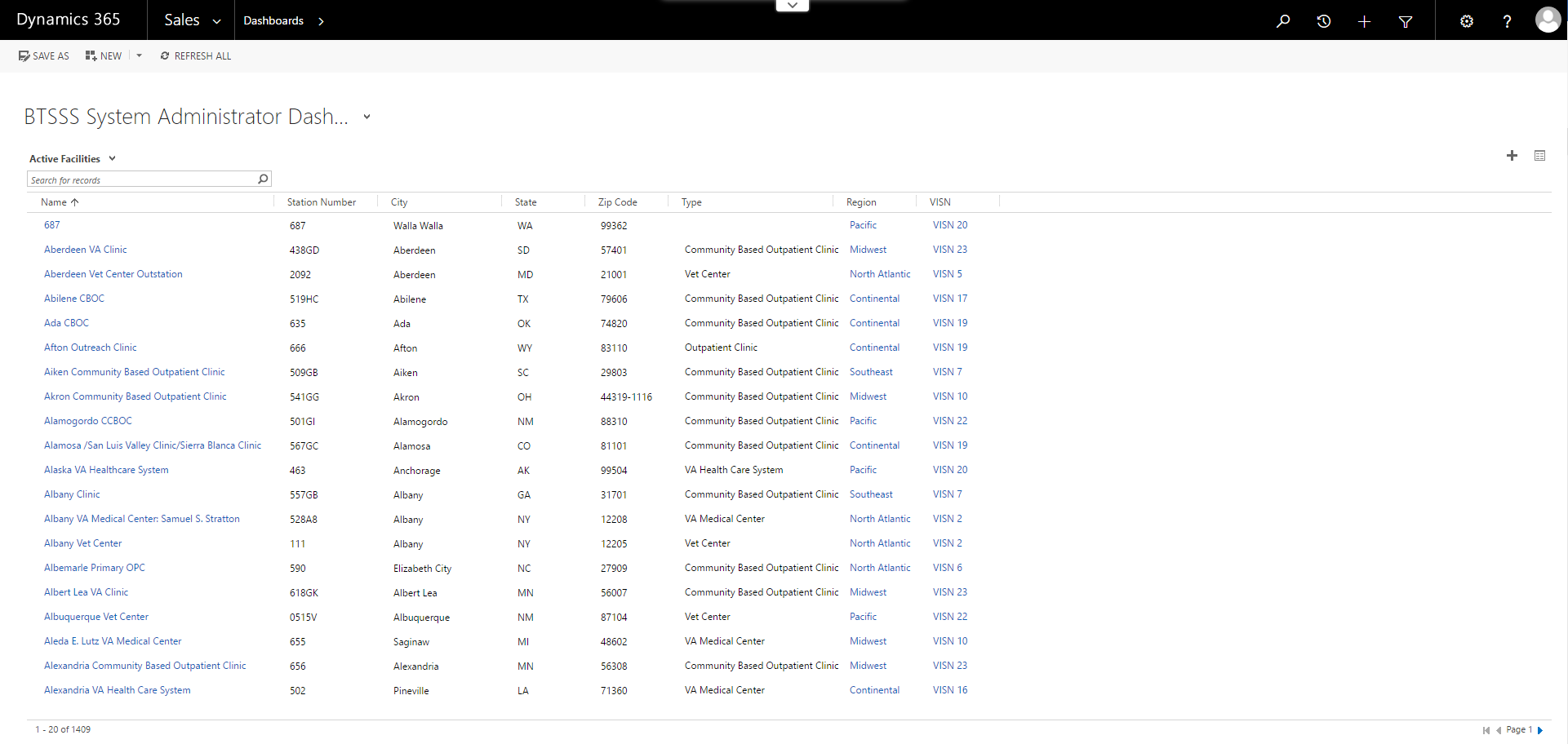
* Business User

Figure 9: Business User Dashboard



* System Administrator

Figure 10: System Administrator Dashboard



### Changing User ID and Password

### Exit System

### Caveats and Exceptions

# Using the Software

## Veterans Portal (Beneficiary)

* BT Claimants

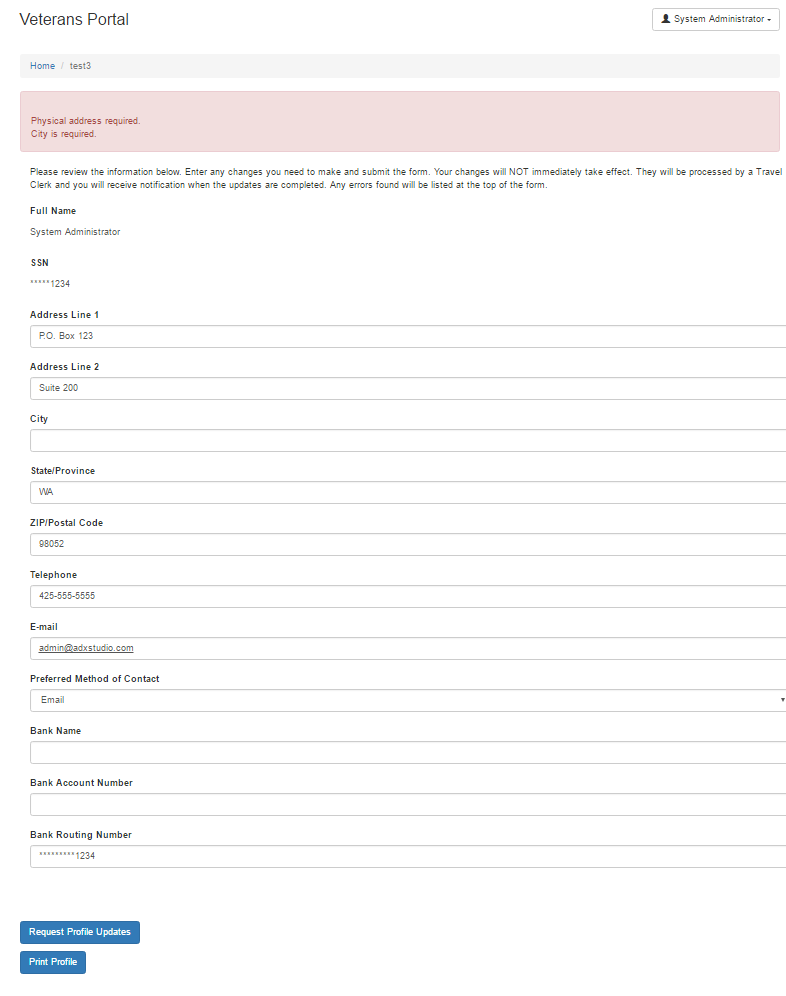
### Updating the Profile

Upon logging in, the user will be directed to review his/her profile information. The following fields are available to the user:

* Full Name (uneditable)
* SSN (uneditable, only last four digits visible)
* Address Line 1
* Address Line 2
* City
* State/Province
* ZIP/Postal
* Telephone
* E-mail
* Preferred Method of Contact
* Bank Name
* Bank Account Number
* Bank Routing Number (only last four digits visible)

If any of these fields do not contain data, the user will see the following screen:

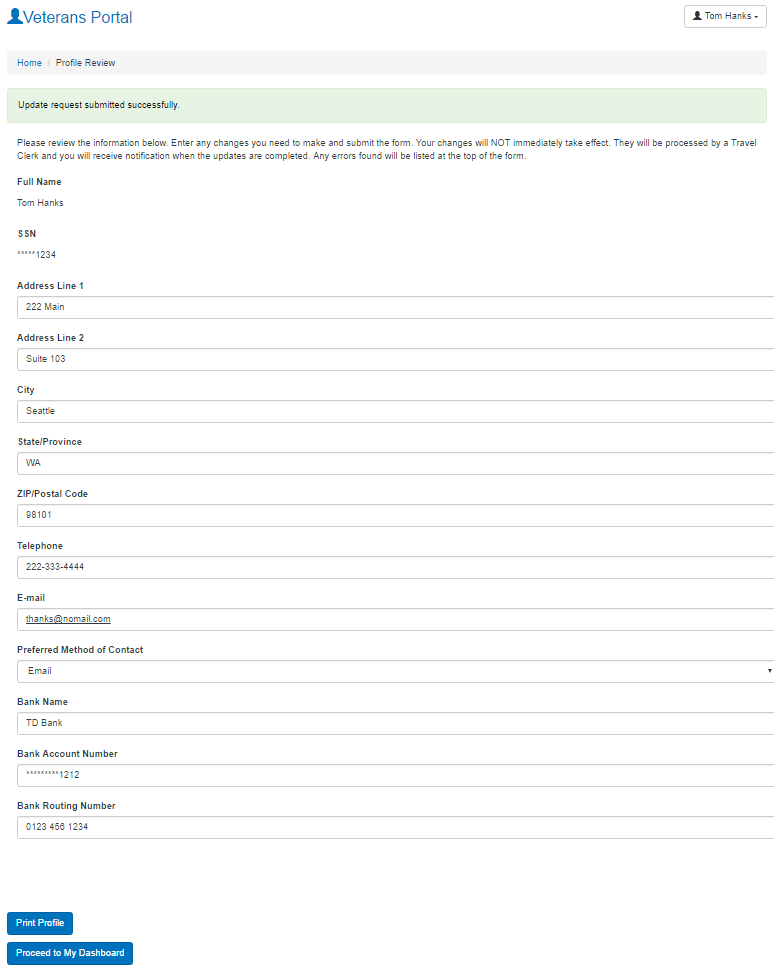
Figure 11: Update Profile



Highlighted in red will be the fields that require attention. The user should enter accurate data into all fields. Once all required data has been updated, the user can click **Request Profile Updates** to submit an update request. Note that the user cannot update the data live; a request must be submitted for an administrator to make the changes.

Once the request has been made, the user will see the following screen:

Figure 12: Accurate Profile Information



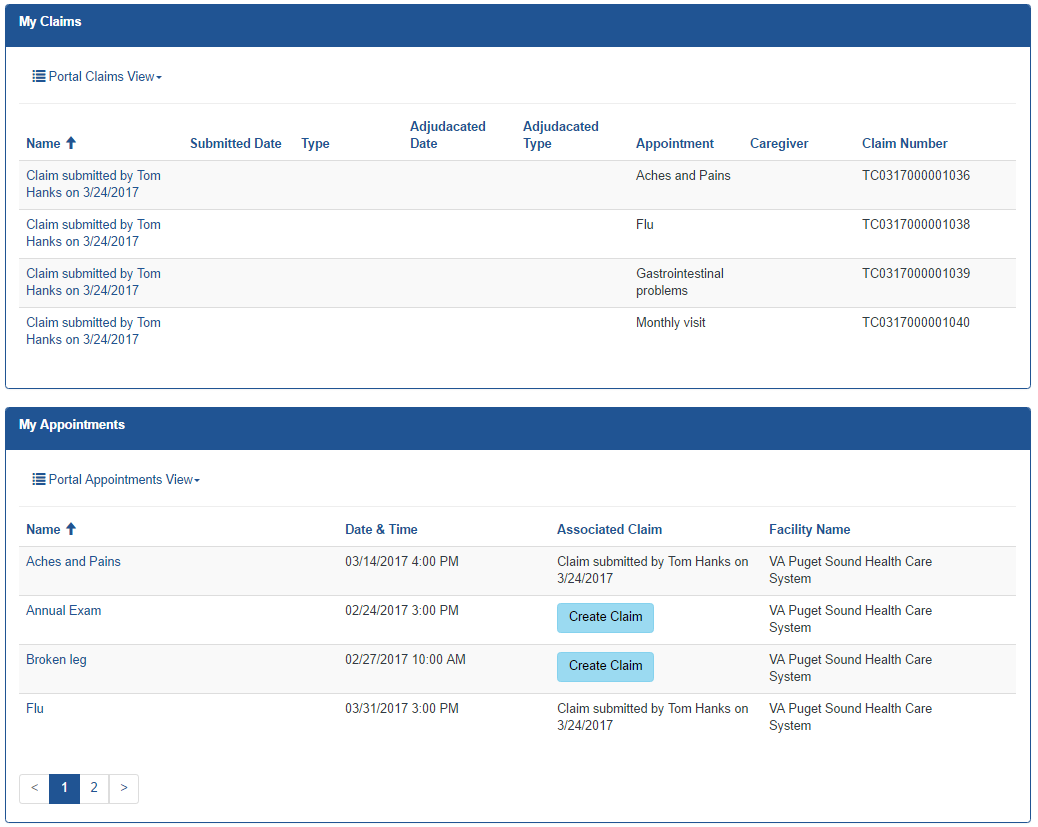
The user can now click **Proceed to My Dashboard** to enter the BTSSS module. The user can also click **Print Profile** to print the information in the profile. Note that, for security purposes, the following fields from the profile are not available for printing:

* SSN
* Bank Name
* Bank Account Number
* Bank Routing Number

### The Veterans Portal

Clicking **Proceed to My Dashboard** takes the user into the BTSSS portal. The portal provides the user with a list of current appointments and claims:

Figure 13: The BTSSS Veterans Portal – My Dashboard



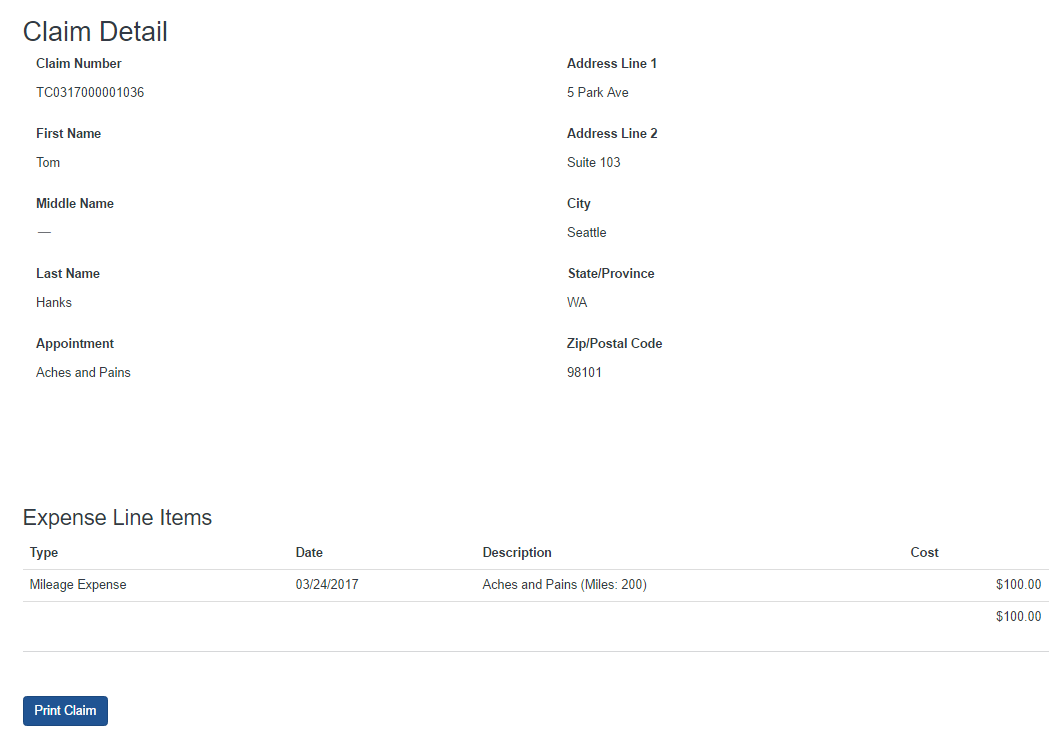
My Claims

The following data fields are available for each claim:

* Name
* Submitted Date
* Type
* Adjudicated Date
* Adjudicated Type
* Appointment
* Caregiver
* Claim Number

The user can sort the list of claims by clicking the field names. Clicking the claim name will display details about the claim and allow the user to enter data and submit the claim.

Figure 14: Claim Details



The following data fields are available for a claim:

* Claim Number
* First Name
* Middle Name
* Last Name
* Appointment
* Address Line 1
* Address Line 2
* City
* State/Province
* Zip/Postal Code
* Expense Line Items
  + Type
  + Date
  + Description
  + Cost

A claim can be printed by clicking the **Print Claim** button.

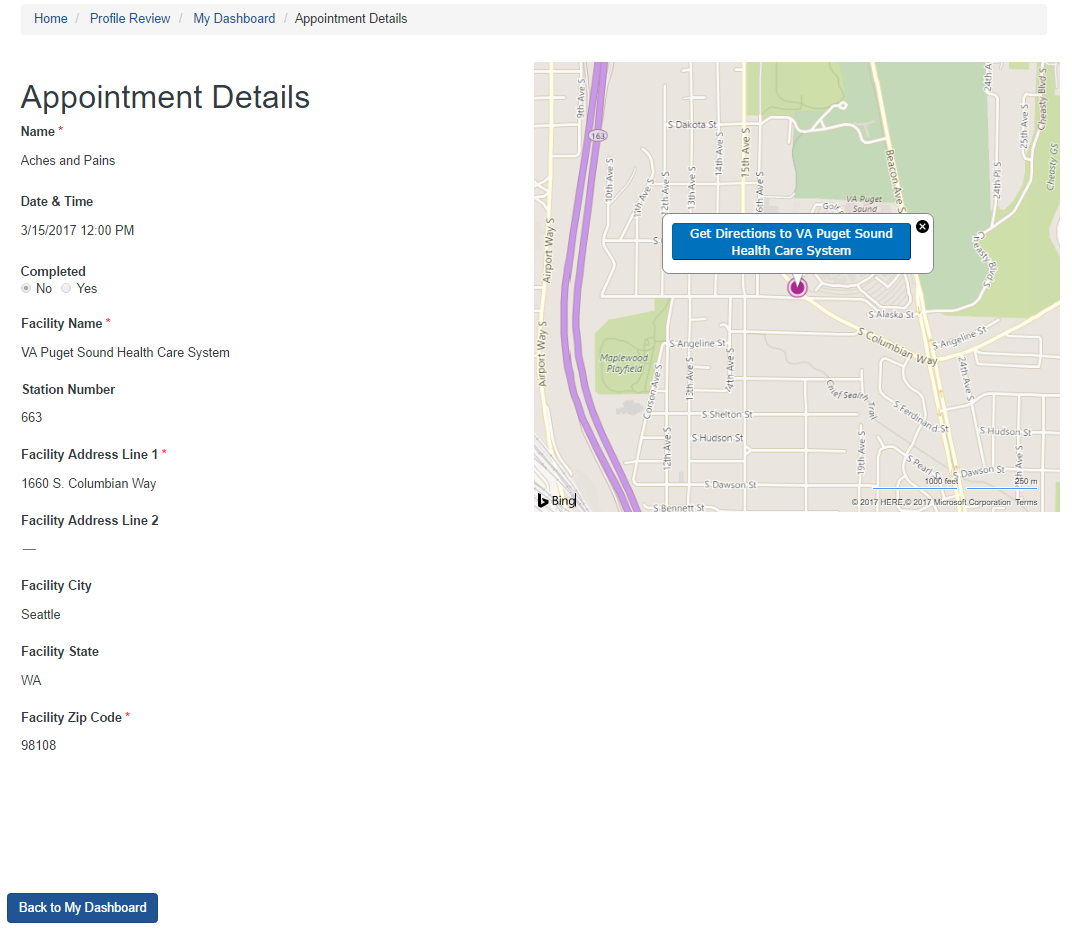
My Appointments

The following data fields are available for each appointment:

* Name
* Date & Time
* Associated Claim
* Facility Name

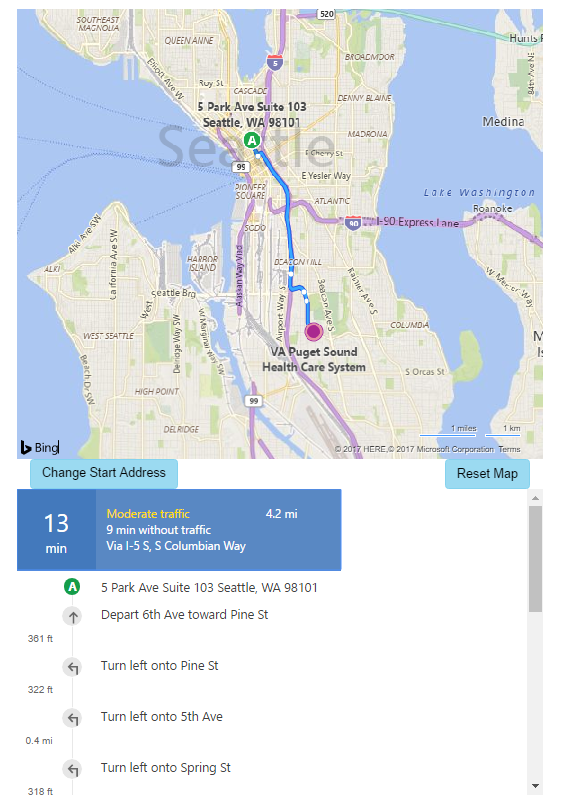
The user can sort the list of appointments by clicking the field names, or filter the appointments by date using the Portal Appointments View dropdown box. Clicking the appointment name will display details about the appointment as well as a map showing the appointment location.

Figure 15: Appointment Details



The claimant can display directions from his/her home address to the facility by clicking the **Get Directions** link on the Bing map. This will display directions according to the default addresses, but also allow the user to go to Bing maps directly if different addresses are required.

Figure 16: Directions to Facility



Creating a New Claim

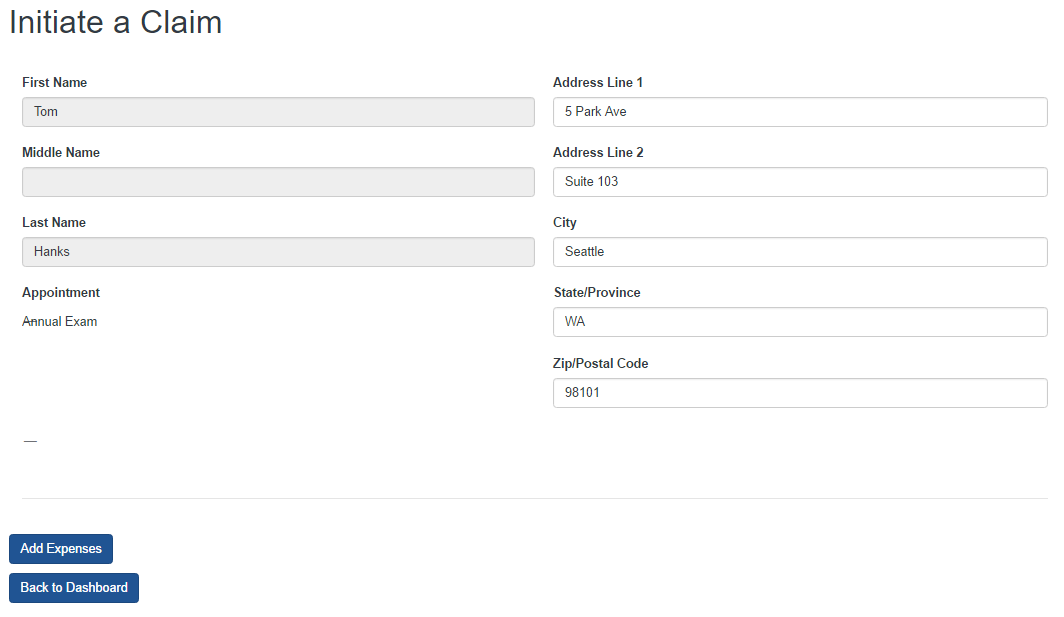
There are two ways for a claimant to initiate a claim:

1. Clicking **New Claim** for a specific appointment - this will generate a new claim linked to that appointment.
2. Clicking **New Claim** in the My Claims section - this will generate a new claim that will prompt the claimant to select an appropriate appointment (**this feature coming soon).**

Creating a New Claim via Appointment

To create a new claim associated with a specific appointment, click **Create Claim** for an appointment. This will direct the claimant to the Initiate a Claim screen:

Figure 17: Initiate a Claim



The claimant’s name and appointment will already be filled in, as well as the claimant’s address. Note that a PO Box will generate an error message. To add expenses for this claim, click **Add Expenses.** The claimant will be prompted to select an expense type from the following list:

* Mileage
* Air Travel
* Lodging
* Meal
* Public Transport
* Toll
* Other

Figure 18: Choose an Expense Type

Figure showing how to choose an expense type.
cid:image003.png@01D282B2.B4C5B0D0

1. Mileage Expense (currently the only valid expense type; others coming soon)
   1. Fill in the date the expense was incurred and a description.
   2. Enter the From Address and the To Address for the trip. Note that a PO Box is invalid and will generate an error message.
   3. Enter the Trip Type (one way or round trip), the Cost, and the Mileage.
   4. Click **Add Expense** to save this expense.
   5. Too add another expense, select the type from the dropdown and click **Add Expense.**

Figure 19: Mileage Expense

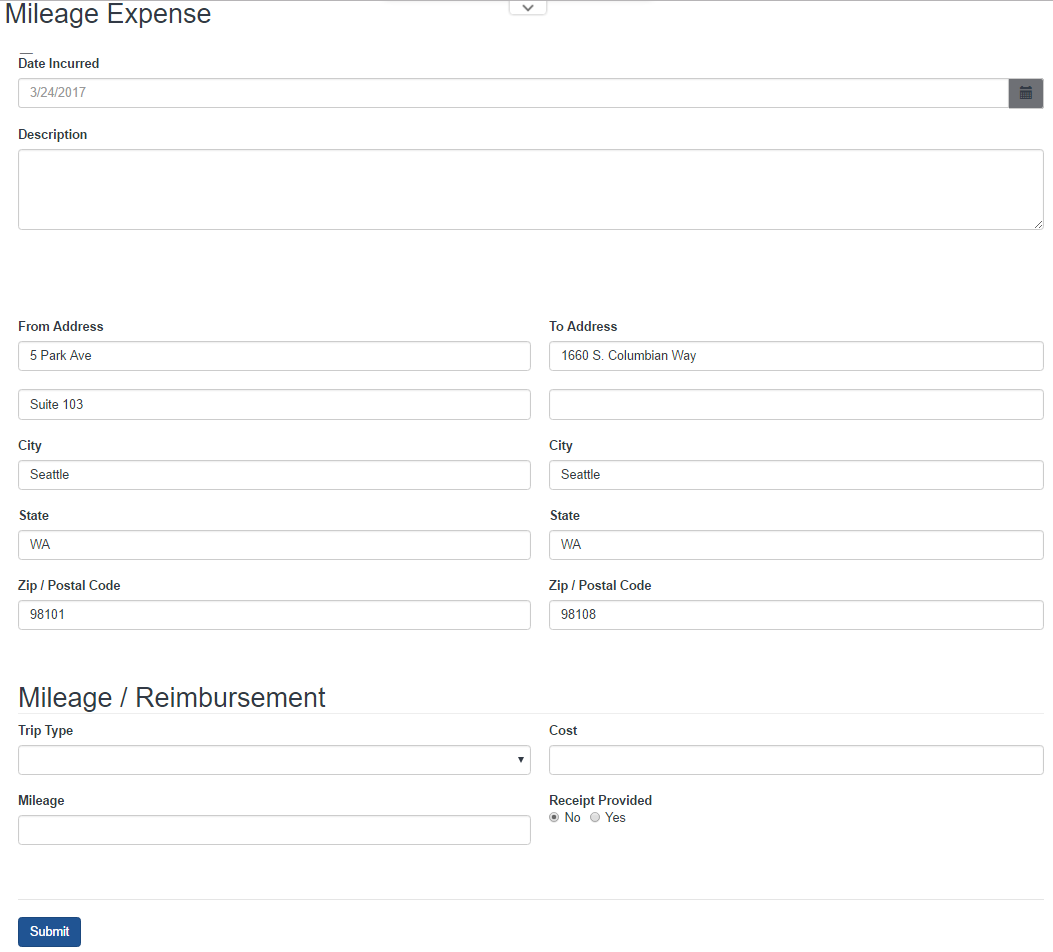


Figure 20: Expense Complete



1. Air Travel Expense
2. Lodging Expense
3. Meal Expense
4. Other Expense
5. Public Transport Expense
6. Toll Expense

Once the expense has been entered, check the I Agree checkbox and click **Submit Claim**. There will be two updated records on My Dashboard: the new claim will appear under My Claims, and appointment will have an Associated Claim under My Appointments:

Figure 21: New Claim



Figure 22: Updated Appointment



## CRM (Administrative)

There are four different user roles that will access CRM; each role will have a unique set of functionality available to it. Those roles are:

* Travel Clerk
* Business User
* Application Super User
* System Administrator

### Travel Clerk

The Travel Clerk represents the person(s) responsible for assisting the BT Claimant with issues with their claim.

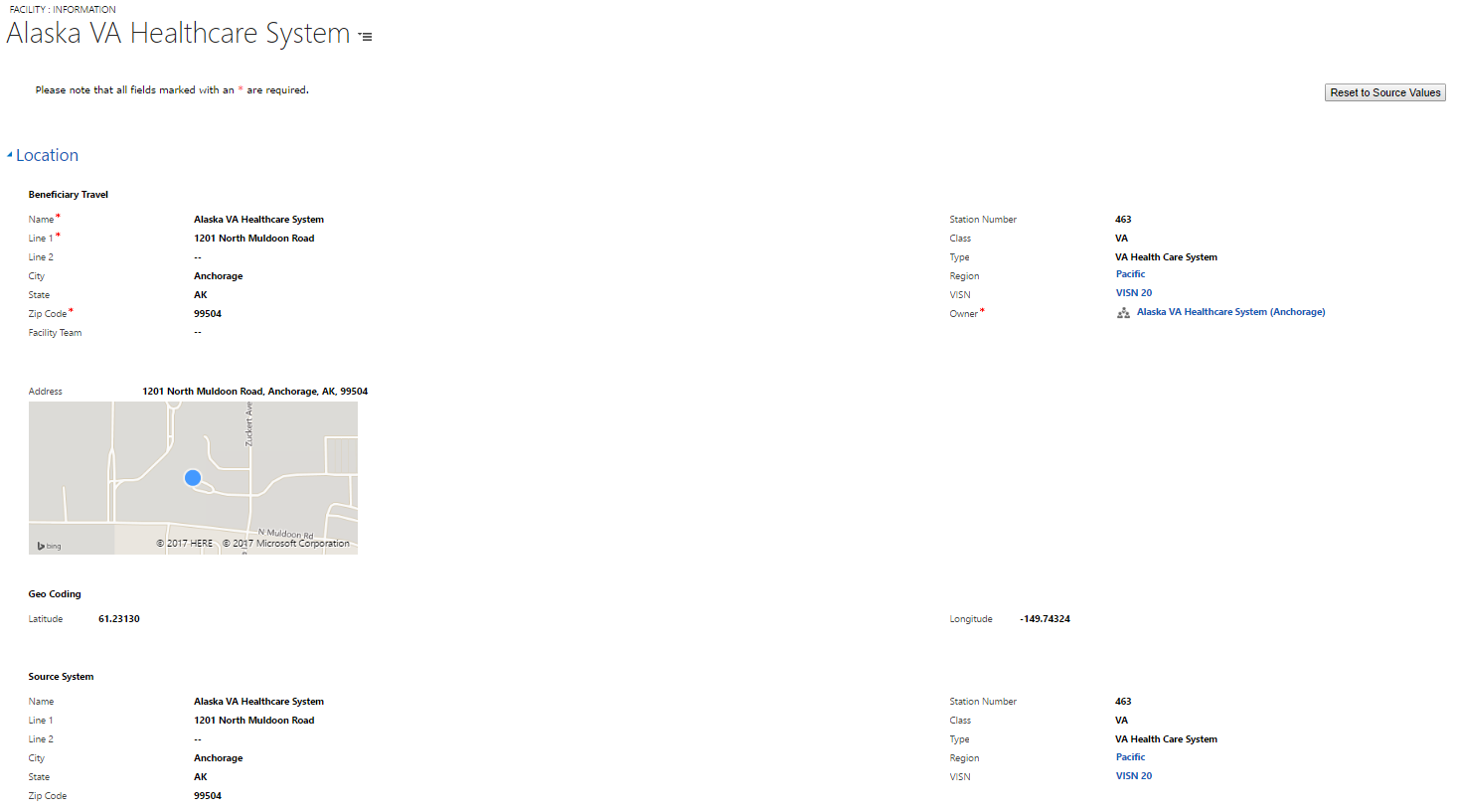
The Travel Clerk has the ability to:

1. Modify facility addresses
2. View beneficiary appointments
3. Create a claim for a beneficiary
4. Process a claim for a beneficiary
5. Complete beneficiary profile change request tasks

Modify Facility Addresses

To modify the address or other data for a VA facility, the user must click the facility to update from the Travel Clerk dashboard. This will direct the user to the selected facility’s data:

Figure 24: Facility Data



The facility data screen has three sections:

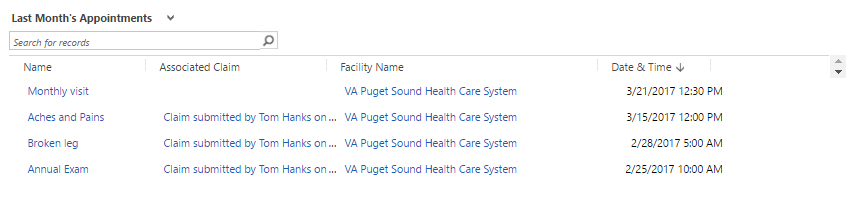
1. The Beneficiary Travel section provides the name and address for the facility, and also includes a map and additional data such as the station number, class, and type of facility. This data is editable by the Travel Clerk.
2. The Geo Coding section provides the longitude and latitude of the facility.
3. The Source System section provides the data for the facility from the source system of record.

The Travel Clerk can edit any of the BT section data. If the Travel Clerk makes a mistake, he/she can reload that data from the Source System section by clicking **Reset to Source Values.**

View Last Month’s Beneficiary Appointments

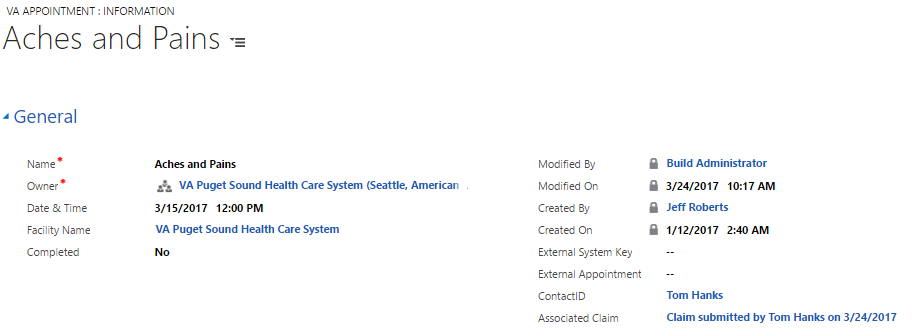
To view last month’s appointments, navigate to the Last Month’s Appointments section of the dashboard:

Figure 25: Last Month’s Appointments



To view a specific appointment, click on the appointment:

Figure 26: Appointment Details



Create a claim for a beneficiary

To create a claim for a beneficiary, the Travel Clerk can:

1. Click the PLUS icon in the Active Claims section of the dashboard (coming soon).
2. Navigate to the contact record for the user (coming soon).
3. Navigate to the appointment (coming soon).

To create a claim from the dashboard:

1. Click the PLUS icon.
2. Complete the form and click the Save and Refresh button.

Figure 27: Create a Claim from Dashboard

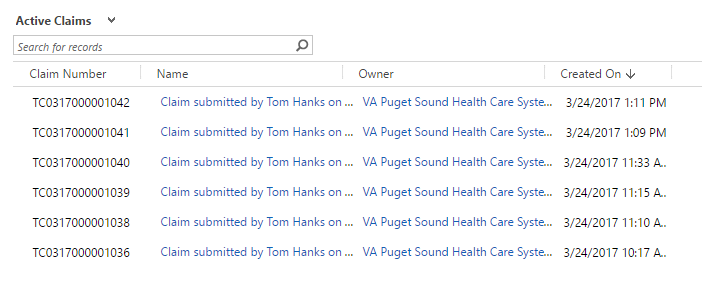
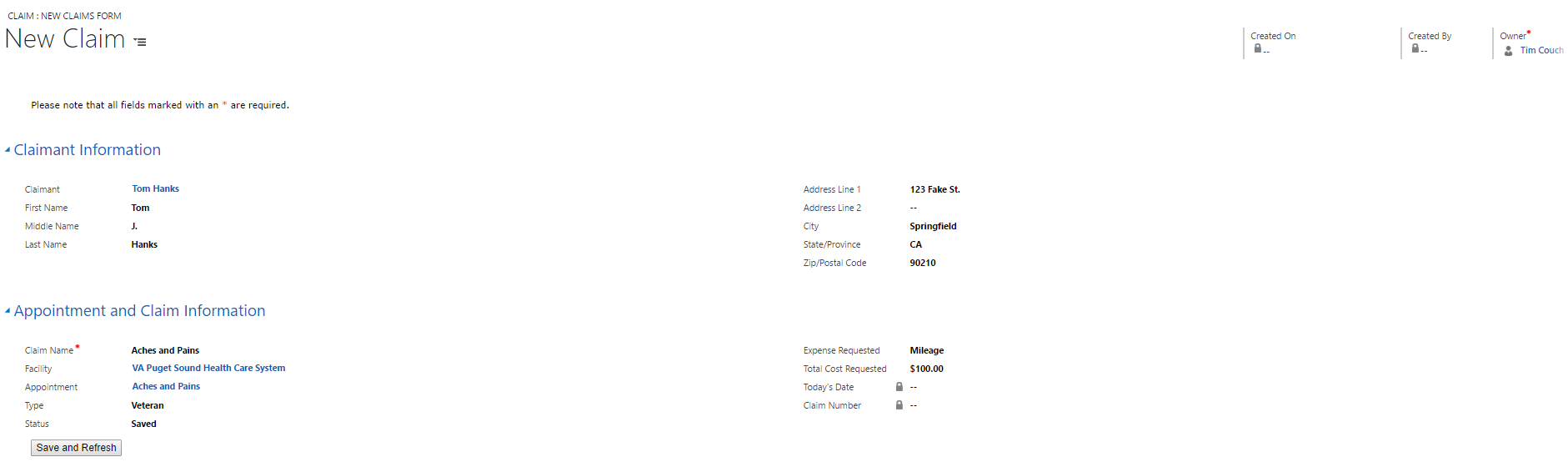
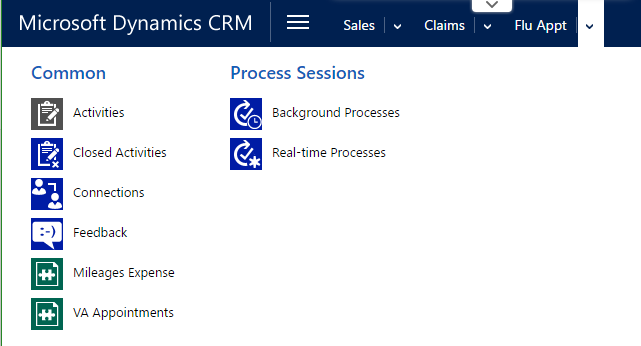


Figure 28: New Claim Form



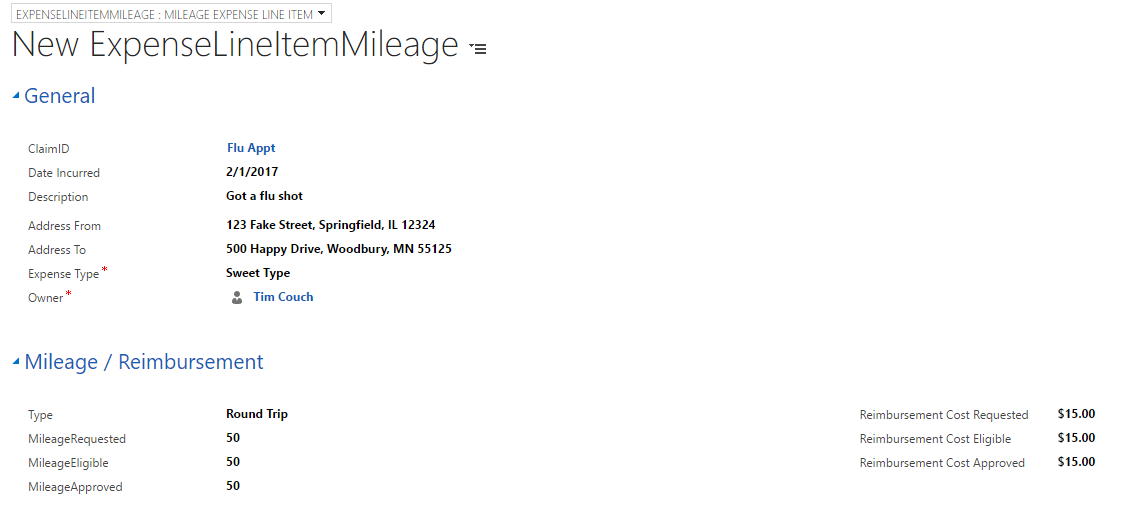
1. To add an expense for the claim, click the down arrow next to the new claim at the top and click Mileages Expense:

Figure 29: Add Expense



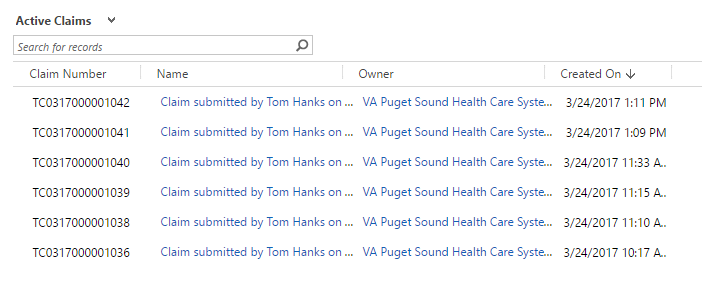
Complete the form and click **Save and Close**.

Figure 30: New Mileage Expense



The new claim appears in the Active Claims dashboard:

Figure 31: Active Claims



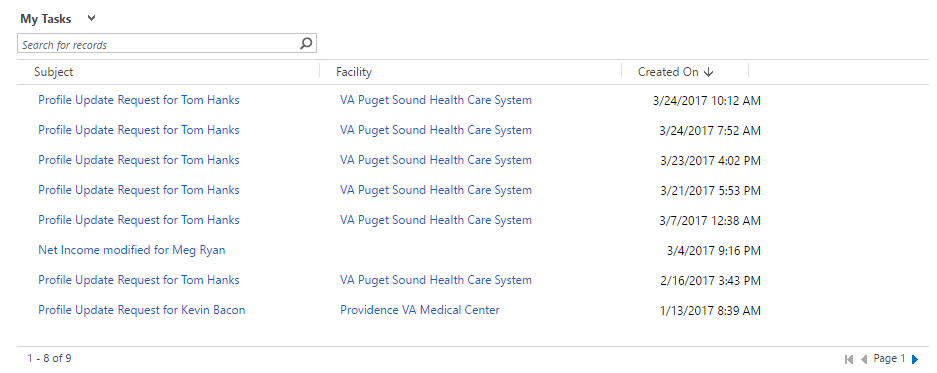
Process a claim for a beneficiary

TBD

View beneficiary profile data requested changes

To view any requested profile changes for the Travel Clerk’s facility, the user can view the task list for profile update requests in the Travel Clerk dashboard:

Figure 32: Profile Update Requests (My Tasks)



To view a request, click it.

Figure 33: Profile Update Request Record



Each requested change is displayed in the profile update request, with the name of the field, the original value (can be blank), and the new requested value. Note that the Travel Clerk cannot make the changes in BTSSS.

### Business User

The Business User represents the person who utilizes the BTSSS data for business intelligence and reporting analysis.

### Application Super User

The Application Super User represents the person who is engaged in report design/customization, workflow design/modification, and parameters configuration setup/modification.

The Application Super User has the ability to:

1. Create a new facility record.

Create a new facility record

To create a new facility, the user must navigate to Menu -> Service -> Extensions -> Facilities and click on **New** button in the upper left corner.

Figure 34: Active Facilities

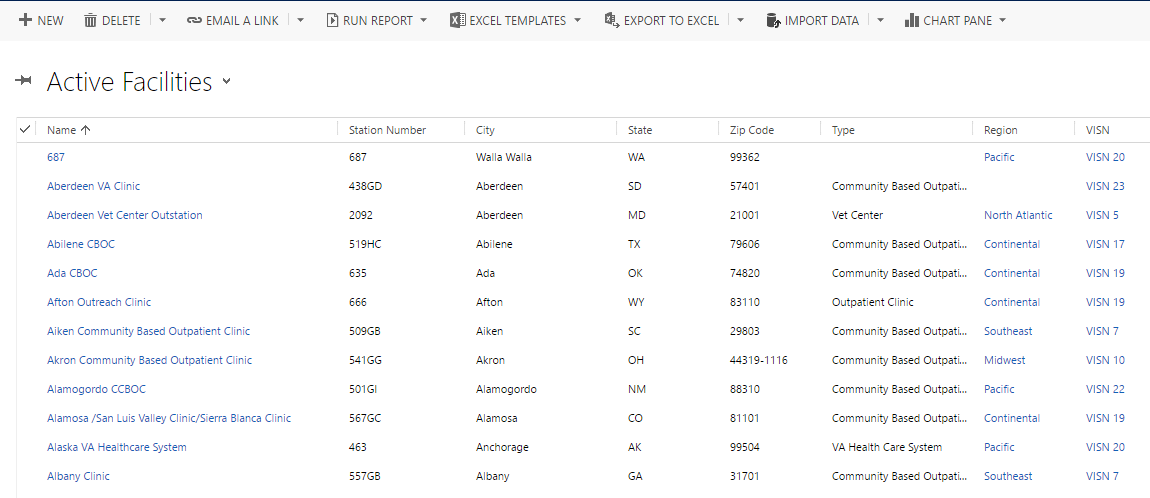
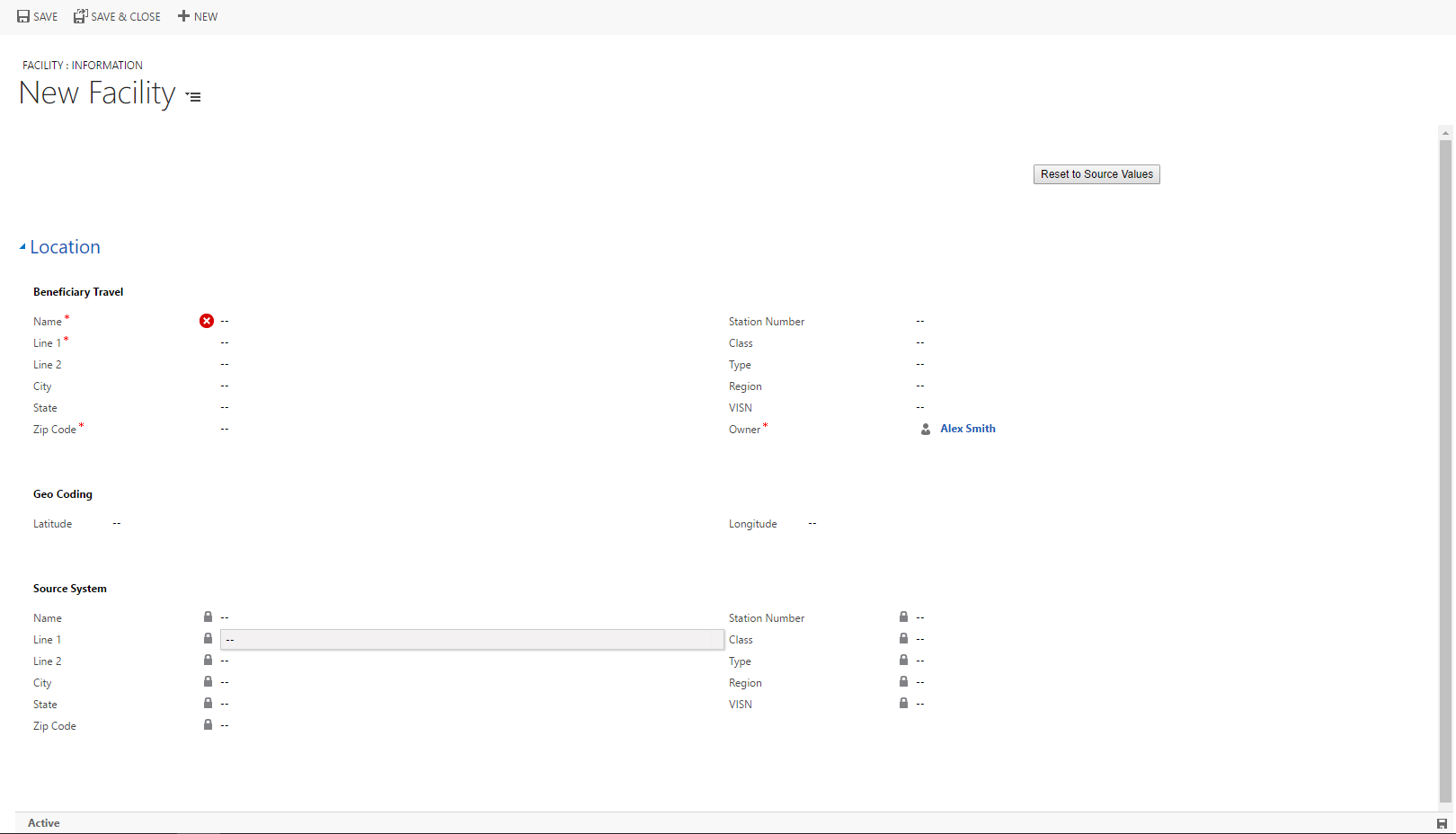


Figure 35: New Facility



Fill out the information in the New Facility form and save by clicking the icon in the lower right or the button in the upper left. The new facility will then appear in the Active Facilities list.

Add a team to a facility

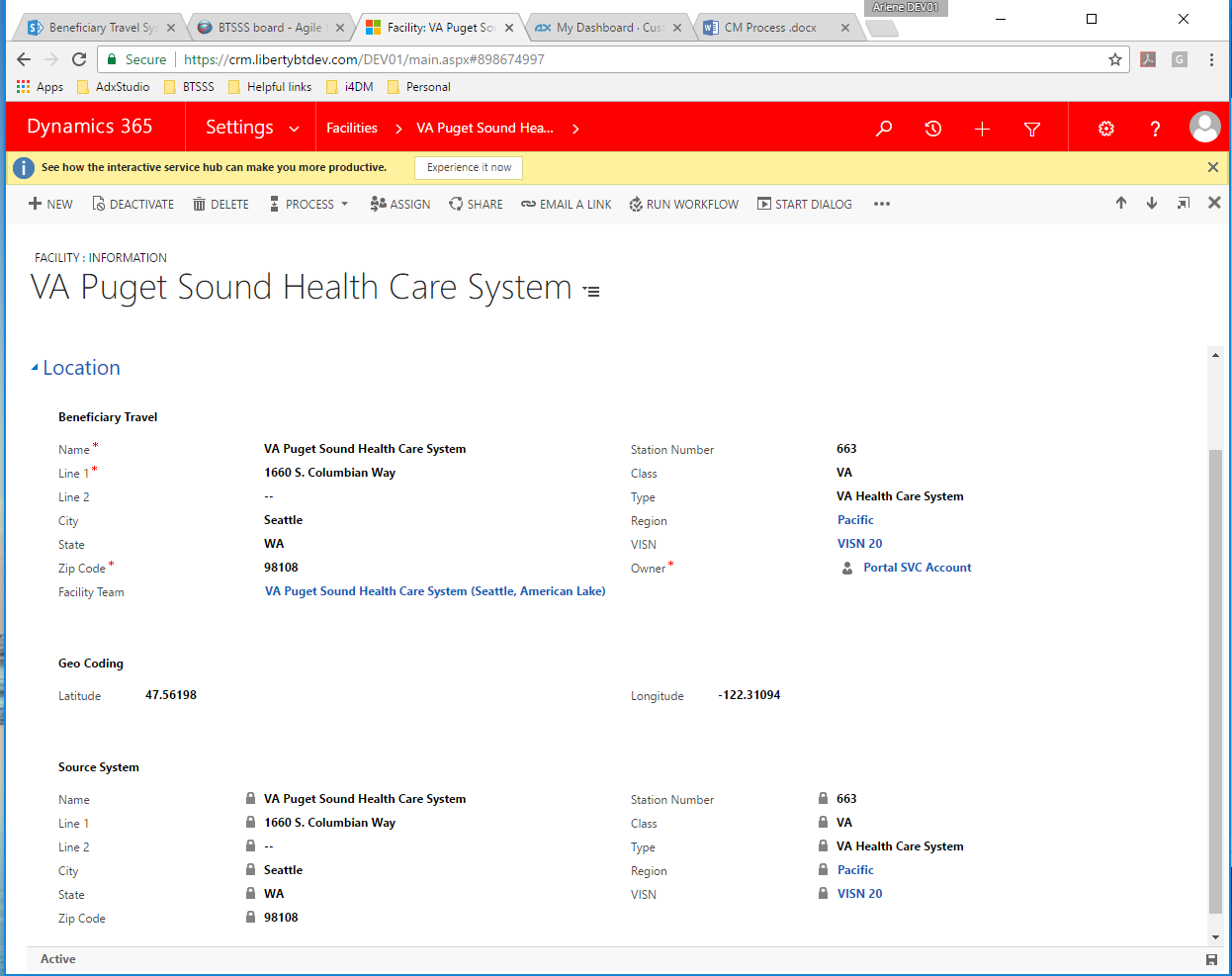
A team is a group of users at a facility. An Application Super User can assign a team to a facility in CRM. Go to Menu -> Settings -> Extensions -> Facilities:

Figure 36: Facilities



Select the desired facility from the list. In the Facility Team field, search for and select the correct team. Once selected, click the save icon.

Figure 37: Update Facility Team



### System Administrator

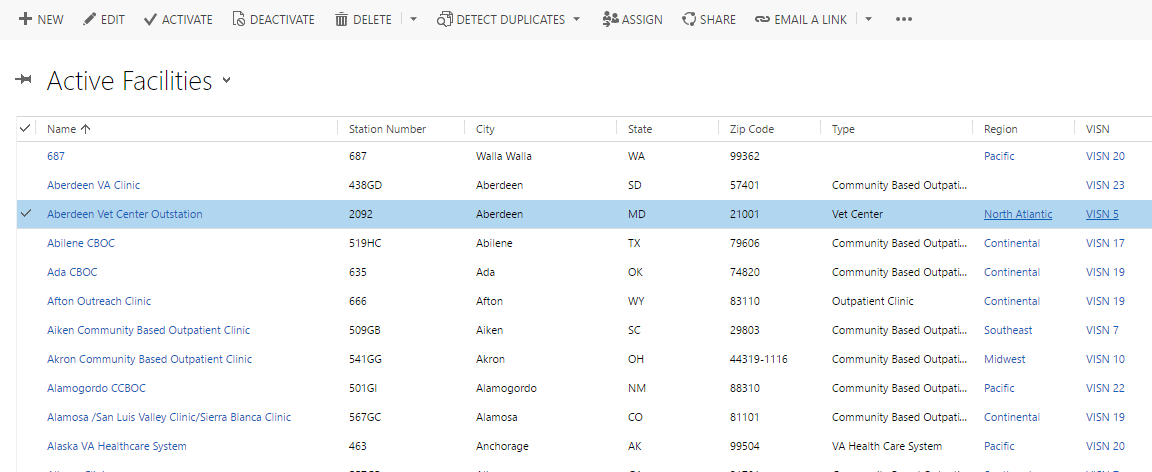
The System Administrator represents the person who has full control on the system.

1. Delete a facility record.
2. Configure System Level Rules.
3. Configure Facility Level Rules.
4. Add a team to a facility.

Delete a facility record

To delete an existing facility record, navigate to Menu -> Service -> Extensions -> Facilities. In the list of Active Facilities, check the row of the facility to delete and click the Delete button at the top.

Figure 38: Delete a Facility



Configure System Level Rules

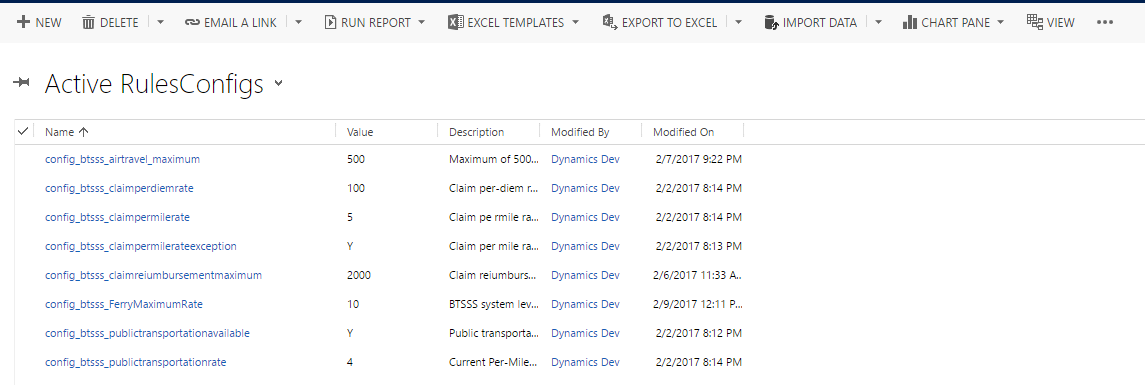
A System Administrator has the ability to set specific rules system-wide, such as setting a limit on bus fare or mileage. These rules can be overridden at the facility level. To create a new rule, go to Menu -> Settings -> Extensions -> RulesConfigs:

Figure 39: RulesConfigs



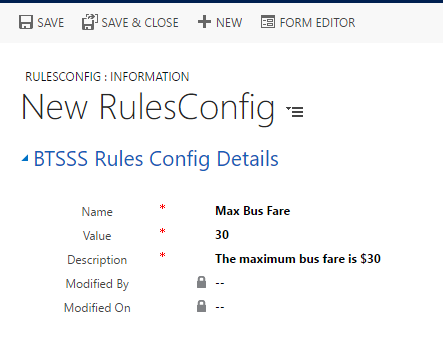
All current rules are listed under Active RulesConfigs:

Figure 40: Active RulesConfigs List



To create a new rule, click the **New** button in the upper left corner. In the New RulesConfig screen, enter the Name, Value, and Description of the new rule and click **Save:**

Figure 41: New RulesConfig



The new rule will appear in the Active RulesConfigs list.

Configure Facility Level Rules

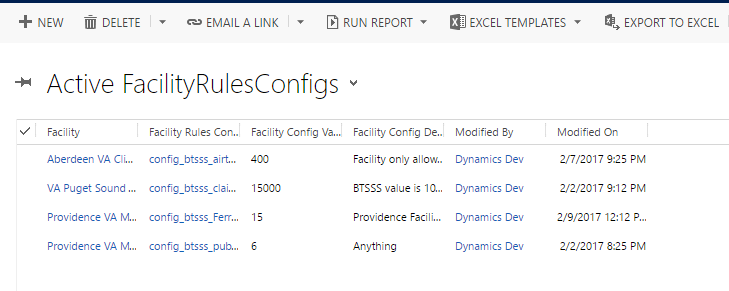
A System Administrator can also configure rules specifically for facilities that will override system-wide rules. To create a new rule, go to Menu -> Settings -> Extensions -> RulesConfigs:

Figure 42: FacilityRulesConfigs



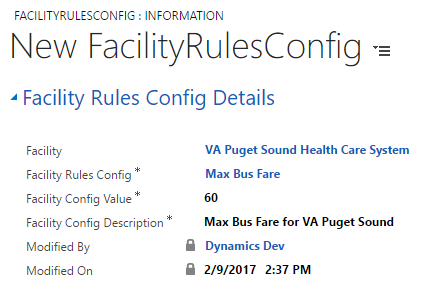
All current rules are listed under Active FacilityRulesConfigs:

Figure 43: Active FacilityRulesConfigs



To create a new rule, click the **New** button in the upper left corner. In the New FacilityRulesConfig screen, enter the Facility, select the appropriate system-wide rule, and enter a Value and Description of the new rule and click **Save:**

Figure 44: New FacilityRulesConfig



Add a team to a facility

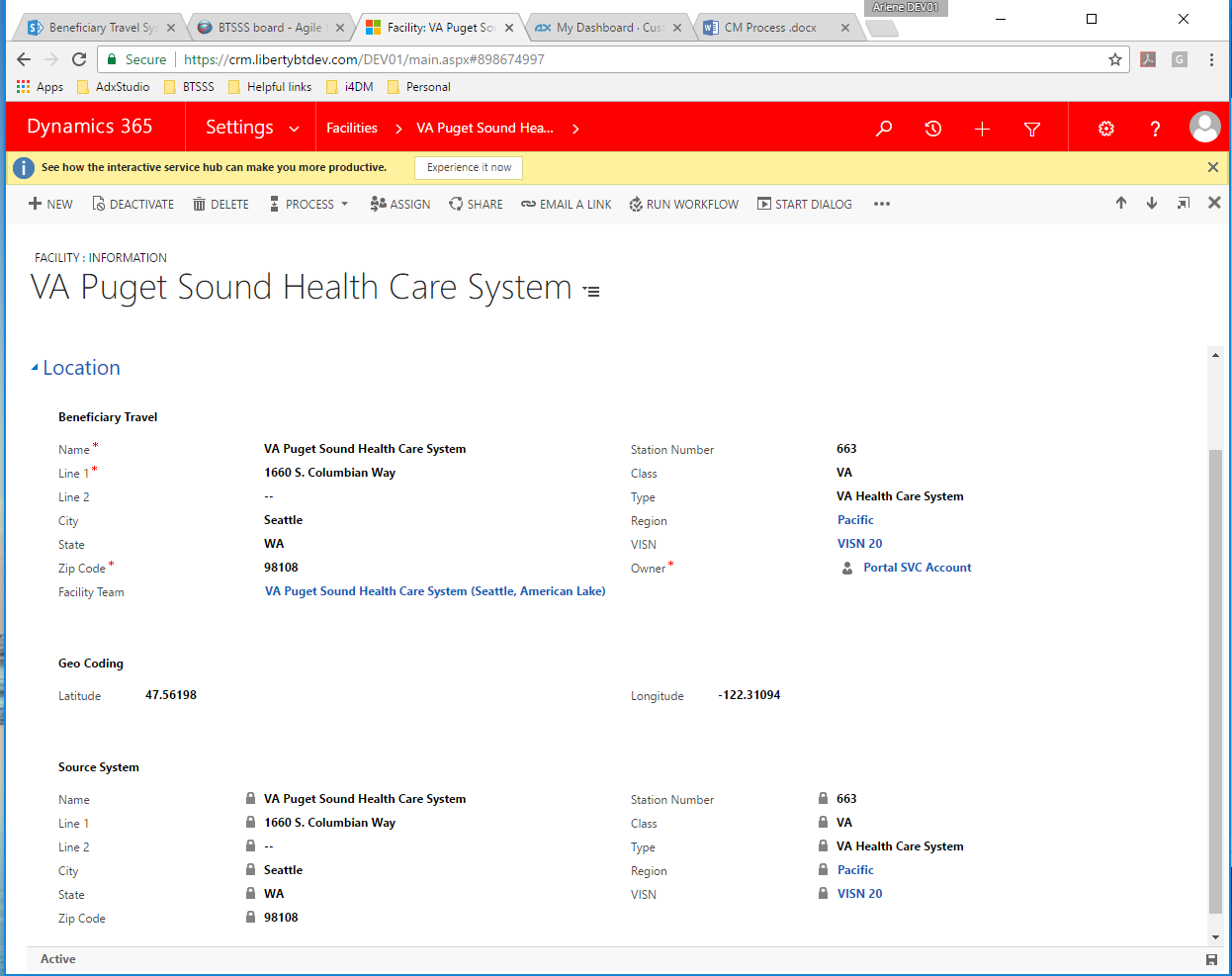
A team is a group of users at a facility. A System Administrator can assign a team to a facility in CRM. Go to Menu -> Settings -> Extensions -> Facilities:

Figure 45: Facilities



Select the desired facility from the list. In the Facility Team field, search for and select the correct team. Once selected, click the save icon.

Figure 46: Update Facility Team



# Troubleshooting

There are no known problems anticipated or otherwise. For assistance with problems with the system the user should follow existing procedures for help.

## Special Instructions for Error Correction

There are no special instructions for Error Correction associated with the new reports implemented in the Fee Payment Processing System (FPPS).

# Acronyms and Abbreviations

Table 3: Acronyms and Abbreviations

| Term | Definition |
| --- | --- |
| BN | Business Need |
| BT | Beneficiary Travel |
| BTSSS | Beneficiary Travel Self-Service System |
| COTS | Commercial Off-the-Shelf |
| CRM | Customer Relationship Management |
| EFT | Electronic Funds Transfer |
| FMS | Financial Management System |
| FPPS | Fee Payment Processing System |
| FY | Fiscal Year |
| IT | Information Technology |
| OI&T | Office of Information and Technology |
| OIG | Office of Inspector General |
| QA | Quality Assurance |
| RSD | Requirements Specification Document |
| VA | The Department of Veterans Affairs |
| VHA | Veterans Health Administration |
| VPS | Veteran Point of Service |

# Appendix

Not Applicable.

# Index

Not Applicable.