eFolder Modernization User Guide

VA | U.S. Department of Veterans Affairs

ABD
Automated Benefits Delivery
VBA's Technology People
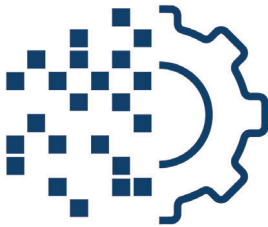
What is eFolder Modernization?

eFolder Modernization, also known as the Claims Evidence User Interface (UI), is a modernized and updated version of the current VBMS eFolder. This modernization presents no lost functionalities for end users.

VBMS end-users will see a modernized user interface, beginning in the Third Quarter, Fiscal Year 2023. This modernization will not impact existing functionality, but users should notice a different appearance and feel when interacting with Veteran eFolders.

This guide introduces the new Claims Evidence User Interface

1: CLAIMS EVIDENCE DOCUMENT TABLE

The documents table in Claim Evidence UI displays files associated with a specific Veteran. From here, documents can be viewed, moved, and annotated as needed.

Users can select the *table preferences* button to choose the columns they want displayed. Users can save these preferences by selecting the *table preferences* button. Columns can be dragged to the left or right to change the order of the table. To pin a column to the left or right, select the column name and drag it to the left or right side of the table until the pin icon is shown. To sort a column, select the column name. To change the sort direction or remove the sorting, select the column name again. **Users will need to establish their table preferences in Claims Evidence.**

	New Mail ⇕	Receipt Date 1▾	Storage Date 2▾	Document Type ⇕	Subject ⇕	Indicators	Document Title ⇕	Document Category ⇕	Text Searchable ⇕	System Source ⇕	Sour
☐		05/11/2023	05/11/2023	Education - General	Work Study	Annotated	WORK STUDY ALLOWANCE VBA-22-8691-ARE.pdf	Education	Searchable	ClaimEvidenceUI	
☐		04/21/2023	04/21/2023	Education - General	Statement Support Demo	Annotated	STATEMENT SUPPORT OF CLAIM VBA-21-4138-ARE.pdf	Education	Failure to Process	ClaimEvidenceUI	
☐		04/20/2023	04/20/2023	General Records Request (Non-Medical)	Diabetes Text Search Sample		Diabetes - Wikipedia.pdf	Correspondence	Searchable	ClaimEvidenceUI	
☐		04/05/2023	04/05/2023	VA 22-1990c Certification of Affirmation of Enrollment Agreement	CERTIFICATE AFFIRMATION		CERTIFICATE AFFIRMATION 22-1999c.pdf	Education	Searchable	ClaimEvidenceUI	
☐		04/05/2023	04/05/2023	VA Form 22-1990t Application for Individualized Tutorial Assistance	TUTORIAL ASSISTANCE	No Evidentiary Value	TUTORIAL ASSISTANCE VBA-22-1990t-ARE.pdf	Vocational Rehabilitation and Employment Documents	Searchable	ClaimEvidenceUI	
☐	Opened by Me	04/05/2023	04/05/2023	General Records Request (Non-Medical)	REQUEST VA FORMS	Last Opened Annotated	REQUEST VA FORMS VBA-20-8800-ARE-2023-04-05T13.43.53.pdf	Correspondence	Searchable	ClaimEvidenceUI	
☐		04/04/2023	04/04/2023	VA 21-686c Application Request To Add And/Or Remove Dependents	REQUEST ADD REMOVE DEPENDENTS		REQUEST ADD REMOVE DEPENDENTS VBA-21-686c-ARE.pdf	Dependency	Searchable	ClaimEvidenceUI	
☐	Opened by Me	03/28/2023	03/28/2023	Award Print		Annotated	20230328111748_datasheet.pdf	Awards / Disallowance	Searchable	VBMSA	
☐		03/28/2023	03/28/2023	Rating Decision - Narrative	Rating Decision - Narrative		20230328110102 - narrative.pdf	Rating Decisions	Searchable	RATING	
☐		03/28/2023	03/28/2023	Rating Decision - Codesheet	Rating Decision - Codesheet		20230328110102 - codesheet.pdf	Rating Decisions	Searchable	RATING	

Actions ⇕ | Upload Document | Last Opened Document | Priority OCR | Table preferences ⇕

Items Per Page 10 ⇕ | Skip to Page [ ] Go | 1 2 Next >

2: CLAIMS EVIDENCE DOCUMENT TABLE COLUMNS

The following table outlines columns available in the Claims Evidence UI and the sortable status.

Column	Description	Sortable
Subject	Document subject	Yes
Document Title	Title of the document	Yes
Document Type	Displays the document type. The document can be viewed and annotated when selecting the hyperlink.	Yes
Document Category	Category of the document	Yes
Receipt Date	Date the VA received the document	Yes
Storage Date	Date the document was stored	Yes
System Source	System from which the document was uploaded	No
Source Comment	Comments pertaining to the document source	No
Uploading User Role	The role of the user who uploaded the document	Yes
Uploading User	Username of the user who uploaded the document	Yes
Sensitive Record Access Level	Level of access the uploading user has to view document types	Yes
Originator First Name	First name of the user who uploaded the document	Yes
Originator Last Name	Last name of the user who uploaded the document	Yes
Uploading User VA Issued Email	The email address of the user who uploaded the document	Yes
EP	The End Product code related to the document	Yes
Document ID	Unique document identifier	No
File Type	The file type of the uploaded document	No
Tools	Actions users can take for the specified document	No
Claimant SSN	The Claimant's Social Security Number related to the document	Yes
Claimant Participant ID	The Claimant's Participant ID related to the document	Yes
Claimant First Name	The Claimant's First Name related to the document	Yes
Claimant Last Name	The Claimant's Last Name related to the document	Yes
Claimant Date of Birth (DOB)	The Claimant's Date of Birth related to the document	Yes
Indicators	Identifies if a document has annotations, is a best copy, has been recently opened, and other details	No
Text Searchable	Individual OCR status of a given document	Yes
New Mail	Indicates whether a document is new or has been opened	Yes
Associated Claims	Lists claims the document is associated to	No
Contention Annotations	Includes a link with contention annotation detials	No
Bookmarks	Lists bookmarks and includes a link to bookmark comments	No

3. CLAIMS EVIDENCE FILTERS

Claim Evidence UI provides several filters which users can apply to search through files to find the requested information. Upon selecting the *Filter Results* button, the table is reloaded with the applied filters. The following is an overview of the filters and how they operate.

Keyword
This allows the user to add up to thirty keywords. Users can either type and select the Add Keyword button or press the spacebar to automatically add a new keyword. Adding more keywords increases the number of results, (Example: adding both keywords "contention" and "leg" will bring up all files which have data on the table containing either "contention" OR "leg").

Document Views
This allows the user to select one of the following document views: All - (default selection) filters for all files that are not marked as "Archive Bin." Active Evidence - This filters for all files not marked as "Archive Bin" or "No Evidentiary Value." No Evidentiary Value - This filters for all files marked as "No Evidentiary Value." This can also include files marked as "Archive Bin" if they are also marked as "No Evidentiary Value." Veteran Level - This filters for all files which have Veteran level document types. Archive Bin - This filters for ONLY files marked as "Archive Bin." This can include documents also marked as "No Evidentiary Value" if they are also marked as "Archive Bin." Display Duplicates (Checkbox) This allows the user to select whether the system displays files marked as duplicates. By default, this is not selected.

Document Title
This allows users to enter a document title to filter by. Only one complete title can be entered at a time. Partial titles will not return results.

Document Category
This selection displays all the available document categories users can filter by.

Document Type
This selection displays all the available document types users can filter by.

Claims
This selection displays all the available claims associated with the veteran. Users can select multiple claim checkboxes to filter and retrieve files which are associated with those claims via the claim association tool or selected upon upload.

End Product Code
This selection allows users to select multiple End Product codes which to filter by. Multiple ep codes can be selected by typing/selecting EP code titles from the dropdown.

3. CLAIMS EVIDENCE FILTERS CONT.

Receipt Date

This allows users to select a receipt date range to filter by. This filter consists of three inputs: one for month, one for day, and one for year. All inputs must be entered for the date to be valid. Only one date in the range is required. If only one date is entered the date range is considered open.

Storage Date
This allows users to select a storage date range to filter by. This filter consists of three inputs: one for month, one for day, and one for year. All inputs must be entered for the date to be valid. Only one date in the range is required. If only one date is entered the date range is considered open.

Line of Business

This allows the user to select one of the following lines of business:
None - (default selection) filters for no lines of business are being used.
Board of Veterans Appeals
Compensation & Pension Services
Education
Fiduciary Service
Insurance
Loan Guaranty
National Cemetery Service
Veteran
Veteran Benefits Administration Service
Veterans Health Administration
Veterans Service Organization
Veteran Readiness & Employment

Bookmarks
This allows users to filter by bookmarks that have been added to documents. Users can select on of the following bookmarks:
Medical
Appeals
Peer Review
Working Notes
Deferral
Dependency

3. CLAIMS EVIDENCE FILTERS CONT.

System Source
This allows the user to filter by system source. Users can select multiple system sources.

Content Source
This allows the user to select one of the content sources listed in the Policy Decision Document. Users can select multiple content sources.

Claimant SSN
This allows users to select a Social Security number to filter by. This filter consists of three inputs: one for 3 numbers, one for 2 numbers, and one for 4 numbers. All inputs must be entered for the social security number to be valid.

Claimant Participant ID
This allows users to input a Participant ID number to filter by. This filter consists of a single input: one text field for 8 or more numbers. All inputs must be entered for the Participant ID number to be valid.

Claimant First Name
This allows users to input a Claimant's first name to filter by. This filter consists of a single input: one text field.

Claimant Last Name
This allows users to input a Claimant's last name to filter by. This filter consists of a single input: one text field.

Claimant Date of Birth (DOB)
This allows users to select a date of birth to filter by. This filter consists of three inputs: one for month, one for day, and one for year. All inputs must be entered for the date to be valid.

Text Searchable
This allows users to search by OCR scanning status. Users can select from the following statuses:
Searchable
Not Searchable
Failure to Process

4. EDIT DOCUMENT PROPERTIES

Document properties consist of general information about documents, including the name and Participant ID of the Veteran associated to the document. Some properties are shown in the Document table view, such as subject and receipt date.

Document properties are added to documents when they are uploaded to Claim Evidence and can be viewed and edited by selecting Edit Properties from the menu in the Tools column.

View Only Properties
An authorized user can view the Document ID
An authorized user can view the First Name of the participant associated to the document
An authorized user can view the Last Name of the participant associated to the document
An authorized user can view the Middle Name of the participant associated to the document
An authorized user can view the Suffix of the participant associated to the document
An authorized user can view the document Date of Upload
An authorized user can view the document Shipping Number
An authorized user can view the document Source Comment
An authorized user can view the document System Source
An authorized user can view the New Mail indicator for the document
An authorized user can view who the document has been Moved By

Editable Properties
An authorized user can edit the document Subject
For system generated documents, a message is shown indicating that the subject cannot be edited
An authorized user can edit the document Date of Receipt up to the current date for any non-VBMS generated documents
 An authorized user can edit the document Category - Type
An authorized user can edit the document Content Source

     There are only 7 roles that can edit this value:

          Natl Std Data Bus Analyst
          EDU Coach
          EDU Call Center
          EDU eFolder Read Only
          EDU SVCE
          EDU VCE
          EDU PSA

An authorized user can edit the document End Product Code
An authorized user can indicate that the document is Actionable
An authorized user can indicate that the document is Certified
An authorized user can edit the document Category - Alternate Type

5. CLAIMS EVIDENCE FILE VIEWER

View Document

This page displays a document when the user selects the document link from the document table. As the user scrolls through the document, a dotted border is placed around the page to indicate it is currently in view.

Search Document

To search the text contents of the document, enter your search phrase into the input box at the top right of the file viewer and select the *Search* button. If there are any search results, they will be highlighted in the document. The page containing the first search result will be the page that is currently in view.

To go to the next search result, select the '>' button. To go the previous search result, select the '<' button. To remove search highlights, select the *Clear* button.

6. CLAIMS EVIDENCE ANNOTATIONS

Annotate Document - Annotation Sidebar

The existing controls listed below are located on the sidebar present on the left side of the page.
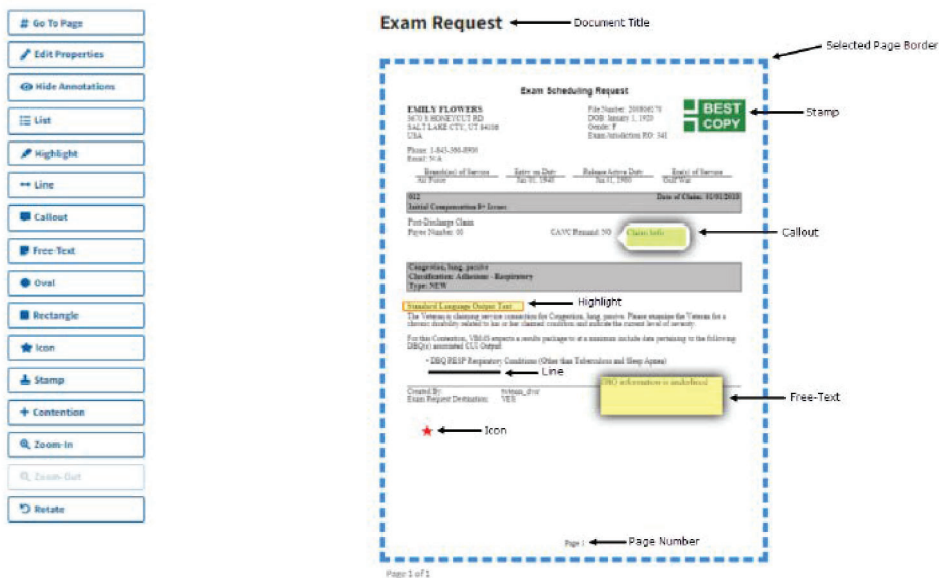
6. CLAIMS EVIDENCE ANNOTATIONS CONT.

Creating New Annotation
The following sections detail creating new annotations on the current selected page. (Indicated by a dotted blue border)

Auto-update Annotations
After you move or re-size an annotation, the position and size information will automatically be saved. When this auto-save is happening a loading spinner is displayed at the bottom left of the screen. Upon success, the loading spinner is replaced with the time and date of the last auto-save operation.

List Annotations
To see a list of all annotations in the document the user must select the *List* button in the annotation sidebar. This will reveal a scrollable sidebar with all annotations in the document. From the annotation list, you can select the *expand* icon to view details about the annotations. You can also edit, delete, and navigate to the annotation in the document from here.

View Annotation
To view an annotation, select the *List* button and expand the details for the annotation you want to view. Select the *View Annotation* button. The page where the annotation is located is shown and the annotation is highlighted in blue.

Update Annotation
To update an annotation, select the *List* button and expand the details for the annotation you want to update. Select the *Update Annotation* button. From the Update Annotation dialog, you can edit the title, comments, and other details depending on the annotation type. Select Update to save your changes.

Delete Annotation
To delete an annotation, select the *List* button and expand the details for the annotation you want to delete. Select the Delete Annotation button. Select *Yes* from the dialog to confirm you want to delete the annotation and remove it from the document.

Zoom in/out
To zoom in, select the *Zoom-In* button. The increments scale by 25% up to a maximum of 500%. To zoom out, select the Z*oom-Out* button. The increments scale by 25% to a minimum of 100%. While zoomed in, annotations cannot be created, moved, or edited.

Rotate
To rotate the document, select the *Rotate* button. Each rotation is 90 degrees clockwise. While rotated, annotations cannot be created, moved, or edited.