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## Document Management Center for Counselors

#### **Revision History**

Date	Revision	Description of Change	Author
10/21/2022	1.0	Initial release	George Martinez (TCI)



1. Introduction	
2. Accessing the Counselor's Document Management Center	
2.1. Adding a Document to the Document Management Center	
2.1.1. [Create New Word Document] Option	5
2.1.2. [Upload File] Option	
2.1.3. [Copy Agency Fil] Option	7
2.1.4. [Create Customized eSign File] Option	9
2.2. Assigning a Tag to your Document	11
2.3. Previewing a Document	13
2.4. Editing a Document	14
2.5. Setting a Description for your Document	14
2.6. Renaming your Document	17
2.7. Converting a Document to PDF	18
2.8. Download a Document	19
2.9. Deleting a Document	19
2.10. Document Version History	20
2.11. Document File Details	21
3. Processing Incoming Documents from Your Program Participants	22
4. The Program Participant's Documents Folder	27
5. Navigating your Document Folders	27
6. Adding a Document to the Program Participant's Document Folder	27
6.1. Adding a Document – Upload File Option	28
6.2. Adding a Document – Choose from Library Option	29
7. Receiving a File in e-VA from your Program Participant via Email/Text	30
8. Deleting a Document from your Program Participant's [Document] Folder	35
9. Sending the Program Participant a Document	36
9.1. Sending the Program Participant a Document via Email	36
9.2. Sending the Program Participant a Document via an Appointment	36
9.3. Sending the Program Participant a Document via an Assignment	37
10. How to Send a Document for eSignature	37
11. How the Program Participant Signs a Document for eSignature	42
12. How the Counselor Receives the eSigned Document	48



#### 1. Introduction

e-VA has created new features designed to enhance both the Counselor and the Program Participant's experience. Here is a summary of the new features:

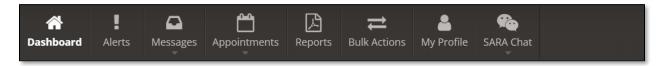
- Document Management Center feature
- Processing incoming documents from your Program Participants
- · Ability to auto convert a word doc or image file into a PDF
- eSignature capabilities

This document will guide the Counselor through these new features and functionality. This User Guides assumes the reader has completed e-VA Training.

#### 2. Accessing the Counselor's Document Management Center

This folder is for the Counselor to use to store and maintain documents and files that they would use when working with their Program Participants. The [My Documents] folder for Counselors is located in the [My Profile] section of the Counselor's account profile.

From your Dashboard select [My Profile] from the global navigation menu.



Then click on the [My Documents] tab to access your document folder.

User Informati	ion	User Settings / Customization / Signature	Work Settings / Calendar / Out My Do	Proxy and Sharing Login Lo
User Login: evel of Access: Gender: Title: Email: Office Phone: Testing SMS #: Address:	User Inform george3000. Career Cour George I Ma Male Career Cour george.mart 505-999-855 albuquerqu	counselor selor rtinez I Da Iselor linez@saraworks.com 66	Account Information Account Status: Date Created: te Last Accessed: Last Password Change: Change	User Office
External ID:	Ø Edit User Inf		My Documents	



The [My Document] tab provides you with a place to store and maintain your documents for use with e-VA and your Program Participants.

My	Prof	file									Global Client Se	arch
org	ge I M	lartinez l <mark>o</mark>										
	User	Information	User !	Settings / Customization	/ Signature	Work Settings / C	alenc	lar / Out of Office	My Documents		Proxy and Sharing	Login Log
Cre	ate New \	Word Document	oad File	연 Copy Agency File	🕼 Create Cu	istomized eSign File						
o	🗋 Na	ame			11 Modifier	d Date		Modified By		Size	Tag	
	<b>6</b> - 10	10-1045gm ABQ.docx.esign			09/29/2	022 11:50:32 AM EDT		Martinez I, George I		2.37 KB	VRE Correspondence - 1246	Ø
	<b>e</b> - 10	10-1045gm.docx			09/29/2	022 3:53:03 PM EDT		Martinez I, George I		12.35 KB	Comprehensive IL Assessment - 1192	
	<b>1</b> 0-	0-1045gmb22.docx.esign			09/29/2	022 1:17:20 PM EDT		Martinez I, George I		1.58 KB	VRE Correspondence - 1246	ß
	10	045 Willie Colon.docx.esign			09/29/2	022 3:56:15 PM EDT		Martinez I, George I		2.16 KB	VRE Correspondence - 1246	ß
	2.1	VR&E Orientation.docx			09/29/2	022 12:58:48 PM EDT		Martinez I, George I		136.64 KB	Diploma - 528	
	🝙 Ap	opendix CY Willie Colon.docx	.esign		09/29/2	022 5:46:44 PM EDT		Martinez I, George I		37.76 KB	VRE - General - 749	Ø
	VR	R-67 Willie Colon.docx			09/29/2	022 5:40:50 PM EDT		Martinez I, George I		989.76 KB	VR 67 - 1322	

#### 2.1. Adding a Document to the Document Management Center

You have several options for adding a document, you can:

- [Create New Word Document]
- > [Upload File]
- [Copy Agency File]
- [Create Customized eSign File]



You can only upload the following file types: images (.jpeg, tiff, gif, png,), PDFs, Word/Text, and Excel.

#### 2.1.1. [Create New Word Document] Option

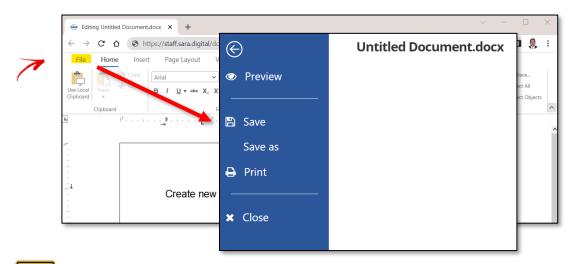
This option allows you to create a new file using a web-based Word editor app. When you click on the [Create New Word Document] option it will open the Word editor in a new tab in your web browser.

User Information	User	Settings / Customizatior	n / Signature	Work Settings / Calend
Create New Word Document	<b>⊥</b> Upload File	街 Copy Agency File	Create Cus	tomized eSign File
2 🗋 Name			1 Modified	Date
Create	e New Word	Document	L Upload F	ile
5				Management Center for

U.S. Department of Veterans Affairs



Once you have created your new document, click on [File] and then select [Save] or [Save As].



PLEASE NOTE

You can save your new document as a Word Document or a PDF.

Save File as			×
File Name	Untitled Document		.docx
File Type	Word Document (*.docx) Word Document (*.docx)		~
	PDF (*.pdf)	Cancel	Save

Give your file a name and then click on the [Save] button.

Save File as		×
File Name	Counselor Checklist	.docx
File Type	Word Document (*.docx)	~
		Cancel 🖺 Save



e-VA will notify you that the file has successfully been saved.

File Saved Successfully

File Application Incomplete.docx has been successfully saved as Application Incomplete.docx

#### 2.1.2. [Upload File] Option

This option allows you to select and upload a file from your local device.

User Information	User	Settings / Customization	/ Signature	Work Settings / C	alend
📓 Create New Word Document	1 Upload File	අ Copy Agency File	Create Cus	tomized eSign File	
2 Name	R		1 Modified	Date	J†
- 10-1045gm ABQ.docs	x.esign		09/29/20	22 11:50:32 AM EDT	

#### 2.1.3. [Copy Agency Fil] Option

You can copy a file that has been Published (made available by a higher office level at your agency) by using the [Copy Agency File] function.

User Information	User Settings / Customiza	tion / Signature	Work Settings / Calendar / C Office	Dut of My Do	ocuments	Proxy and Sharing
🗟 Create New Word Document	土 Upload File 🖉 Copy Ag	ency File	eate Customized eSign File			
C Name		🕼 Modified 🛙	Date 👫 Modified	Ву	↓† Size	↓† Tag
💼 - 10-1045gm ABQ.dc	ocx.esign	09/29/20	2 11:50:32 AM EDT Martinez	: I, George I	2.37 KB	VRE Correspondence - 1246
1045 Willie Colon.do	ocx.esign	09/29/202	22 3. 5:15 PM EDT Martinez	: I, George I	2.16 KB	VRE Correspondence - 1246

When you click on the [Copy Agency File] button a list of agency documents available is displayed.



Search		Document Type:	All Document Ty	pes 🔻					
	Document Name	17	Size	1t	Туре	ţţ			
Select	28-1903-ARE.docx		78.23 KB		VAF 28 1903 - 1484		?	۲	
Select	10-5345.docx		26.73 KB		VAF 10-5345 - 415		?	۲	
Select	10091.docx		34.72 KB		VAF 10091 - 954		?	۲	
Select	10182.docx		49.70 KB		VAF 10182 - 1250		?		
Select	20-0995.docx		91.97 KB		VAF 20 0995 - 1249		?		
Select	21-0304.docx		40.53 KB		VAF 21 0304 - 1175		?		



Allows you to create a copy of the document for your [My Documents] folder



Allows you to view a description of the document



Allows you to preview the document

The [Document Type] option allows you to filer the list by document types based on the document tag.

reate a C	Copy of an Agency	Document				Ō	1
Search		Document Type:	All Document Types 🕶				
	Document Name	†₽	VAF 22 8794 - 1267 VAF 2237 - 1173		ţ†		
Select	28-1903-ARE.docx		VAF 28 0588 - 740	8 1903 - 1484	?		
Select	10-5345.docx		VAF 28 0787 - 1294 VAF 28 0791 - 1480	0-5345 - 415	?	۲	
Select	10091.docx		VAF 28 0794 - 1253	0091 - 954	?	۲	
Select	10182.docx		VAF 28 0800 - 1479 VAF 28 0814 - 1254	0182 - 1250	?	۲	
Select	20-0995.docx		VAF 28 0850 - 1256 VAF 28 0851 - 1164	0 0995 - 1249	?	۲	
Select	21-0304.docx		VAF 28 0852 - 1165	1 0304 - 1175	?		



**2.1.4. [Create Customized eSign File] Option** This option allows you to create a customized eSign document from a set of eSigned documents available.

	rmation	User Settings /	Customization / Signature	Work Se	ettings / Calendar / Out of Office		My Documents		Proxy ar	d Sharing
🕅 Create New W	ord Document	Upload File	월 Copy Agency File 🛛 🕝 C	Freate Custo	mized eSign File					
C Nam	1e		11 Modified	Date	🕼 Modified By		↓† Size	lî 1	Tag	
<b>M</b> - 10-	1045gm ABQ.docx.e	sign	09/29/20	22 11:50:32	AM EDT Martinez I, Ge	orge I	2.37 KB	,	VRE Corre	spondence - 124
Troato Ci	uctomized				,					Ō
Search	ustomized			All Docu	iment Types ▼					
	Documer		Document Type:	All Docu		lî T <u>i</u>	уре	↓î		
	Documer		Document Type:				<b>уре</b> ′АF 10-0103 - 1269	ţţ	?	•
Search	<b>Documer</b> 10-0103-	nt Name	Document Type:		Size	V		ţţ	?	•
Search Select	<b>Documer</b> 10-0103- 28-8606g	nt Name fill.docx.esigr	Document Type:		<b>Size</b> 187.26 KB	V	'AF 10-0103 - 1269	ţţ		
Search Select Select	<b>Documer</b> 10-0103- 28-8606g	n <b>t Name</b> fill.docx.esigr gm.docx.esigr	Document Type:		Size 187.26 KB 72.76 KB	V	/AF 10-0103 - 1269 /AF 28 8606 - 739	ţţ	?	۲

Click on [Select] for the document you want to Customize.

			OMB Approved No. 2900-0132 Respondent Burden: 10 minutes Expiration Date: 6/30/2024
Department of Veteran	NOTICE	~~	
APPLIC	You are editing a copy of an agency- provided document. After you make any		SING OR
PRIVACY ACT NOTICE: VA will not di: Act of 1974 or Title 38, CFR 1.576 for ro identified in the VA system of records; Adapted Housing Applicant Records, and Y retain benefits. Giving usy our SSN account will not deny an individual benefits for refu prior to January 1, 1975, and still in effect	desired changes, saving the file will crea a copy of it in "My Documents"	red legi	what has been authorized under the Privac ress when requested for statistical purpose Hom e Loan Applicant Records, Special ister. Your response is required to obtain ir SSN under Title 38, CFR 3.809. The V equired by a Federal Statute of law in effec
RESPONDENT BURDEN: We need this i grant. Title 38, U.S.C. 2101(a) or 2101(b) allows us to ask the information, and complete this form. VA	cannot conduct or sponsor a collection of information OMB Internet Page at <u>www.seginfo.gov/public/do/PR.</u>	lv of 1 unless a va	
INSTRUCTIONS: This application sho completed online by visiting <u>www.eben</u>	ald be submitted to the VA regional office where efits.va.gov.	e your c <b>h</b> i	im file is located or this form can be
1. FIRSTNAME - MIDDLE INITIAL - LAST NAME	2. SOCIAL SECURITY NO.		3. VA FILE / CLAIM NUMBER
4. DATE OF BIRTH (MM/DD/YYYY)	5. E-MAIL ADDRESS	_	

e-VA will notify you that you are editing a copy of an agency-provided document. After making your changes, saving the file will create a copy of your customized file in your [My Documents] folder.

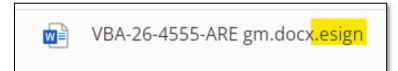
When	saving	the file	, you will	want to	aive	the	custom	doc a	unique	name:
VVIIOII	ouving		, you wiii	want to	9.00	uio	ouotonn	u00 u	annquo	numo.

	e File as			×
facili EMARH	File Name	VBA-26-4555-ARE gm.docx		.esign
			Cancel	Save

You custom eSign doc will now be part of your [My Documents] folder, for use as needed.

	036	er Information	User Setting	s / Customization / Sign	lature		Calendar / Out of fice	My Documen		Proxy and Sharing		Login Log
🗟 Cre	eate N	New Word Document	1 Upload File	ද්ව Copy Agency File	🕼 Crea	te Customized e	sign File					
0	D	Name		↓L M	lodified Dat	e I	Modified By		Size	Tag		
	<b>1</b>	- 10-1045gm ABQ.doc	ox.esign	0	9/29/2022	11:50:32 AM EDT	Martinez I, George I		2.37 KB	VRE Correspondence - 1246	5	Ø
		1045 Willie Colon.doc	x.esign	0	9/29/2022	3:56:15 PM EDT	Martinez I, George I		2.16 KB	VRE Correspondence - 1246	5	ß
		Appendix CY Willie Co	olon.docx.esign	0	9/29/2022	5:46:44 PM EDT	Martinez I, George I		37.76 KB	VRE - General - 749		ß
	<b>(</b> )	Doc for Signature.doc	x	1	0/16/2022	10:39:34 AM EDT	Martinez I, George I		4.67 KB			
		VBA-26-4555-ARE gm	.docx.esign	1	0/16/2022	1:03:20 AM EDT	Martinez I, George I		97.73 KB	VAF 26 4555 - 168		R

Note that eSign documents have a .esign file extension.

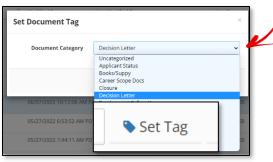




#### 2.2. Assigning a Tag to your Document

Select your document by placing a check mark by it. This will reveal a [Set Tag] action button that you can use to give your document a Tag.

Click on the [Set Tag] button and select a Tag from the Document Categories drop-down.



You Can also click on the dotted line in the Tag column corresponding to your document.

C Name	↓ Modified Date ↓↑ Modified By	tî عالم ال	ţ
Application Acknowledgement VR22.docx	06/07/2022 10:12:06 AM PDT Martinez III, George III	4.67 KB	1

The Set Document Tag window will appear. Use the drop-down menu to select your Tag. Then click on the [Save] button to set the Tag.

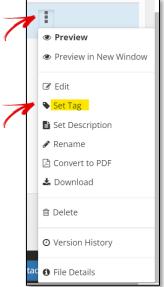
Set Document Tag		×	VRE - General - 74
Document Category	Uncategorized	~ <mark>4</mark>	
	VAF 28 1905m - 743		<b>^</b>
	VAF 28 1905n - 1264 VAF 28 1905p - 1265		
	VAF 28 1905r - 1470 VAF 28 1910 - 1485		
10/16/2022 9:32:48 AM MDT	VAF 28 8606 - 739		
10/10/2022 9.32.40 ///////01	VAF 28 8739a - 1171 VAF 28 8832 - 1172		
10/16/2022 9:03:20 AM MDT	VAF 28 8861 - 735		8
	VAF 28-1905 - 737 VAF 3288 - 175		
	VAF 5266 - 175 VAF 5655 - 1174		





To change the already set Tag, click on the Tag name and the [Set Document Tag] window will appear. Here you can set a different Tag for the document.

You can also use the *more options* icon, the 3 vertical dots (an ellipsis) in the last column in the row that displays your document, to set your Tag.

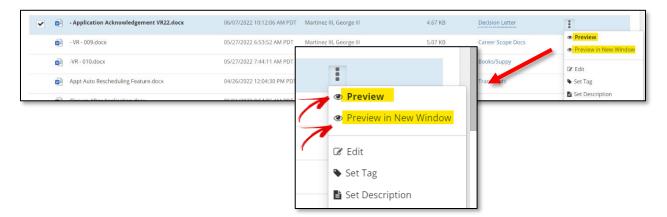




#### 2.3. Previewing a Document

You can preview a document within the same window you are viewing or you can preview the document in a new Window.

To view the document within the same window you can click on the document name itself OR select [Preview in New Window] from the more options icon, the three vertical dots.



The preview has several options such as zoom, search, and print capabilities.

	2 🕘 🗛 Logout Martinez III
Preview Document	×
🔟 100% 🗸 🖸 🖉 🖉 🖉 🔚 🖶 Search	
Create New File Here.	
Greate reet inter lief.	
< 1/1 >	
PAGE4 0 E 1 1096	Application Acknowledgement VR22 docx
• File Details	Close
O'ne deally	close
Pa generating © 2022 Ali Rights Reserved - The Career Index	Constant Task Summer R

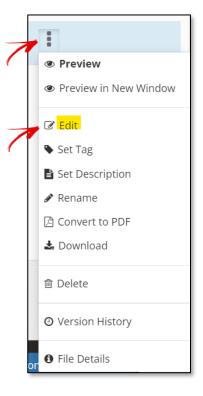


#### 2.4. Editing a Document

You can edit a Word document by selecting [Edit] from the *more options* icon, the three vertical dots. Your document will appear in the word editor in a new tab in your web browser.

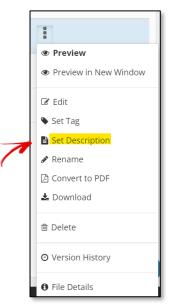


Note that you cannot edit a PDF.



#### 2.5. Setting a Description for your Document

You can set a description for your document by selecting [Set Description] from the *more options* icon, the three vertical dots.





U.S. Department of Veterans Affairs This feature allows you to add a description of the document that will be helpful for other e-VA Counselors. When you select this option a [Set Document Description] window appears. Simply add your description and click on [Save].

Set Document Description	×
Description	
This is the standard form used for a 10 day notice.	
	1
	Cancel 🖺 Save

e-VA Counselors will be able to view the description of the document before using it. The screenshot below shows how the e-VA Counselor would be able to view the document description.

hoose	noose From Library									
Search		So	urce: Agency Fi	les 🔻	Document Type: All Doc	ument Ty	oes 🔻			
	Document Name	ĻΈ	Size	↓†	Туре	↓î			Source	↓ <b>F</b>
	28-1903-ARE.docx		78.23 KB		VAF 28 1903 - 1484		?	۲	Agency	
	10-5345.docx		26.73 KB		VAF 10-5345 - 415	1	?	۲	Agency	
	10091.docx		34.72 KB		VAF 10091 - 954		?	۲	Agency	



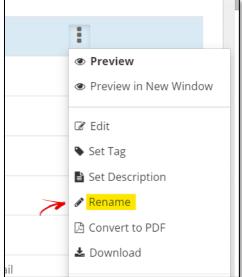
The e-VA Counselor would click on the question mark icon in the [Choose From Library] window to view the document description.

	Office		
py Agen	Set Document Description	×	
	Description		ļ†.
	This is the 28-10212 for Program Participant Wyatt Earp		
		1	
		Cancel 🖺 Save	
	10/17/2022 4/24/E1 DM MDT Martinez L Coorge L	72.04.1/P	



#### 2.6. Renaming your Document

You can rename your document by selecting [Rename] from the *more options* icon, the three vertical dots.



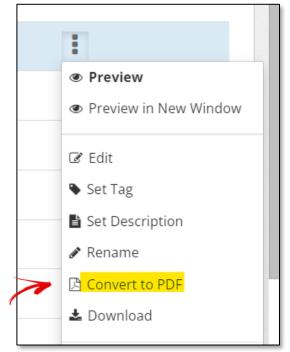
The [Rename File] window appears. Rename your document and click on [Save] to save your changes.

Rename File		×
File Name	28-10212 for Wyatt Earp	.docx
	Cancel	🖺 Save

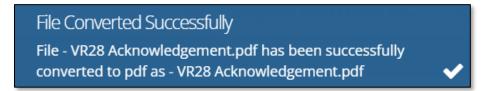


#### 2.7. Converting a Document to PDF

You can convert a document to PDF by selecting [Convert to PDF] from the *more options* icon, the three vertical dots.



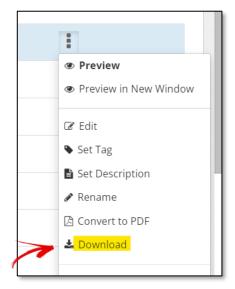
e-VA will convert the file to a PDF and place it in the same folder of the original file. e-VA will also display a confirmation message once complete.





#### 2.8. Download a Document

You can download a document from the e-VA Document Management Center by selecting [Download] from the *more options* icon, the three vertical dots.

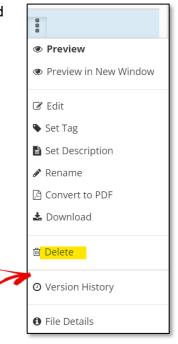


#### 2.9. Deleting a Document

You can delete a document by selecting [Delete] from the *more options* icon, the three vertical dots.



- Documents locked for eSignature cannot be deleted
- Documents added by other Staff cannot be deleted
- Deleted documents cannot be recovered



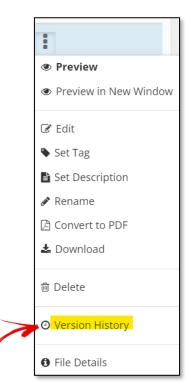


You can also delete a document by placing a check mark by the document and clicking on the [Delete] button in the table header section.

George I Martinez I o										
User Information	User Settings / Customiza Signature		ttings / Calendar / uut of Office	My Docu	ments	Proxy and Sharing	Login Log			
Create New Word Docume		] Copy Agency File <b>Nodified Date</b>	Set Tag Delete	<b>لا</b>	Size J1	Tag ↓î				
Application Do Incomplete.do		6/16/2022 8:53:52 M MDT	Martinez I, Scorge I		4.69 KB	Applicant Status	:			
Mail Application Inco		6/16/2022 8:56:31 M MDT	🛍 Delet	e	4.67 KB	Applicant Status				

#### 2.10. Document Version History

You can view the version history for a document by selecting [Version History] from the *more options* icon, the three vertical dots.





Version history allows you to see when and by who edits were made to the document. You can download the document or restore the document to its previous version by selecting either [Download], or [Restore to this Version] from the *more options* icon, the three vertical dots, applicable.

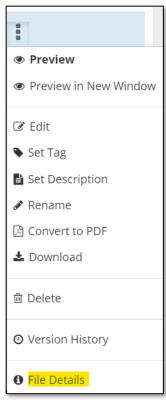
Version	History			© ×
Version	Modified Date	Modified By	Size	
2.0	06/08/2022 12:33:19 PM PDT	Martinez III, George III	4.69 KB	:
1.0	06/08/2022 12:28:50 PM PDT	Martinez, Rosa	4.66 KB	
				▲ Restore to this Version
				Z Download

#### 2.11. Document File Details

You can view the version history for a document by selecting [Version History] from the *more options* icon, the three vertical dots.

The File Details provides you with the Document name, File Size, File Type, When Created, Who Created it, when it was Last Modified and by who.

e Details		© ×
File Name	- VR28 Acknowledgement.docx	
File Size	4.69 KB	
File Type	📷 Word Document	
Created	06/08/2022 12:20:35 PM PDT by Martinez III, George III	
Last Modified	06/08/2022 12:20:35 PM PDT by Martinez III, George III	
Versions	1	
		Close
		Close
_		Close
		Close





#### 3. Processing Incoming Documents from Your Program Participants

All incoming documents/files are now vetted by the Counselor before the document/file can become part of the case note. This includes unsolicited documents/files as well as the Program Participant returning a document/file that you sent them.

When your Program Participant sends you a file via email or text, e-VA notifies you via two Alerts, a **Black** Alert and a **Purple** Alert.

A Client Overvie		arp					Global Client Search	
505-999-85	rtinez@saraworks.com		State Curr	aary Career Counselor: G e Denver rent Track: Training k Start Date: 07/06/202:				
Profile	Alerts (2)	Communicat	ions	Appointments	Assignments (4)	Documents	Case Notes	Reassign / Share / Refer
Level II Date	1k	Viewed 1	Excerpt					
07/11/2022 4:5	7:19 PM MDT	New	Document received via E	mail. Please process for	verification.			Ð
O7/11/2022 4:5	7:18 PM MDT	New	Subject: File for My Recor	ds				0
Profile A	lerts C (2)	ommunicat	ions App	pointments	Assignme (4)	ents Documen	ts Case Notes	Reassign / Share / Refer
Level ↓↑	Date		ţ	Viewed	↓↑	Excerpt		
	07/11/202	2 4:57:19 PN	M MDT	r	New	Document receiv process for verif		lease 📀
۵	07/11/202	2 4:57:18 PN	M MDT	1	New	Subject: File for I	My Records	0





**Black Alert** – Informs you that the messages was an email or text message and includes the file sent. NOTE that the attachment is not yet part of the Case Note, it is only part of the Alert.

٢	07/11/2022 4:57:18 PM MDT	07/11/2022	Subject: File f	for My F	Records	٢
		Ø Mark as New	🖂 Send Email	📞 Call	🛗 Setup Appointment	+ Add Case Note
O7/11	/2022 4:57:18 PM MDT - Email - From: To	: George I Martinez	I			
Subject: Fi	le for My Records					
Hello Geor	ge,					
Here is the	file for my records.					
Wyatt Earp	)					
Attachmer	nt(s) <mark>:</mark> Wyatt Earp History.docx (11.71 KB)					
			🖨 Print thi	is Case N	Note View All Alerts	/iew All Case Notes

Purple Alert – Informs you that you need to process the received document (file) for verification before it can become part of a case note. NOTE that the attachment is not yet part of the Case Note, it is only part of the Alert.

To process the received file for verification, click on the [Process Received Document] button.

	07/11/2022 4	:57:19 PM MDT	07/11/2022	Document received via Email. verification.	Please proc	ess for	0
<b>[2]</b> 07/11/	/2022 4:57:19 P	M MDT - SARA Note			Process	Received Documen	t
Document	received via Em	ail. Please process for verif	ication.		)		
Document	Status: Not Veri	Document receive verification.	ed via Email. Pl	ease process for	0	View All Case Notes	s
		<b>1</b>	Mark as New	Process Received Docu	iment		



Click on the document link to download and view the file.

Process Received Document/Image

Please process the provided document by either approving or rejecting it. Approval will result in the document being added to the client's document library.
Provided Document

Wyatt Earp History.docx (11.71 KB)

Current Status
Not Verified

Action
Approve
Reject
No Action
No Action

If after you have verified the file and it is acceptable, select [Approve].

e-VA will provide you with the option to give your document a category (a Document Tag). e-VA will also automatically convert the file to PDF. You can also enter a note in the [Reason] field that will become part of the case note.

Process Received Doc	ument/Image	οx
Approval will result in the	vided document by either approving or rejecting it. document being added to the client's document library 2w GM1.docx (132.09 KB)	
Current Status Action Note: Do	Not Verified Approve Reject No Action cument approval can not be undone.	
Document Category	Uncategorized	~
This document will automati	cally be converted to a pdf file upon approval	
	Cancel	<i>i</i> , Save



ο×

Cancel

Once done, click on [Save]. e-VA will create the case note to include the file as an attachment.

Profile	Alerts	Communications	Appointments	Assignments (4)	Documents	Case Notes	Reassign / Share / Refe
Show: All	Search		<b>Q</b> Run Search	Has Attachments			+ Add Case Note
		<b>59 PM MDT</b> - Uncategoriz t Earp History.pdf] added			ents\Uncategorized)	by George I	
	Martinez I	/yatt Earp History.pdf (12.3					

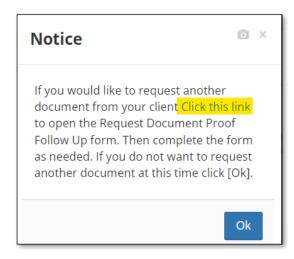
If after you have verified the file and find that it is unacceptable, select [Reject]. Add a note for the reason for rejecting the file and click on [Save]. That note will become part of the case note.

Process Received Document/Image	© ×
Please process the provided document by either approving or rejecting it. Approval will result in the document being added to the client's document library.	
Provided Document	
Wyatt Earp History.docx (11.71 KB)	
Current Status	
Not Verified	
Action	
Approve Reject No Action	
Reason	
	1.
Cancel	ave

**07/11/2022 6:27:25 PM MDT** - Uncategorized - Proof Rejected Document [Wyatt Earp History.docx] Rejected by George I Martinez I with reason: Client sent the wrong file.



e-VA will also provide you with the option to send the Program Participant a new request for the file.



Selecting [No Action] will keep the Processing Process open so that you can complete the process at a later time.

Pr	ocess Received Do	ocument/Ima	age		Ø×
	<b>Please process the p</b> Approval will result in t				
	Provided Wya Document	tt Earp History.doo	x (11.71 KB)		
	Current Status Action	Not Verified Okpore	O Reject	No Action	
					Cancel



### 4. The Program Participant's Documents Folder

The Program Participant's [Documents] folder is organized with the following sub folders.

All Program Participant Folders are organized the same way. These folders cannot be edited or deleted nor can you add any new folders.

Profile	Alerts	Communications	Appointments	Assignments	Documents	Case Notes	Reassign / Share
Client Doc	uments					Send Document for	Signing 🛛 Add File 👻
<b>2</b> ] M	Jame		1 Added Date	↓F Added B	у	↓î Siz	e Ĵî
A	Il Client Documents						
<b>—</b> 6	Signature Document	IS					
	Other Documents						
F	Received Documents						
<b></b> 5	ent Documents						

#### 5. Navigating your Document Folders

Clicking on the folder will take you into that folder and sub folders where applicable. To navigate back up your folders, click on the Folder Name in the folder menu.

Protije	Alerts	Communications	Appointments (1)	Assignments	Documents	Case Note:	s Reassign / Share / Refer
Client Documents	> Other Documents	> All Other Documents				G# Se	nd Document for Signing Add File -
2 🗋 Name		11 Added Dat	te ↓₹ Added E	Зу	J† Size	11 Location	L†

## 6. Adding a Document to the Program Participant's Document Folder

You can add documents to the Program Participant's folders by using the [Add File] from down menu.





#### 6.1. Adding a Document – Upload File Option

You can add documents to your Program Participant's Folders by uploading a file from your PC/Laptop/Device.

Upload File		٥
Upload a file		Browse
Document Category	Uncategorized	`
	cally be converted to a pdf file upon uploa	d
	Cancel	🛓 Upload File

Note that the file will automatically be converted to PDF?

You can also categorize the document by using the [Document Category] drop down menu.

Once the document has been uploaded it will be stored in the Program Participant's folders based on the document category. e-VA will display a file uploaded confirmation message that will tell you file location.



#### 6.2. Adding a Document – Choose from Library Option

You can add documents to your Program Participant's Folders by selecting a file from the e-VA library.

- Select the document by placing a check mark by it and then simply click on the [+Add File] button
- Use the [Search] field to search for a document
- Clicking on the table headers allows you to sort the table by that header

Search	Source: All Files ▼ Do	cument Type: A	Il Document Types 🔻				
	Document Name	Size ↓↑	Type ↓↑			Source	11
~	VA form 28-0968.docx	58.18 KB	Decision Letter	?	۲	Agency	
	VR Form 24b.docx	4.66 KB	Applicant Status	?	۲	Agency	
	Application Documents Incomplete.docx	4.69 KB	Applicant Status	?	۲	User	
	Application Incomplete.docx	4.67 KB	Applicant Status	?	۲	User	
	VA form 28-0968 gm2.docx	23.89 KB	Decision Letter	?	۲	User	
	VA form 28-0968.docx	23.89 KB	Decision Letter	?	۲	User	

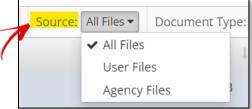


Allows you to view a description of the document



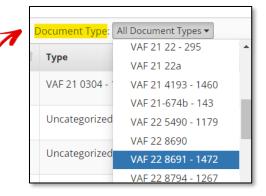
Allows you to preview the document

[Source] drop down menu allows you to filter the list by Counselor Files (Your files) or Agency Files.



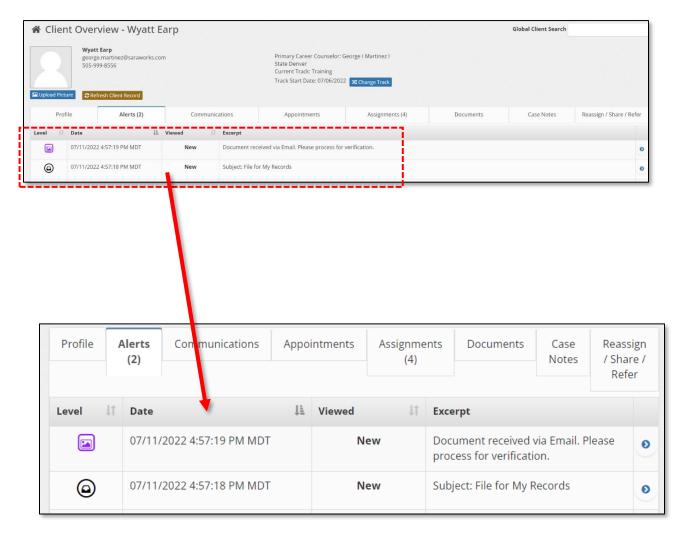


[Document Type] drop down menu allows you to filter the list by Document Categories.



## 7. Receiving a File in e-VA from your Program Participant via Email/Text

When your Program Participant sends you a file via email or text, e-VA notifies you via two Alerts, a Black Alert and a Purple Alert.



۵

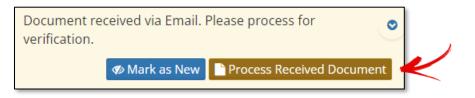
**Black Alert** – Informs you that the messages was an email or text message and includes the file sent. NOTE that the attachment is not yet part of the Case Note, it is only part of the Alert.

۵	07/11/2022 4:57:18 PM MDT	07/11/2022	Subject: File f	for My Rec	ords	٥	5
		🌮 Mark as New	🖂 Send Email	📞 Call  🗎	Setup Appointment	+ Add Case Note	
$\smile$	/2022 4:57:18 PM MDT - Email - From:	Γο: George I Martinez I					
Subject: Fil	e for My Records						
Hello Georg							
Wyatt Earp	file for my records.						
	t(s): Wyatt Earp History.docx (11.71 KB)						
Audenmen		•	🖨 Print thi	is Case Not	e View All Alerts V	/iew All Case Notes	

**Purple Alert** – Informs you that you need to process the received document (file) for verification before it can become part of a case note. NOTE that the attachment is not yet part of the Case Note, it is only part of the Alert.

	07/11/2022 4:57:19 PM MDT	07/11/2022	Document received via Email. Please process for verification.	0
	/2022 4:57:19 PM MDT - SARA Note received via Email. Please process for v	verification.	🛷 Mark as New 📄 Process Received Docur	ment
Document	Status: Not Verified		Print this Case Note View All Alerts View All Case N	lotes

To process the received file for verification, click on the [Process Received Document] button.





Click on the document link to download and view the file.

Process Received Document/Image	Ō×
Please process the provided document by either approving or rejecting it. Approval will result in the document being added to the client's document library	1.
Provided Document	
Wyatt Earp History.docx (11.71 KB)	
Current Status	
Not Verified	
Action	
Approve Reject No Action	
Са	ncel

If after you have verified the file and is acceptable, select [Approve].

e-VA will provide you with the option to give your document a category (a Document Tag). e-VA will also automatically convert the file to PDF. You can also enter a note in the [Reason] field that will become part of the case note.



Process Received Doc	ument/Image	οx
Approval will result in the	vided document by either approving or rejecting it. document being added to the client's document library	
Provided 28-190. Document	2w GM1.docx (132.09 KB)	
Current Status	Not Verified	
Action	Approve     Reject     No Action	
Note: Do	cument approval can not be undone.	
Document Category	Uncategorized	~
This document will automation	cally be converted to a pdf file upon approval	
_		
Reason		
		11
	Cancel	Save

Once done, click on [Save]. e-VA will create the case note to include the file as an attachment.

Show: All  Search Q Run Search Has Attachments + Add Ca



If after you have verified the file and find that it is unacceptable, select [Reject]. Add a note for the reason for rejecting the file and click on [Save]. That note will become part of the case note.

Process Received Document/Image	X O
Please process the provided document by either approving or rejecting it. Approval will result in the document being added to the client's document library	
Provided Document	
Wyatt Earp History.docx (11.71 KB)	
Current Status	
Not Verified	
Action Approve Reject No Action	
	h
Cancel 🗎 S	ave

**07/11/2022 6:27:25 PM MDT** - Uncategorized - Proof Rejected Document [Wyatt Earp History.docx] Rejected by George I Martinez I with reason: Client sent the wrong file.

e-VA will also provide you with the option to send the Program Participant a new request for the file.

Notice	Ō X
If you would like to request another document from your client Click thi to open the Request Document Pro Follow Up form. Then complete the as needed. If you do not want to rec another document at this time click	<mark>s link</mark> of form quest
	Ok

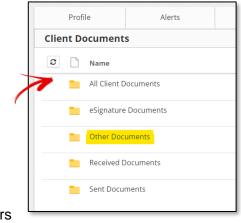


U.S. Department of Veterans Affairs Selecting [No Action] will keep the Processing Process open so that you can complete the process at a later time.

Pr	ocess Received Do	ocument/lma	age			
	Please process the provided document by either approving or rejecting it. Approval will result in the document being added to the client's document library.					
	Provided Wya Document	att Earp History.doo	x (11.71 KB)			
	Current Status	~				
	Action	Approve	O Reject	<ul> <li>No Action</li> </ul>		
					Cancel	

## 8. Deleting a Document from your Program Participant's [Document] Folder

You can delete any document that you have uploaded that exist in your Program Participant's [Other Documents] folder of your Program Participant's [Document] tab.



You cannot delete:

- Documents that have been added by other Counselors
- e-Signed Documents





#### 9. Sending the Program Participant a Document

You can include a document to your Program Participant from the e-VA document library when sending an email, scheduling an appointment, or adding an Assignment.

#### 9.1. Sending the Program Participant a Document via Email

At the [Send Email] page you have two options for attaching / sending files, you can use the [Click to choose or drag and drop file here] or [Choose from Library].

	Send Email to Jane Rodriguez	© ×
	Te george.martines@saraworks.com (Primary)	~
	Cc Subject	0 0
	▶         I         II         5         8         Anal *         14 *         ▲         ■ <th< th=""><th></th></th<>	
	Regards, John Wayne, Vocational Rehabilitation Counselor New Mexico Division of Vocational Rehabilitation Absouergue, Nill 87114 Office Phone: (505) 959-8556	
	Attackments: Click to choose or drag and drop file here Choose from library Share this Case Note with Co-Enrolled and dry	
Attachments:		iscard 🖪 Send
Click to choose or drag and drop file he	re Choose from library	

#### 9.2. Sending the Program Participant a Document via an Appointment

At the [Add Appointment] page you have two options for attaching / sending files, you can use the [Click to choose or drag and drop file here] or [Choose from Library].

omi						
	Attachments will be included on all internal emails and emails sent to the client <b>Attachments:</b>					
	Click to choose or drag and drop file here Choose from library					
	Cancel Next >					



### 9.3. Sending the Program Participant a Document via an Assignment

At the [Add Assignment] page you have two options for attaching / sending files, you can use the [Click to choose or drag and drop file here] or [Choose from Library].

Attachments	Click to choose or drag and drop file here	Choose from library
Cc	Career Counselor	
	Client alternate contact	
	Other	

## 10. How to Send a Document for eSignature

Documents setup for eSignature are created and published (made available for use) by VR&E Service staff who are e-VA Administrators.

The first step is to create the custom file for eSignature. Select [My Profile] from the global navigation menu and then go to your [My Documents] tab. Now click on the [Create Customized eSign file] button. This option allows you to create a customized eSign document from a set of eSigned documents available.

User Information	User Settings / Customization / Signature	Work Settings / Calendar / Out of Office	My Documents	Proxy and Sharing
-				
Create New Word Document		Create Customized eSign File		
C Name	↓≞ Modified	Date 👫 Modified By	↓↑ Size	↓î Tag
🖬 - 10-1045gm ABQ.do	cx.esign 09/29/20	22 11:50:32 AM EDT Martinez I, Georg	e I 2.37 KB	VRE Correspondence - 1246



Search		Document Type: All Docu	iment Types 🕶			
	Document Name	Į1	Size 11	Туре	11	
Select	10-0103-fill.docx.esigr	1	187.26 KB	VAF 10-0103 - 1269	?	۲
Select	28-8606gm.docx.esig	ו	72.76 KB	VAF 28 8606 - 739	?	۲
Select	VBA-26-4555-ARE.doc	x.esign	97.64 KB	VAF 26 4555 - 168	?	

Click on [Select] for the document you want to Customize.

	NOTICE	×	OMB Approved No. 2900-0132 Respondent Burden: 10 minutes Expiration Date: 6/30/2024
Comparison of Veterans     APPLIC     PRIVACY ACT NOTICE: VA will not dis     Act of 1974 or Title 38, CFR 1.576 forro     identified in the VA system of records, and     Vetain benefits. Giving usyour SSN account	You are editing a copy provided document. Al desired changes, savin a copy of it in "My Docu	fter you make any g the file will create	USING OR m what has been authorized under the Privao ingress when requested for statistical purpose ed Hom e Loan Applicant Records, Special exister. Your response is required to obtain o heir SSN under Title 38. OFR 3.309. The V
will not denv an individual benefits for refu prior to January 1, 1975, and still in effect. RESPONDENT BURDEN: We need this i grant. Title 33, U.S.C. 2101(a) or 2101(b) allows us to ask- the information, and complete this form. V2 OMB control numbers can be located on this inform ation on where to send com ments or	OMB Internet Page at <u>www.reg</u> suggestions about this form.	tinfo.gov/public/do/PRAMain	s required by a Federal Statute of law in effect by adapted housing or special home adaptati of 10 minutes to review the instructions, fin a valid OMB control number is displayed. Vali If desired, you can call 1-800-827-1000 to g
		regional office where your	claim file is located or this form can be
completed online by visiting <u>www.eber</u>			2 VA EILE / CLAIM NILIMPER
		OCIAL SECURITY NO.	3. VA FILE /CLAIM NUMBER

e-VA will notify you that you are editing a copy of an agency-provided document. After making your changes, saving the file will create a copy of your customized file in your [My Documents] folder.



When saving the file, you will want to give the custom doc a unique name:

AREYO COL		DD/YYYY) and place)	_	_
FACILIT	ve File as			×
REMARK	File Name	VBA-26-4555-ARE gm.docx		.esign
			Cancel	🖹 Save

You custom eSign doc will now be part of your [My Documents] folder, for use as needed.

	USE	er Information	oser setung	s / Customization / Sig	nature		Calendar / Out of ffice	My Documen		Proxy and Sharing		Login Log
🗟 Cri	eate N	lew Word Document	🏝 Upload File	ද්) Copy Agency File	🕼 Crea	te Customized e	Sign File					
C		Name		14 M	Modified Dat	e 1	Modified By		Size	Tag		
	•	- 10-1045gm ABQ.do	cx.esign	c	9/29/2022	11:50:32 AM EDT	Martinez I, George I		2.37 KB	VRE Correspondence - 124	6	ß
		1045 Willie Colon.doo	x.esign	c	9/29/2022	3:56:15 PM EDT	Martinez I, George I		2.16 KB	VRE Correspondence - 124	6	Ø
		Appendix CY Willie Co	olon.docx.esign	C	9/29/2022	5:46:44 PM EDT	Martinez I, George I		37.76 KB	VRE - General - 749		C2
		Doc for Signature.do	DX	1	0/16/2022	10:39:34 AM EDT	Martinez I, George I		4.67 KB			
	<b>m</b>	VBA-26-4555-ARE gm	.docx.esign	1	0/16/2022	11:03:20 AM EDT	Martinez I, George I		97.73 KB	VAF 26 4555 - 168		ß

Note that eSign documents have a .esign file extension.



To send an eSignature document to a Program Participant begin by going to the Program Participant's [Client Overview] Page and then click on the [Documents] tab. From here you would click on the [Send Document for Signing] button.

🖀 Client Ov	verview - John Sm	ith				Global Client Search	
ge 50	hn Smith • Co-Enrolled Client * No data sharing orge.martinez@saraworks.com 05-999-8556 * Refresh Client Record		Primary Career Counselor: 1 Denver Denver Current Track: 0JT Track Start Date: 05/23/202 State Id: 12				
Profile	Alerts	Communications	Appointments (1)	Assignments (2)	Documents	Case Notes	Reassign / Share
Client Docume	ents					🕼 Send Docu	iment for Signing 🛛 Add File 👻
C Name		11 A	dded Date	Added By	11 Size		
All Clie	ent Documents						
neSigna	ature Documents						
🚞 Other	Documents						
teceiv	ed Documents						

Documents	Ca	se Notes	Reassign / Sh	are / Refer
	~	Send Docu	ment for Signing	Add File 🗸

A window will appear with a list of the eSign Enabled available documents.

Select eSign Enabled Docume	nt				© ×
Search	Source: User Files 🕶	Document Type: All Document Types 💌			
Document Name		Туре			Source
- 10-1045gm ABQ.docx.esign		VRE Correspondence - 1246	?	۲	User
1045 Willie Colon.docx.esign		VRE Correspondence - 1246	?		User



Counselors

Click on the eSign enabled document to select it and e-VA will auto insert the document display the Assignment that will be used to send this document. The Counselor can schedule a date for the eSign document to be sent or they can send the Assignment out immediately by using the blue action buttons in the lower right corner of the page.

Send Document for     Bitum to Clinit Overview - Documents     John Smith     Co-Enrolled Client     X to data sharing     goggemetrice@barwor     505-999-8556	Primary Careel Deriver Deriver	r Counselor: George I Martinez I r 0JT			Default SM:	5 Message Regarding	SMS Message Hi John-massage from George I Martine I regarding a request for your electronic s not working? Bespond with T for Test a request for your electronic signature	ignature, Click here to respond. Link
Name	John Smith							
Email	george.martinez@saraworks.com (P	rimary)	~	Edit			Email Message	
Cell	505-999-8556 (Primary)		~	Edit	Subject	WIOA DEM	MO is requesting your electronic signature	8
Send Date	6/09/2022				Salutation	Hijohn,		8
Send on Specific Day	No Y				Body		B / U S # Anal+ 14+ A + II II E + co	
Language	English			~			B I U B B AM I IV A I E E EV G	into the simples process
File Name Document Type Description	- Application Acknowledgement VR22	<b>ent to Sign</b> .doox nent form that the client must sign, it has been	set up for eSignature.			private lin	nk.	
					_			
					Closing Signature	New Mexico Albuquerqu	e, Vocational Rehabilization Counselor o Division of Vocational Rehabilization ue, NM 87114 nee (500) 999-8559	0
							Cancel Schedule for S	Sending send Document Now
Cancel	🖺 Sche	dule for Sendir	ng 🖪	Sen	d Docun	nent	t Now	

Once the document has been scheduled or sent, e-VA will document the event as a case note.

<b>06/08/2022 2:32:20 PM PDT</b> - Assignments - SARA Note SARA sent notification regarding assignment - "Electronic Signature Delivery" to the following:
John Smith - george.martinez@saraworks.com - Success John Smith - 5059998556 - Success
<b>06/08/2022 2:32:19 PM PDT</b> - Assignments - SARA Note Assignment "Electronic Signature Delivery" added by George I Martinez I

Only a e-VA Admin Level staff can set up a document for eSignature



PLEASE

NOTE

eSignature documents can only be sent using the [Send Document for Signing] functionality



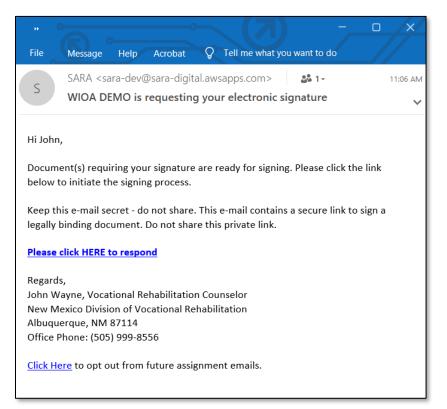
# 11. How the Program Participant Signs a Document for eSignature

Once the request for eSignature has been sent by the Counselor, the Program Participant will receive an email and text notification of the request.

Here is an example of what the text notification would look like:

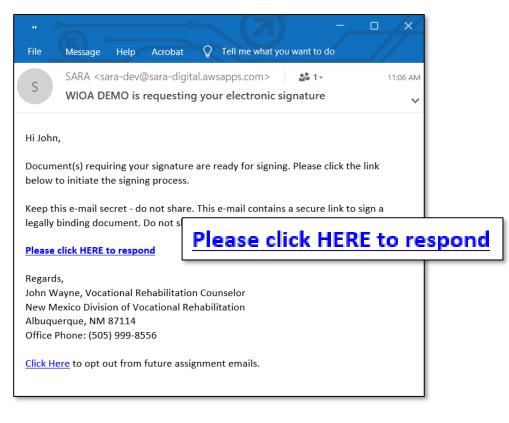
8	+1 833-481-2337
	Hi John- message from George I Martinez I regarding a request for your electronic signature. Click <u>https://1tc.us/?F2vCpp</u> to respond. Link not working? Respond with T for Text

Here is an example of what the email notification would look like:



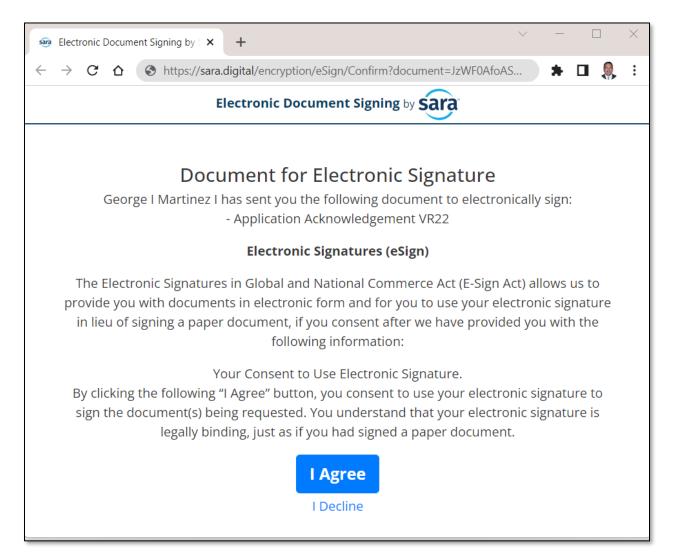


U.S. Department of Veterans Affairs The Program Participant would click on the link in the email or text to access the document for eSignature.





This will transport them to the [Document for eSignature] web page:



The Program Participant clicks on the [I Agree] button and e-VA will display the Document and instructions for how to eSign the document.



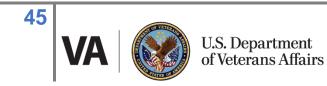
	Electronic Document Signing by Sara
George I Ma	artinez I asked you to review and sign this document. To start the process of signing this document, please click 'Next'.           NEXT           or         I DECLINE SIGNING
	□ 100% × ⊙ ⊙ ④ 53 日日
	SIGN HERE Create New File Here.
AGE 1 OF 1	100% a - Application Acknowledgement VR22.d

Here the Program Participant will click on the [X] or the [Next] button to created their eSignature.

e-VA will then instruct the Program Participant to set up their eSignature.

$\leftarrow$ $\rightarrow$ <b>C</b> $\triangle$ $(a = dev.sara.digital/encryptio$	on/esian/siandocument/?do	cument=J IP	2 🕁			
	n, esign, signaceament, rac		-			>
Setup your Signature						•
Full Name		Initials				
John Smith		JS				
DRAW YOUR SIGNATURE					Restore	•
By clicking 'Setup and Sign', I confirm that the signature is the electr including legally binding contracts - just the same as a wet lnk signa	ronic representation of my signature sture or initial.	for all purposes wh	en I use ti	hem on d	locuments,	
By clicking 'Setup and Sign', I confirm that the signature is the electr including legally binding contracts - just the same as a wet ink signa SETUP AND SIGN CANCEL	ronic representation of my signature ature or initial.	for all purposes wh	en I use ti	hem on d	documents,	
including legally binding contracts - just the same as a wet ink signal	ronic representation of my signature ature or initial.	for all purposes wh	en I use ti	hem on d	documents,	
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including legally binding contracts - just the same as a wet ink signal	ronic representation of my signature ature or initial.	for all purposes wh	en I use ti	hem on d	locuments,	
including legally binding contracts - just the same as a wet ink signal	ronic representation of my signature ature or initial.	for all purposes wh	en I use ti	hem on d	locuments,	

Once the Program Participant has created their eSignature, they would click on the [SETUP AND SIGN] yellow button.



Setup your Signature	
Full Name	Initials
John Smith DRAW YOUR SIGNATURE	JS
Jehne	July -

This takes the Program Participant back to the document for signature. The Program Participant clicks on the X in the yellow box to add their eSignature.

Electronic Document Signing by Sara	ľ
Please confirm your signature by clicking the yellow sign or IDECLINE SIGNING	ature areas.
Please acknowledge that you have reviewed this form	



e-VA will then display confirmation that the signing is complete and prompt the Program Participant to submit the document.

🧐 Please Sign - Appli	ication Acknow × +	_		$\times$
$\leftrightarrow$ $\rightarrow$ C $\triangle$	S https://sara.digital/encryption/esign/signdocument/?document=JzWF0	*	•	:
	Electronic Document Signing by Sara			
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PAGE 1 OF 1	100% 🔒 - Application Acknowledgeme	nt VR2	2.docx	

Once the eSigned document has been submitted, e-VA will display a confirmation message and will provide the Program Participant the option to download the eSigned document.





# **12. How the Counselor Receives the eSigned Document**

In e-VA, the Counselor is notified that the Program Participant has sent an eSigned document by displaying a Purple Alert.

Clie	ent Overv	view - John S	Smith					Global Client Search		
Upload P	× No george. 505-999	nrolled Client data sharing martinez@saraworks	.com		Primary Career Counselor: C Denver Denver Current Track: OJT Track Start Date: 05/23/2027 State Id: 12					
P	rofile	Alerts (1)	Commi	unications	Appointments (1)	Assignments	Documents	Case Notes	Reassign / Share	
evel	11 Date		L Viewed	11 Excerpt						
	06/09/2022	12:46:33 PM MDT	New	Client electron	nically signed requested document (- Application Acknowledgement VR22.docx). Document					
O5/27/2022 11:54 PM MDT     O5/27/2022 Subject: Here is					ere is the File Counselor					
	05/27/2022	2:33:41 PM N. 7	06/01/2022	Email address	eorge.martinez@saraworks.com listed for this client is not valid.					
Γ	Level	11	Date			Viewed	.↓†	Excerpt		
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	E		06/09/202	22 12:46:	33 PM MDT	N	ew	Client electr	onically sign	

To view the eSigned document the Counselor would click on the Purple Alert to expand and view the details. From here the Counselor can preview or download the eSigned document.

Profile	Alerts	Communicat	tions	Appoin	itments (1)	Assignments	Documents	Case Notes	Reassign / Share	
Level 🕼	Date	1±	Viewed	ļ†	Excerpt					
	06/09/2022 12:46:3	3 PM MDT	06/10/	/2022	Client electro VR22.docx). [	onically signed requested Document		Ū		
Client electro client Docum Attachment(s	<ul> <li>✓ Mark as New Wew Document Status</li> <li>✓ Client electronically signed requested document (- Application Acknowledgement VR22.docx). Document [- Application Acknowledgement VR22 (signed).pdf] added to client Document Library (eSignature Documents\Decision Letter)</li> <li>✓ Attachment(s): - Application Acknowledgement VR22 (signed).pdf (528.71 KB) </li> <li>✓ Ease Notes for Electronic Signature Delivery</li> </ul>									
Attach	ment(s): -	Application	on Ac	:know	ledgen	nent VR22 (s	signed).pdf	(528.71	KB) 👁 📥	
Case N	lotes for E	lectronic S	Signat	ure D	elivery					



U.S. Department of Veterans Affairs e-VA will also document as a case note (shown below), that the eSigned document has been received.

#### 66/09/2022 12:46:33 PM MDT - Assignments - Document Signed

Client electronically signed requested document (- Application Acknowledgement VR22.docx). Document [- Application Acknowledgement VR22 (signed).pdf] added to client Document Library (eSignature Documents\Decision Letter) Attachment(s): - Application Acknowledgement VR22 (signed).pdf (528.71 KB) ()



U.S. Department of Veterans Affairs