VE SERVICES

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# Project Overview

VES is a Veteran owned service company. They help the veterans in VA (Veteran Affairs) disability claims process. In order to effectively process the claims, they need the medical records from VBMS website (This website is an internal website on VA Server, and cannot be accessed from outside the network)

Currently operators have to manually download these records from VA server and maintain it in EMS application to process the claims. The purpose of this project is to automate the process of downloading the files(pdfs) from VA Server to VES Server and merge the PDFs into single PDF file.

# Current process

EMS application is used for maintaining the medical records of veterans inside the VES network.

Each Operator logs into VES system and VA server using smart card and a pin.

## EMS Application:

1. From Operator’s laptop, open EMS application
2. Apply the filters for Exam Date and Status (Pending)
3. Open the latest result, and assign it to operator so that no one else will work on the case
4. Search for the File # in Archive Folder and Images Folder on the shared drive. If the file exists then Operator have to pull patient records from vbms site after the last processing date. If not, pull complete records

## VA Environment:

1. Login to Citrix environment
2. Open Remote Desktop Server
3. Open Internet Explorer and go to vbms website
4. Authenticate with the user name, password and pin
5. Search for medical record using File #. Verify that the name and DOB match with the information from EMS application
6. Go to Documents
7. Manually download documents from 2 tabs – eFolder and Legacy Content Manager into a folder
8. Rename the folder with File # and Operators first name initials and last name
9. Open WinSCP and connect to Operator’s laptop
10. Transfer downloaded files from VA Server to Operator’s laptop

Copy and paste the folder from WinSCP folder to local folder in Operator’s laptop. Right click on the folder and click on combine files using Acrobat Reader. If there are no errors or warnings, place the folder in IN15 folder. Every 15 min, a program runs on this folder to merge the pdf files to one pdf file. This merged file is placed in Merge folder.

Once the file is in Merge folder, copy the file to Archive folder and update the comment field in EMS application with the number of pages in merged PDF file.

# Proposed Process



1. Bot will run on each of the operator’s laptop
2. Operator will manually login to citrix enviroment
3. VES will provide a text file everyday which contains the list of all the verterans details whose medical records have to be downloaded
4. File will be placed in VA Citrix environment. It will be in the format – VBMSExport\_Date\_FileNumber\_OperatorFirstName\_OperatorLastName
5. Based on the operator who is logged into the system, the bot should process the file
6. VBMS login details will be maintained in orchestrator - static username, static pin, static station id, and the password changes every 45 days. Password will be updated in Orchestrator by the operators every 45 days
7. Using the credentials, bot will login to VBMS website, search for File #
8. Go to Documents tab, eFolder, download the files based on document type and subject. VES will provide Tecnics with the list of document types with the subject, which has to be downloaded
9. Go to Documents tab, Legacy content manager, download the files based on document type and subject. VES will provide Tecnics with the list of document types with the subject, which has to be downloaded. *Note: Only 5 files can be selected at a time. When clicked on download, each of the file will be opened. Bot has to rename the file and save it. Files can be saved with any name. Ex: 1, 2, 3, etc.*
10. Rename the folder to “FileNumber Operator\_Initials Last\_Name”
11. Upload the folder to VES Server (Operators laptop) using WinSCP
12. Copy from FTP to local folder in Operators laptop
13. Combine files and check for errors: Right click on folder, click on combine with acrobat reader, and verify that there are no errors. Errors can be related to:
    1. Signatures: Click on Combine Files
    2. Password Protection: Click on combine files. When the password prompt appears, enter the possible passwords (Will be maintained in a file in Orchestrator). If all the provided passwords don’t work, place the folder in Errors folder and proceed with next record from the text file
    3. Any other error: Open the PDF, click on lock icon, print the file to image. Optimize the file and replace the file in the folder. Try to combine the files again. If unsuccessful, place the folder in Errors folder and proceed with next record from the text file
14. If Combine Files is successful, delete the individual files from Operators machine
15. Place merged file in Archive Backup folder, and delete the file from Operators machine
16. Report and Email Notification:
    1. A report should be created with 3 tabs – Success, Failure and Summary. On a high level, the report should have following fields:
       * File number
       * Number of pages in merged file
       * Status
       * Error message
    2. This report should be emailed to the users at the end of the day