e-VA

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

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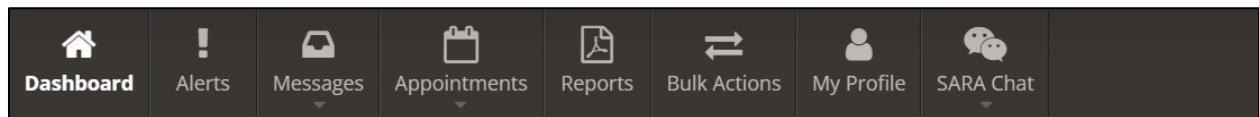
Then click on the [My Documents] tab to access your document folder.

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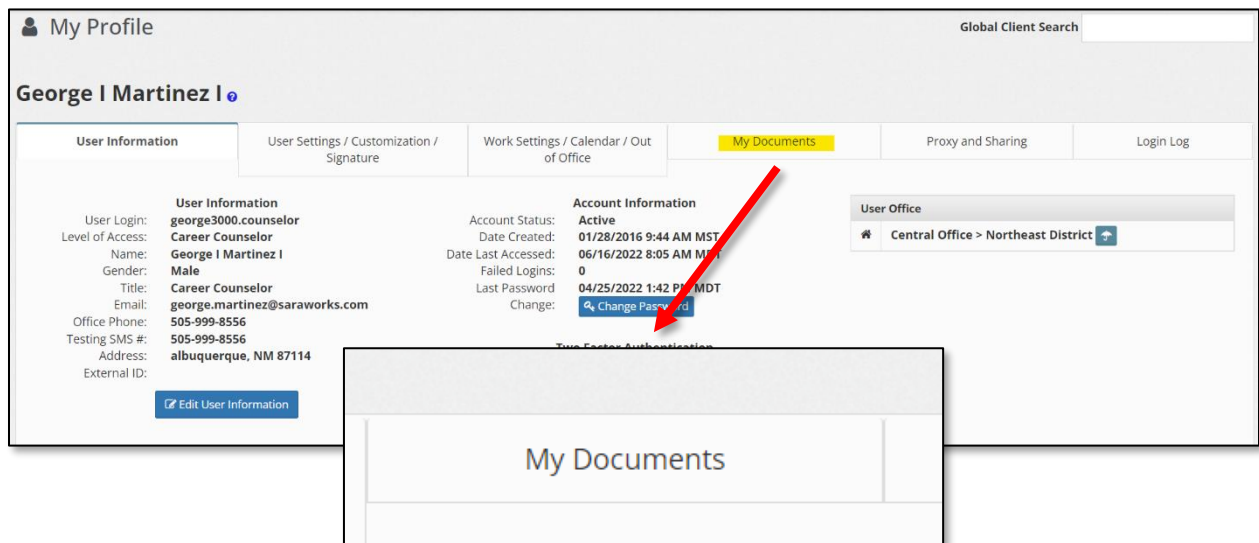
The [My Document] tab provides you with a place to store and maintain your documents for use with e-VA and your Program Participants.

2.1. Adding a Document to the Document Management Center
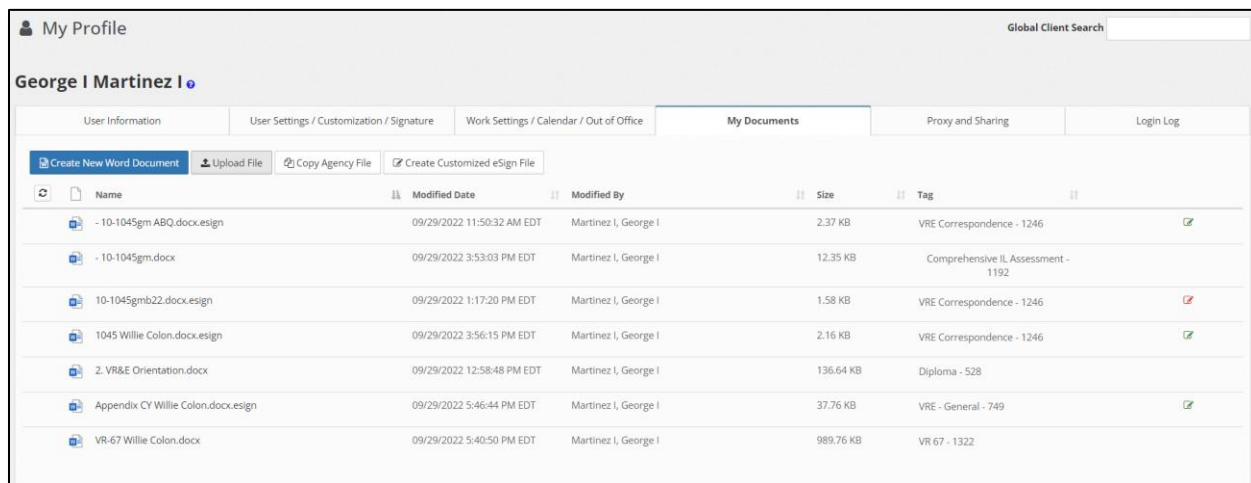You have several options for adding a document, you can:

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

PLEASE NOTE 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.

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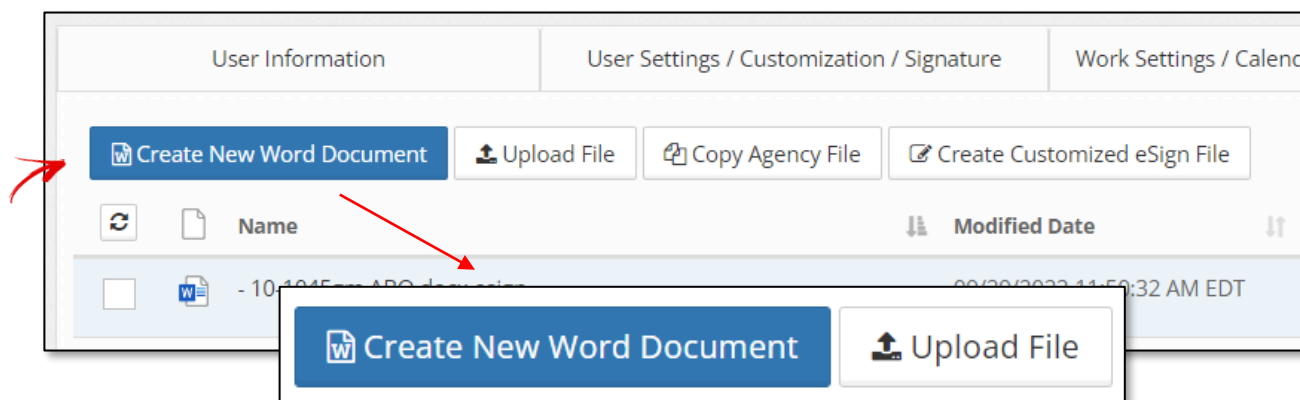
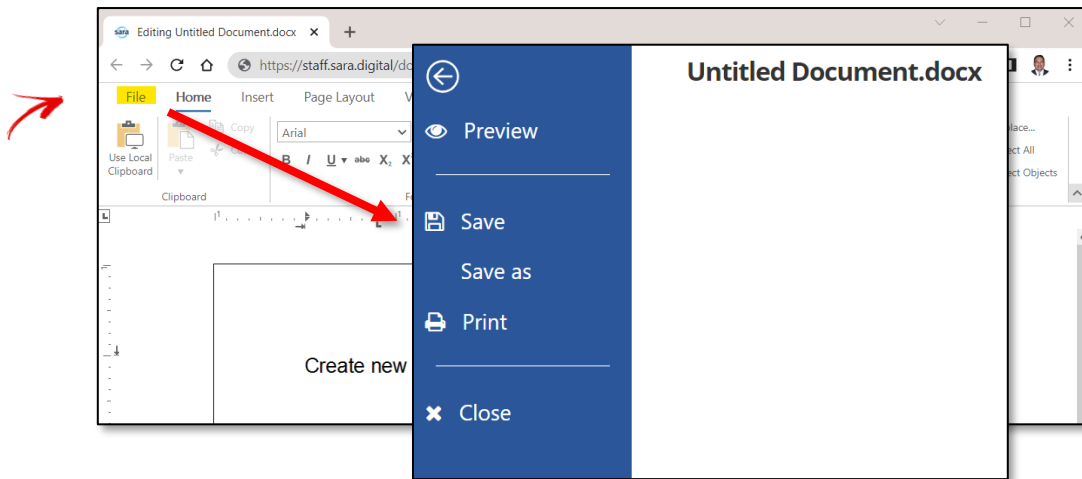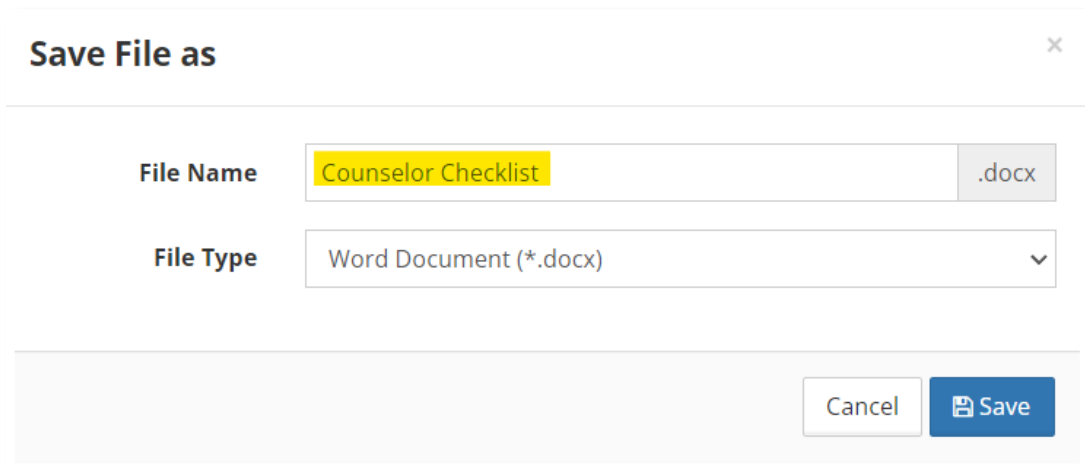Once you have created your new document, click on [File] and then select [Save] or [Save As].
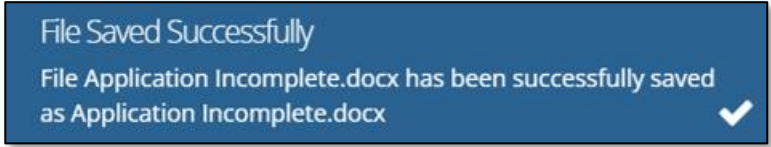

 You can save your new document as a Word Document or a PDF.
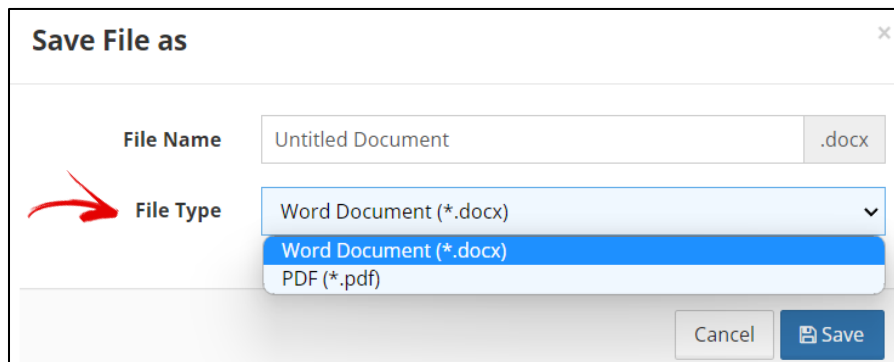
Give your file a name and then click on the [Save] button.

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 ✔
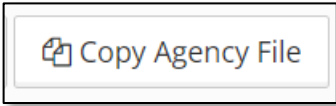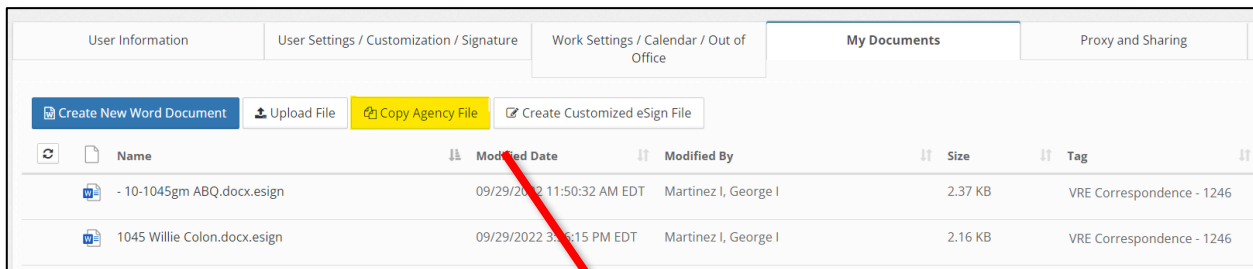
2.1.2. [Upload File] Option
This option allows you to select and upload a file from your local device.
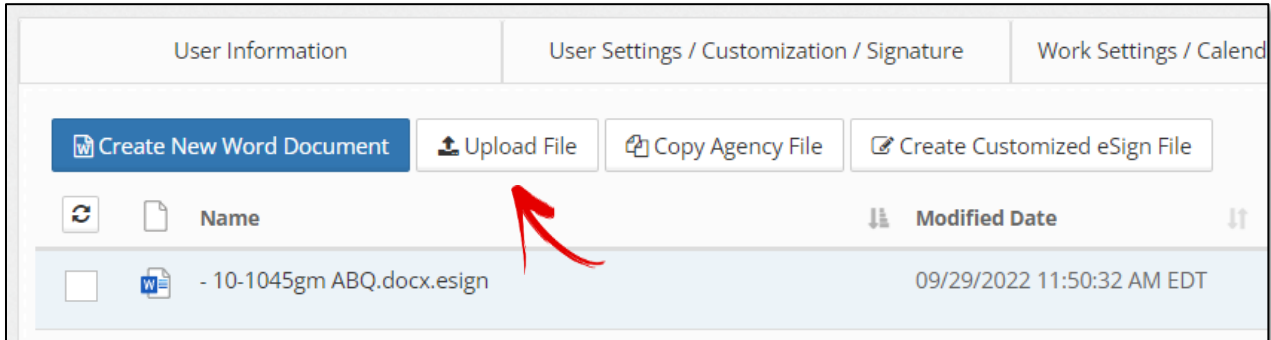
2.1.3. [Copy Agency Fil] Option
You can copy a file that has been Published (made available by a higher office level at your
agency) by using the [Copy Agency File] function.

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

Create a Copy of an Agency Document

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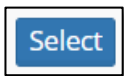
   Allows you to create a copy of the document for your [My Documents] folder

   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.

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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.

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

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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:

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

Note that eSign documents have a .esign file extension.

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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.
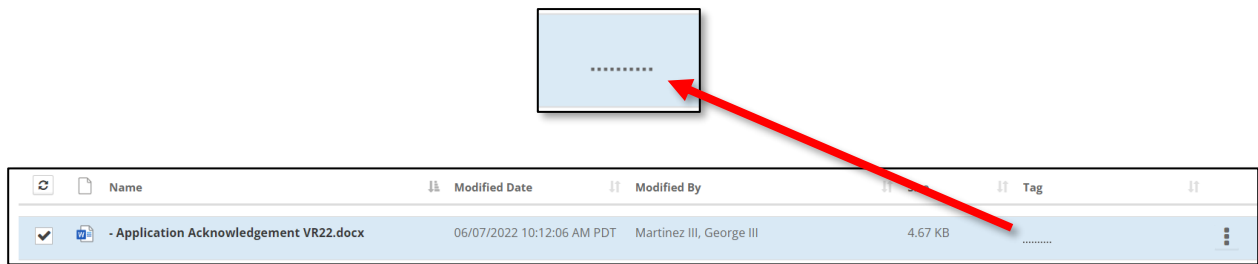
The Set Document Tag window will appear. Use the drop-down menu to select your Tag. Then click on the [Save] button to set the Tag.
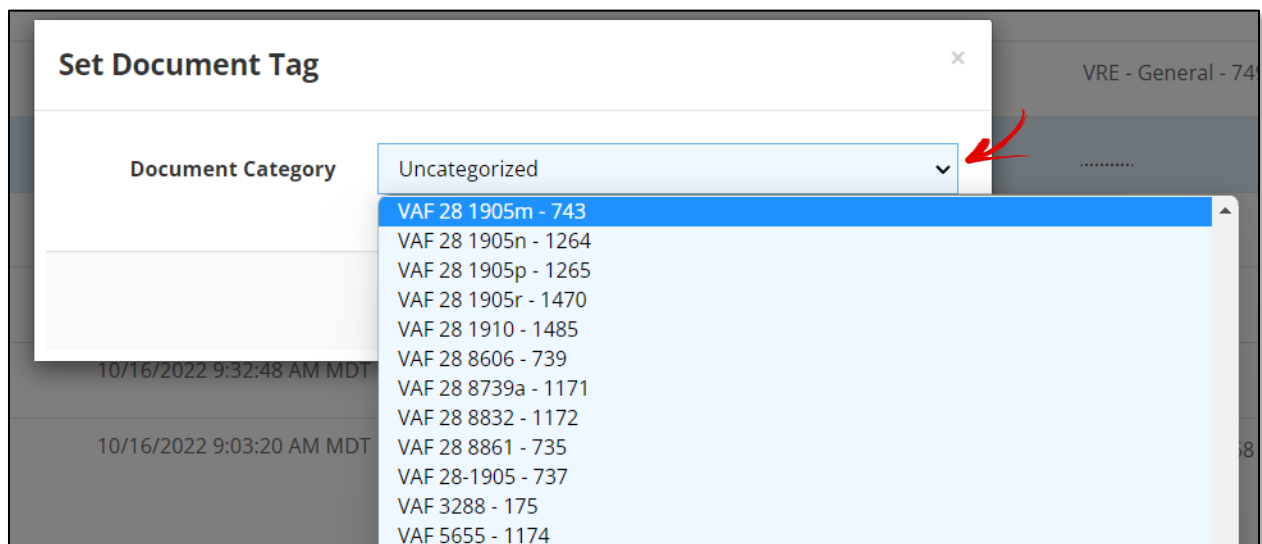
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To change the already set Tag, click on the Tag name and the [Set Document Tag] window will appear. Here you can set a different Tag for the document.

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.
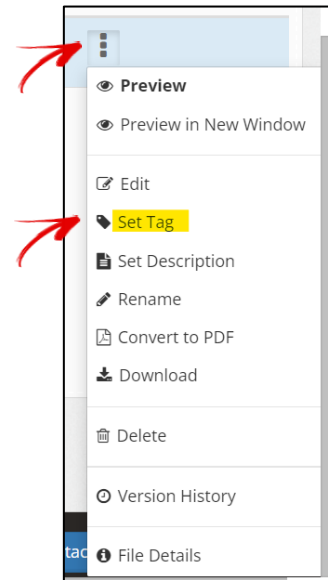
2.3. Previewing a Document

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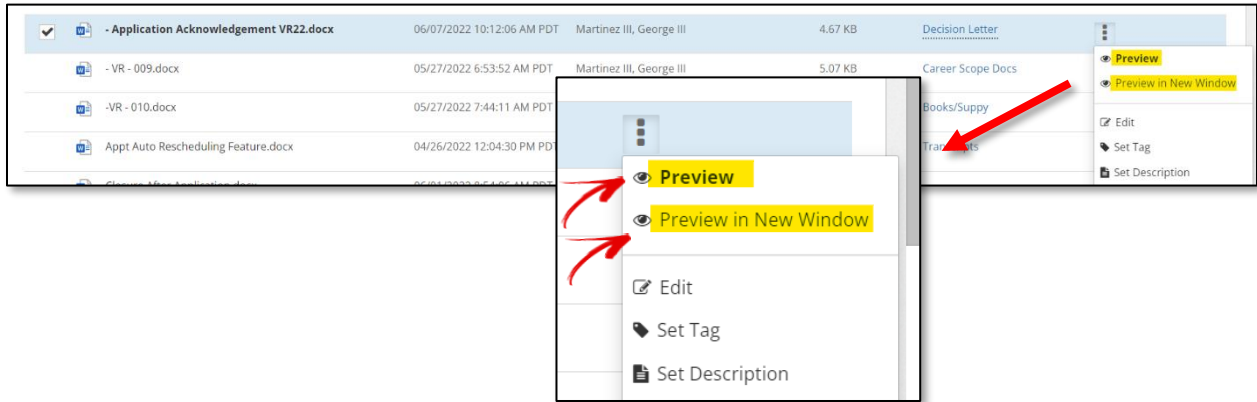
The preview has several options such as zoom, search, and print capabilities.

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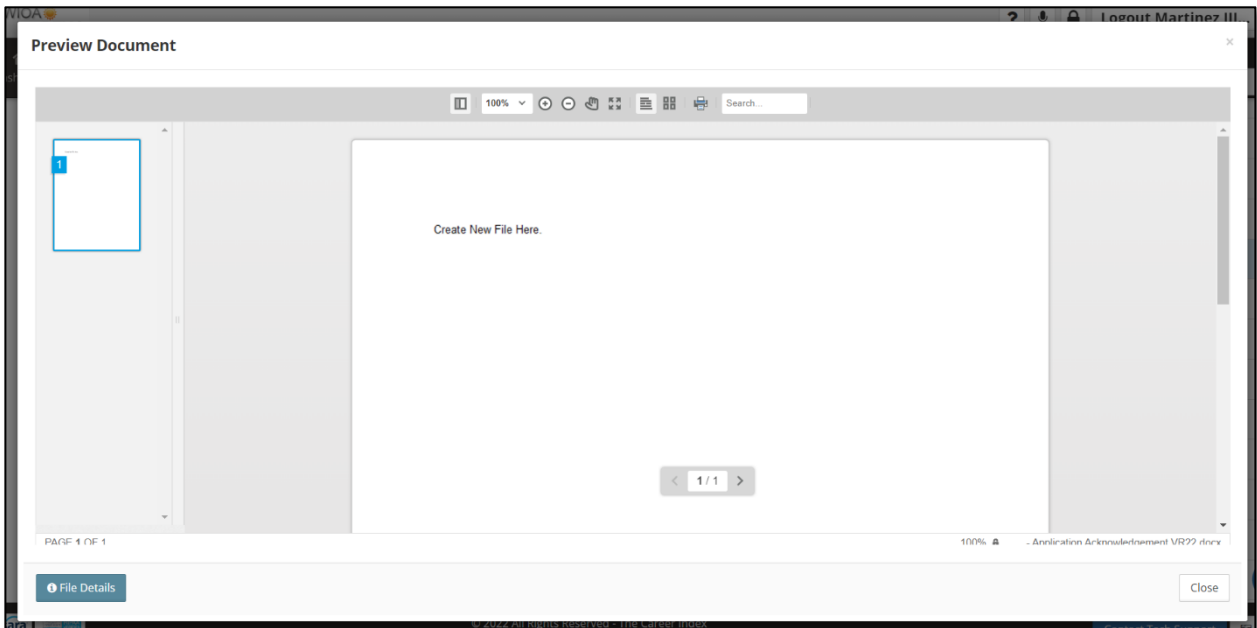
2.4. Editing a Document

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.
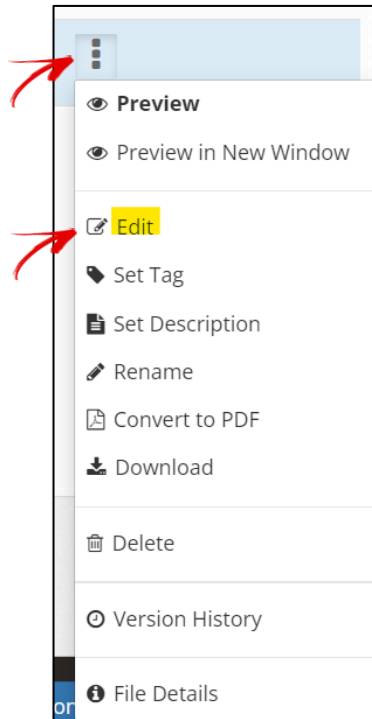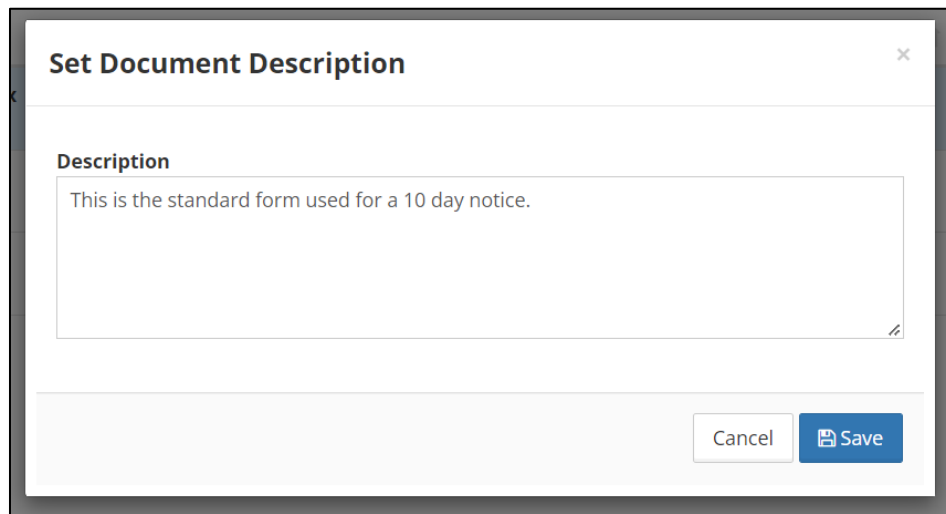
2.5. Setting a Description for your Document

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

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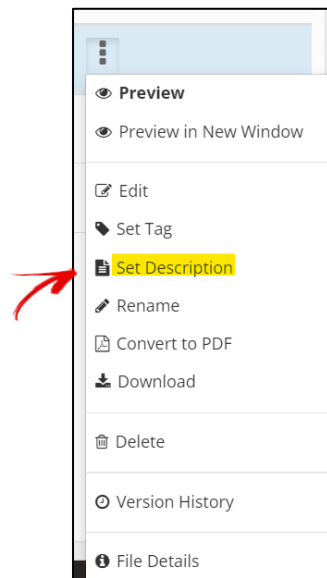
This feature allows you to add a description of the document that will be helpful for other e-VA Counselors. When you select this option a [Set Document Description] window appears. Simply add your description and click on [Save].
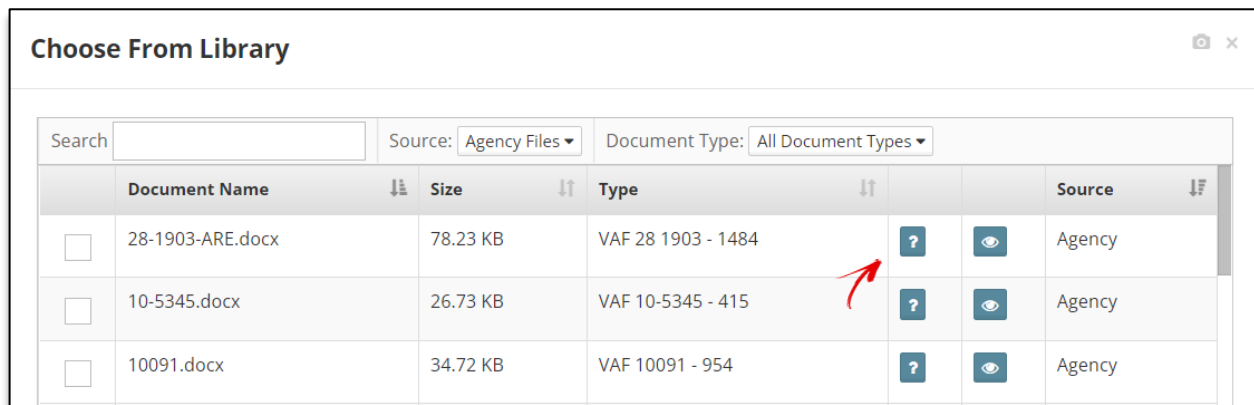
Set Document Description   ✕

Description

This is the standard form used for a 10 day notice.

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.

Choose From Library   📷 ✕

Search [   ]   Source: [Agency Files ▾]   Document Type: [All Document Types ▾]

	Document Name	Size	Type			Source
☐	28-1903-ARE.docx	78.23 KB	VAF 28 1903 - 1484	?	👁	Agency
☐	10-5345.docx	26.73 KB	VAF 10-5345 - 415	?	👁	Agency
☐	10091.docx	34.72 KB	VAF 10091 - 954	?	👁	Agency

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

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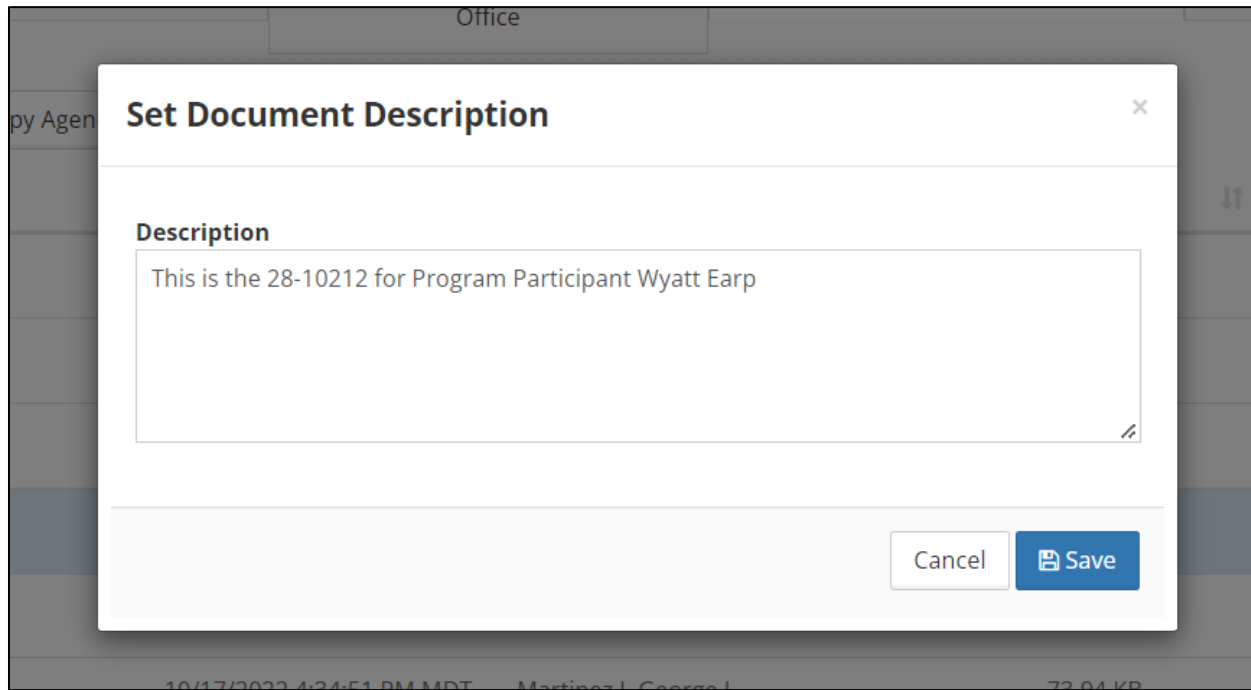
2.6. Renaming your Document

You can rename your document by selecting [Rename] from the *more options* icon, the three vertical dots.
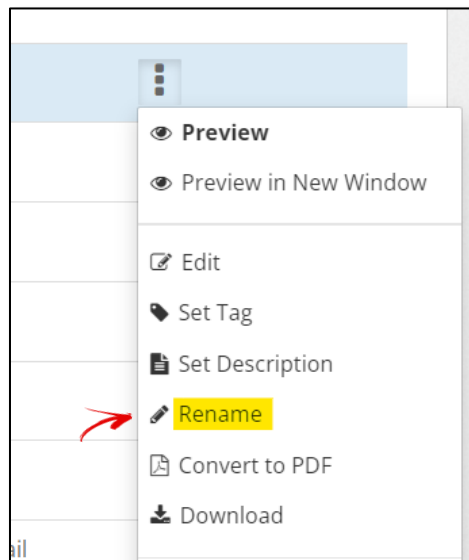
The [Rename File] window appears. Rename your document and click on [Save] to save your changes.

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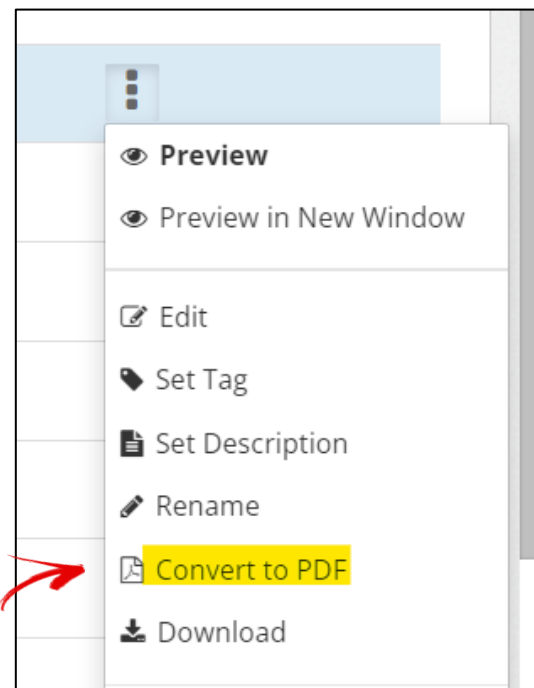
e-VA will convert the file to a PDF and place it in the same folder of the original file. e-VA will also display a confirmation message once complete.

File Converted Successfully

File - VR28 Acknowledgement.pdf has been successfully converted to pdf as - VR28 Acknowledgement.pdf ✔

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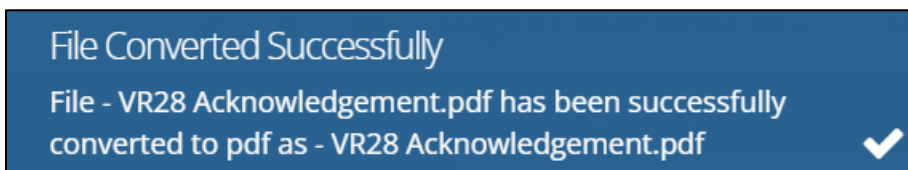
2.8. Download a Document

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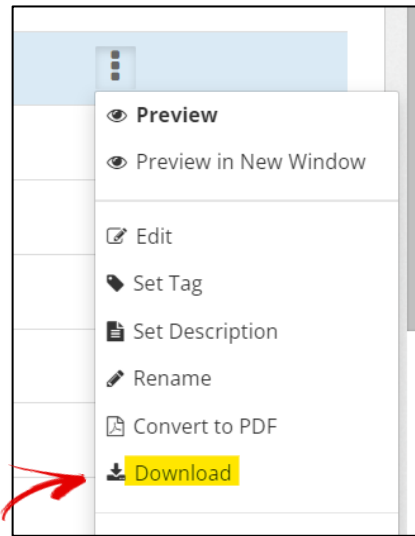
2.9. Deleting a Document

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

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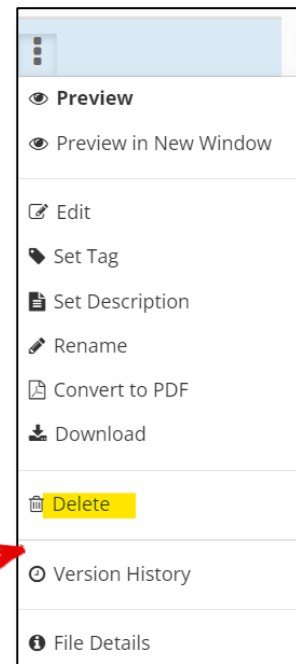
You can also delete a document by placing a check mark by the document and clicking on the [Delete] button in the table header section.
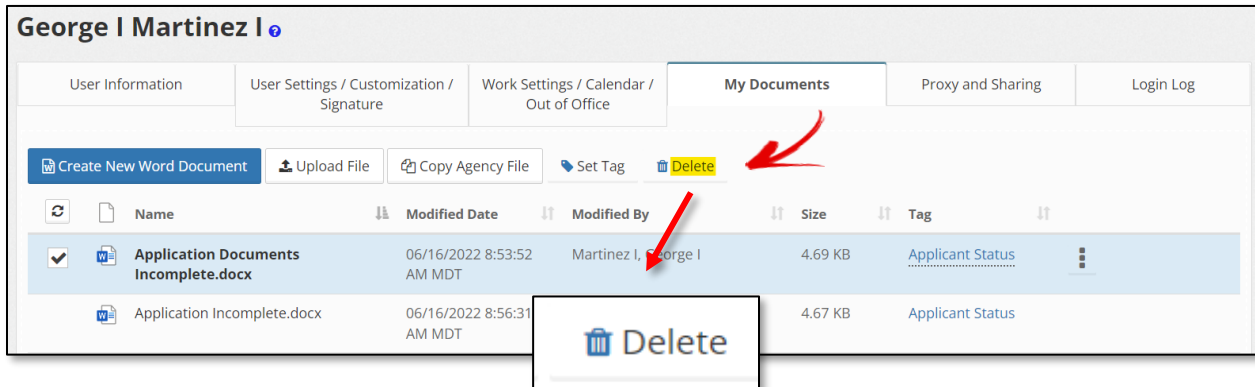
2.10. Document Version History

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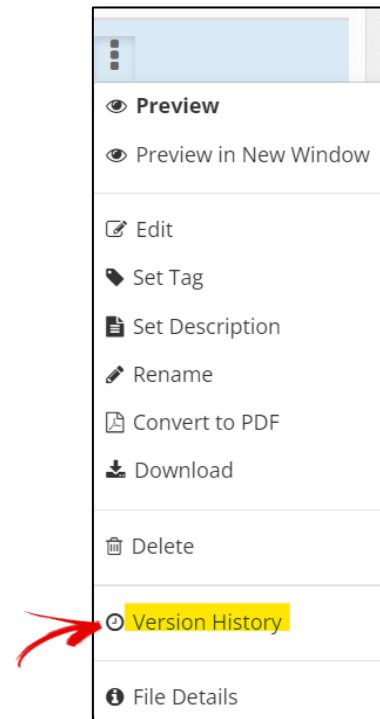
Version history allows you to see when and by who edits were made to the document. You can download the document or restore the document to its previous version by selecting either [Download], or [Restore to this Version] from the *more options* icon, the three vertical dots, applicable.

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.

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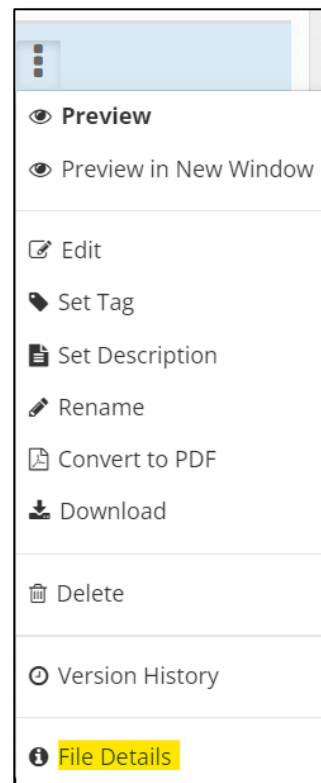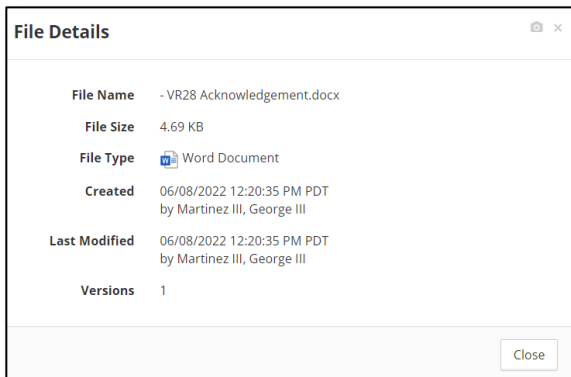
3. Processing Incoming Documents from Your Program Participants

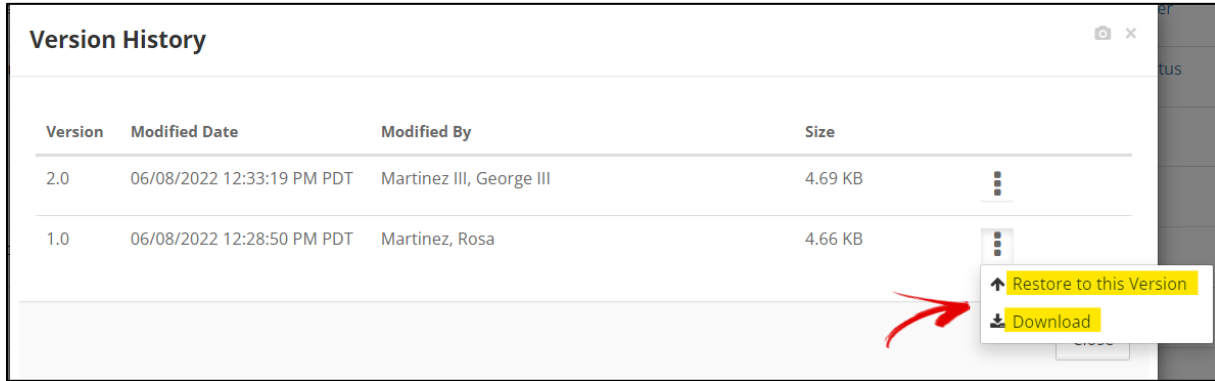All incoming documents/files are now vetted by the Counselor before the document/file can become part of the case note. This includes unsolicited documents/files as well as the Program Participant returning a document/file that you sent them.

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.

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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.

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.

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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

Cancel

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 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   28-1902w GM1.docx (132.09 KB)

Current Status   Not Verified

Action   (●) Approve   ( ) Reject   ( ) No Action
Note: Document approval can not be undone.

Document Category   Uncategorized

This document will automatically be converted to a pdf file upon approval

Reason

Cancel   💾 Save

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

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.

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

Notice

If you would like to request another document from your client Click this link to open the Request Document Proof Follow Up form. Then complete the form as needed. If you do not want to request another document at this time click [Ok].

Ok

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

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

Cancel

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4. The Program Participant's Documents Folder

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

PLEASE NOTE All Program Participant Folders are organized the same way. These folders cannot be edited or deleted nor can you add any new folders.
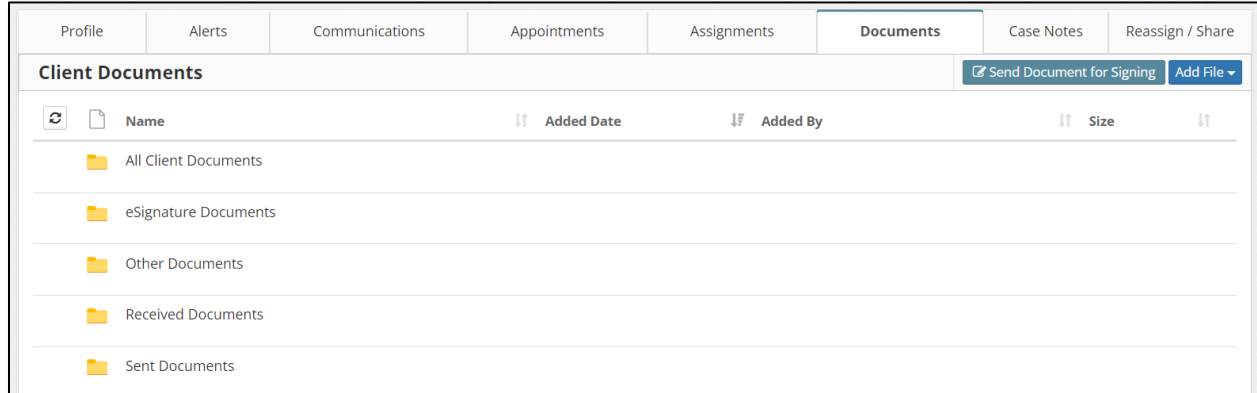
5. Navigating your Document Folders

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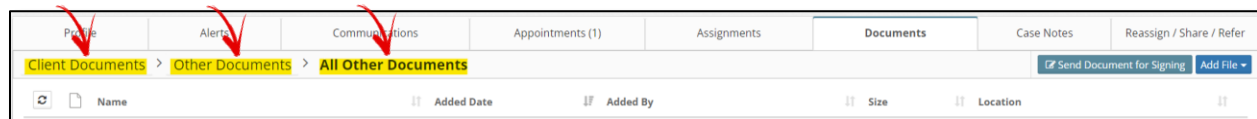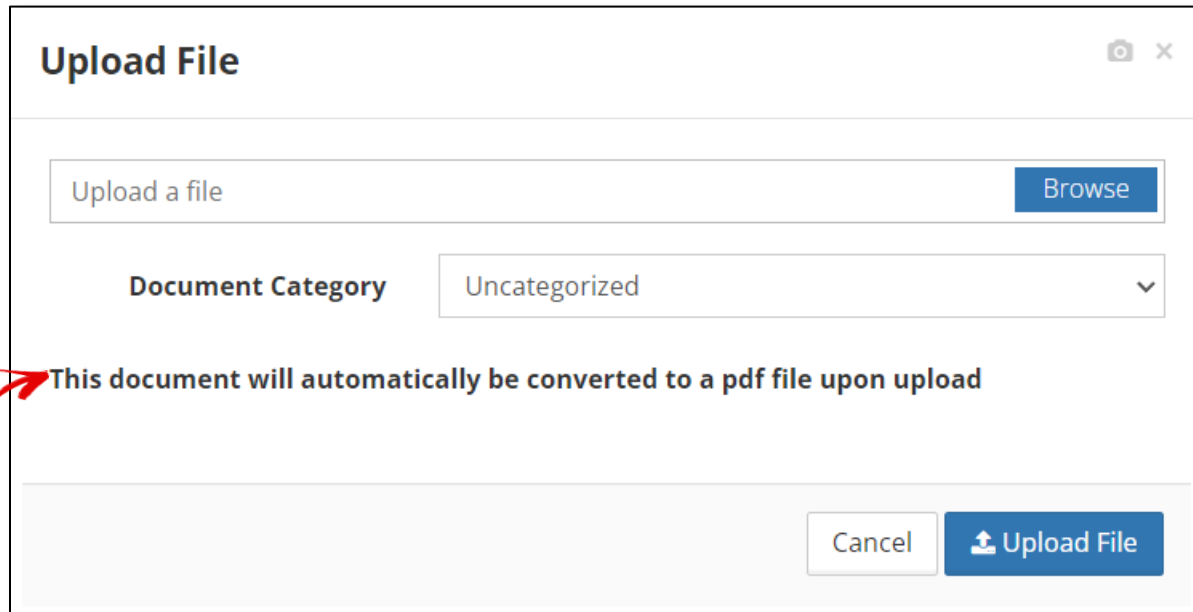
6. Adding a Document to the Program Participant's Document Folder

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

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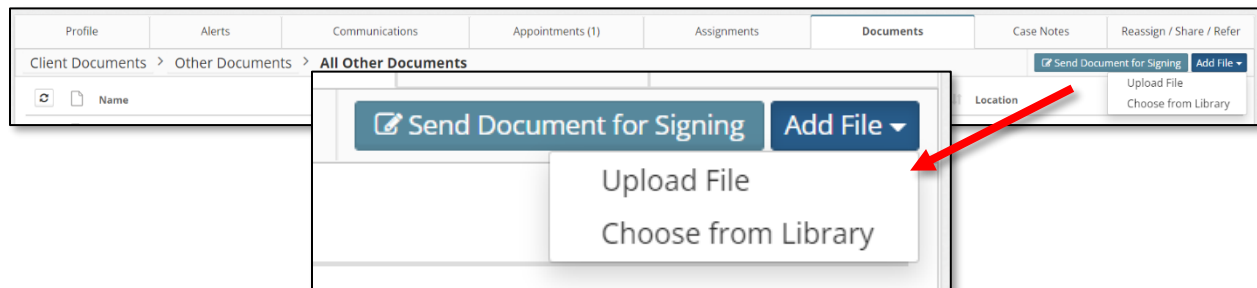
6.1. Adding a Document – Upload File Option

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

Note that the file will automatically be converted t**o 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.
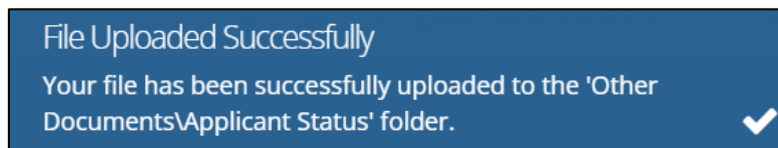
6.2. Adding a Document – Choose from Library Option

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

Choose From Library

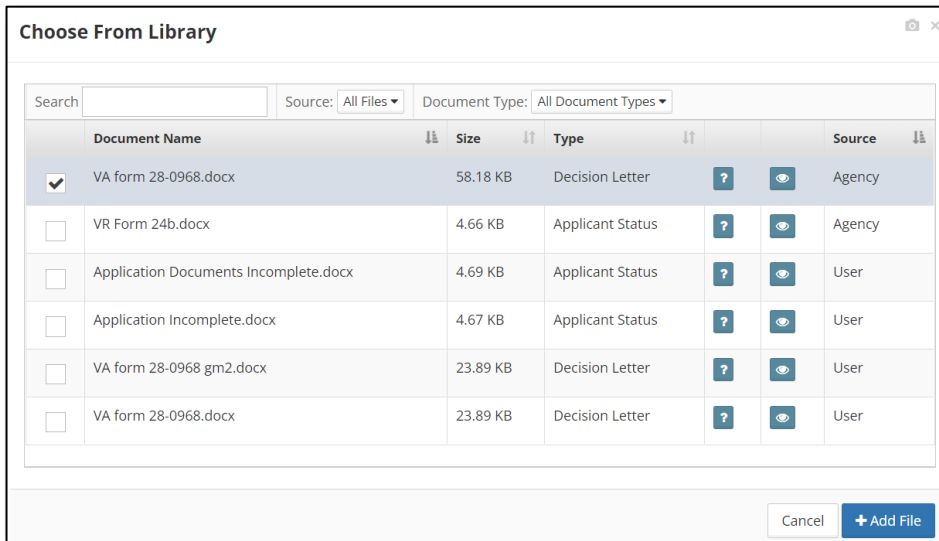| Document Name	Size	Type			Source
☑ VA form 28-0968.docx	58.18 KB	Decision Letter	?	👁	Agency
☐ VR Form 24b.docx	4.66 KB	Applicant Status	?	👁	Agency
☐ Application Documents Incomplete.docx	4.69 KB	Applicant Status	?	👁	User
☐ Application Incomplete.docx	4.67 KB	Applicant Status	?	👁	User
☐ VA form 28-0968 gm2.docx	23.89 KB	Decision Letter	?	👁	User
☐ VA form 28-0968.docx	23.89 KB	Decision Letter	?	👁	User

Search ___ Source: All Files ▾ Document Type: All Document Types ▾

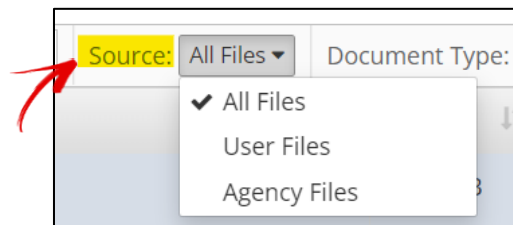Cancel   **+ Add File**

? 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.

Source: All Files ▾ Document Type:
✔ All Files
User Files
Agency Files

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

Document Type:	All Document Types ▾
	VAF 21 22 - 295
Type	VAF 21 22a
	VAF 21 4193 - 1460
VAF 21 0304 -	VAF 21-674b - 143
	VAF 22 5490 - 1179
Uncategorized	VAF 22 8690
	VAF 22 8691 - 1472
Uncategorized	VAF 22 8794 - 1267

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.

Client Overview - Wyatt Earp

Wyatt Earp
george.martinez@saraworks.com
505-999-8556

Primary Career Counselor: George I Martinez I
State Denver
Current Track: Training
Track Start Date: 07/06/2022 ⇄ Change Track

Global Client Search

Upload Picture   ↻ Refresh Client Record

Profile	Alerts (2)	Communications	Appointments	Assignments (4)	Documents	Case Notes	Reassign / Share / Refer

Level	Date	Viewed	Excerpt	
🖼	07/11/2022 4:57:19 PM MDT	New	Document received via Email. Please process for verification.	❯
⊙	07/11/2022 4:57:18 PM MDT	New	Subject: File for My Records	❯

Profile	Alerts (2)	Communications	Appointments	Assignments (4)	Documents	Case Notes	Reassign / Share / Refer

Level	Date	Viewed	Excerpt	
🖼	07/11/2022 4:57:19 PM MDT	New	Document received via Email. Please process for verification.	❯
⊙	07/11/2022 4:57:18 PM MDT	New	Subject: File for My Records	❯

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e-VA Document Management Center for Counselors

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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.

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

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 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 28-1902w GM1.docx (132.09 KB)

Current Status Not Verified

Action ● Approve ○ Reject ○ No Action

Note: Document approval can not be undone.

Document Category Uncategorized

This document will automatically be converted to a pdf file upon approval

Reason

Cancel 🖫 Save

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

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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.

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.

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.
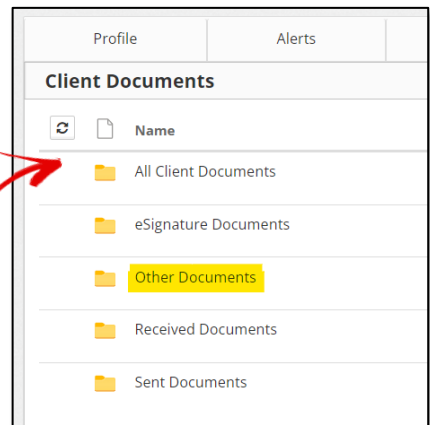
PLEASE NOTE You cannot delete:

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

⚠ It is Important to note that deleted files cannot be recovered.

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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].

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].

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].
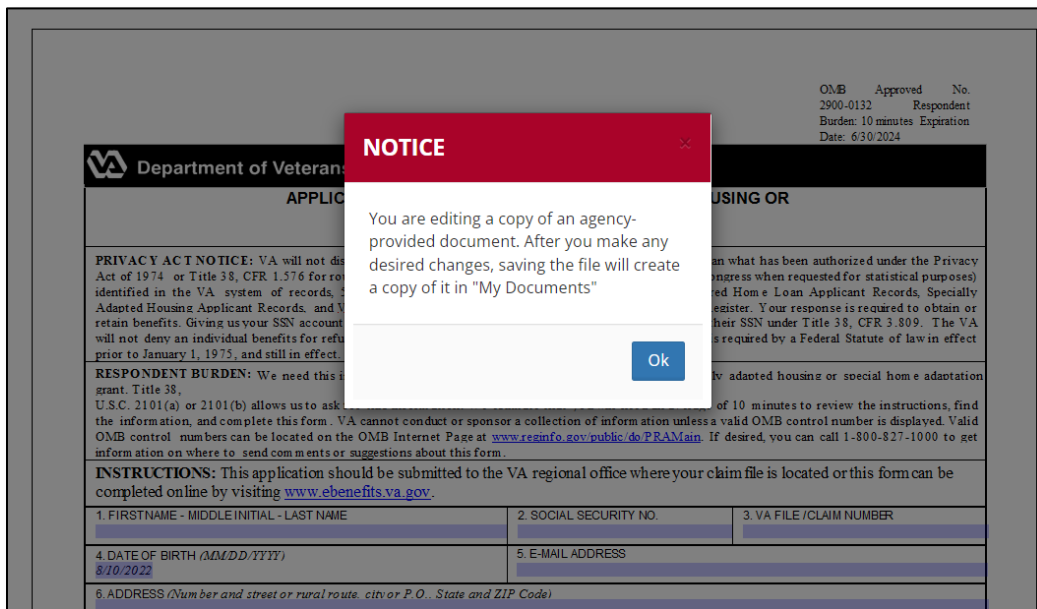

10. How to Send a Document for eSignature

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.

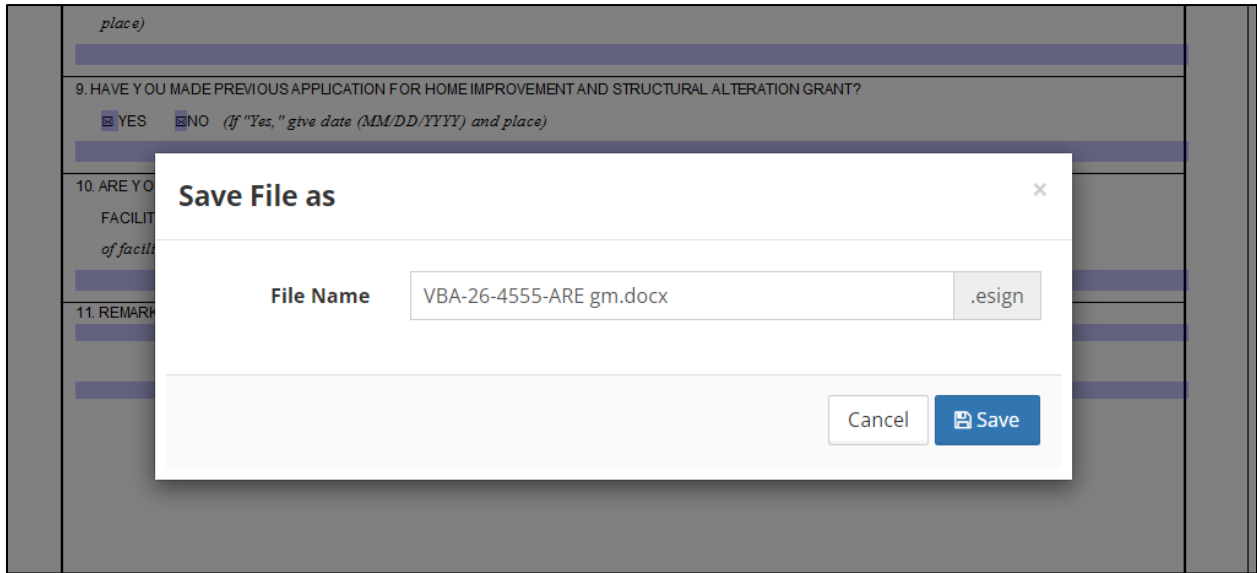VA | U.S. Department of Veterans Affairs
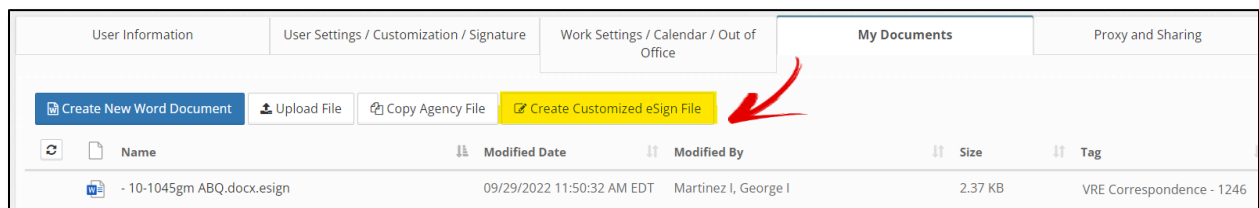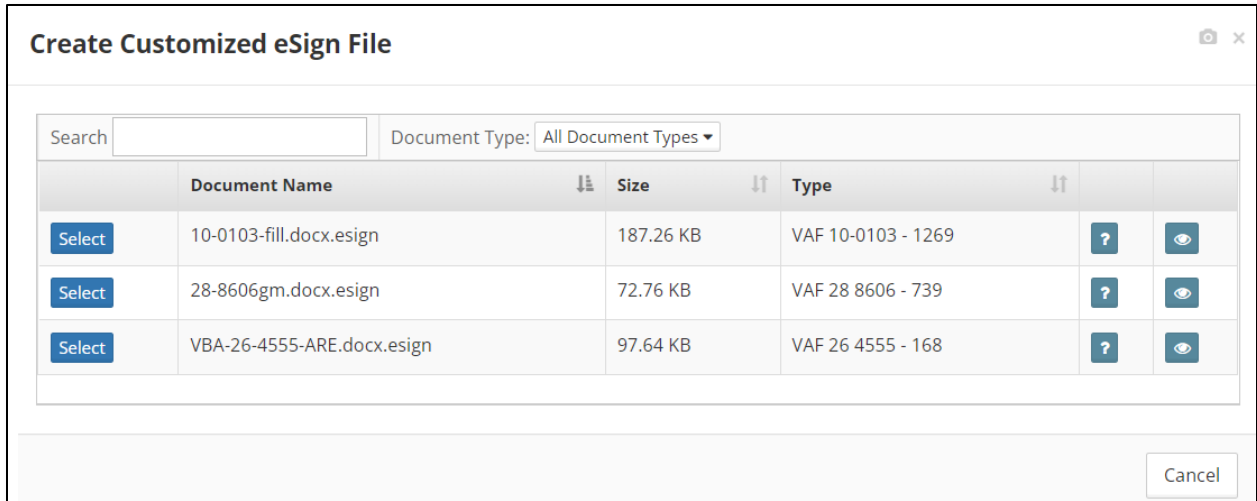
Click on [Select] for the document you want to Customize.

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.

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

Save File as   ✕

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.

| User Information | User Settings / Customization / Signature | Work Settings / Calendar / Out of Office | **My Documents** | Proxy and Sharing | Login Log |

🖫 Create New Word Document   ⬆ Upload File   🗐 Copy Agency File   ☑ Create Customized eSign File

	Name	Modified Date	Modified By	Size	Tag	
🗎	- 10-1045gm ABQ.docx.esign	09/29/2022 11:50:32 AM EDT	Martinez I, George I	2.37 KB	VRE Correspondence - 1246	☑
🗎	1045 Willie Colon.docx.esign	09/29/2022 3:56:15 PM EDT	Martinez I, George I	2.16 KB	VRE Correspondence - 1246	☑
🗎	Appendix CY Willie Colon.docx.esign	09/29/2022 5:46:44 PM EDT	Martinez I, George I	37.76 KB	VRE - General - 749	☑
🗎	Doc for Signature.docx	10/16/2022 10:39:34 AM EDT	Martinez I, George I	4.67 KB		
🗎	VBA-26-4555-ARE gm.docx.esign	10/16/2022 11:03:20 AM EDT	Martinez I, George I	97.73 KB	VAF 26 4555 - 168	☑

Note that eSign documents have a .esign file extension.

📄 VBA-26-4555-ARE gm.docx.esign

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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.

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

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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.

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

PLEASE NOTE 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
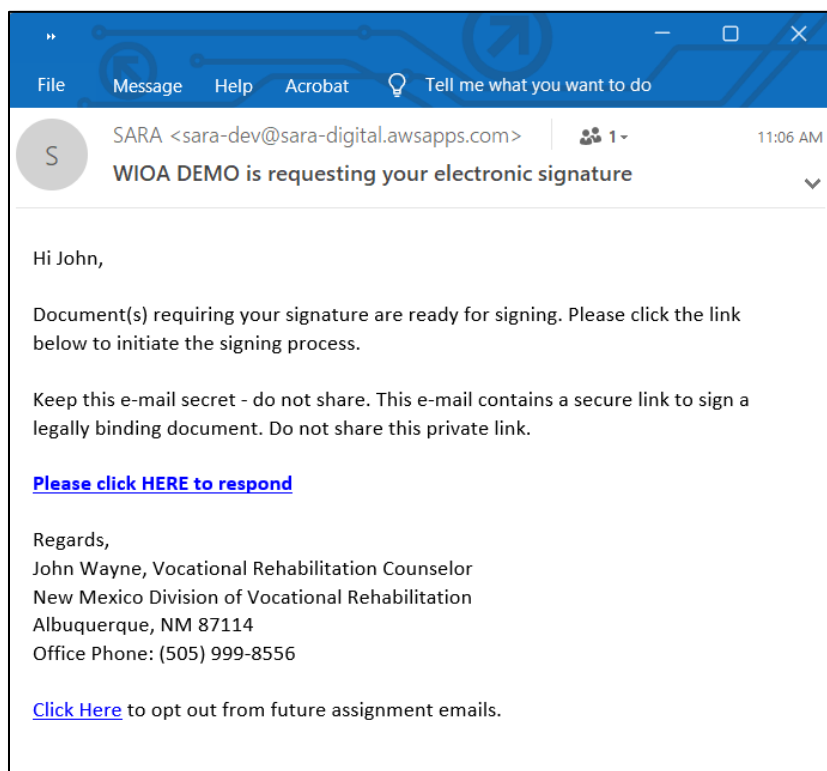
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11. How the Program Participant Signs a Document for eSignature

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:

+1 833-481-2337

Hi John- message from George I Martinez I regarding a request for your electronic signature. Click https://1tc.us/?F2vCpp to respond. Link not working? Respond with T for Text
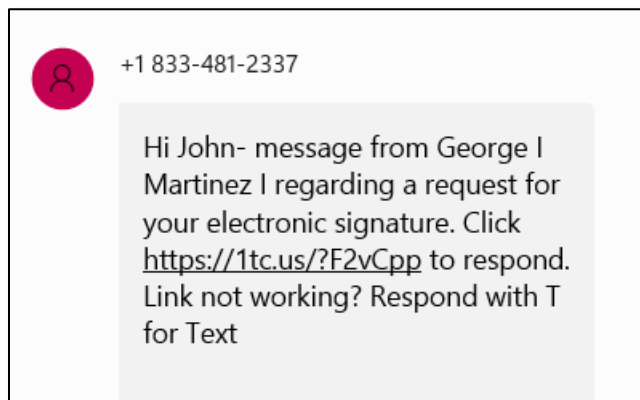
Here is an example of what the email notification would look like:

File   Message   Help   Acrobat   Tell me what you want to do

SARA <sara-dev@sara-digital.awsapps.com>   1▾   11:06 AM
WIOA DEMO is requesting your electronic signature

Hi John,

Document(s) requiring your signature are ready for signing. Please click the link below to initiate the signing process.

Keep this e-mail secret - do not share. This e-mail contains a secure link to sign a legally binding document. Do not share this private link.

Please click HERE to respond

Regards,
John Wayne, Vocational Rehabilitation Counselor
New Mexico Division of Vocational Rehabilitation
Albuquerque, NM 87114
Office Phone: (505) 999-8556

Click Here to opt out from future assignment emails.

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The Program Participant would click on the link in the email or text to access the document for eSignature.
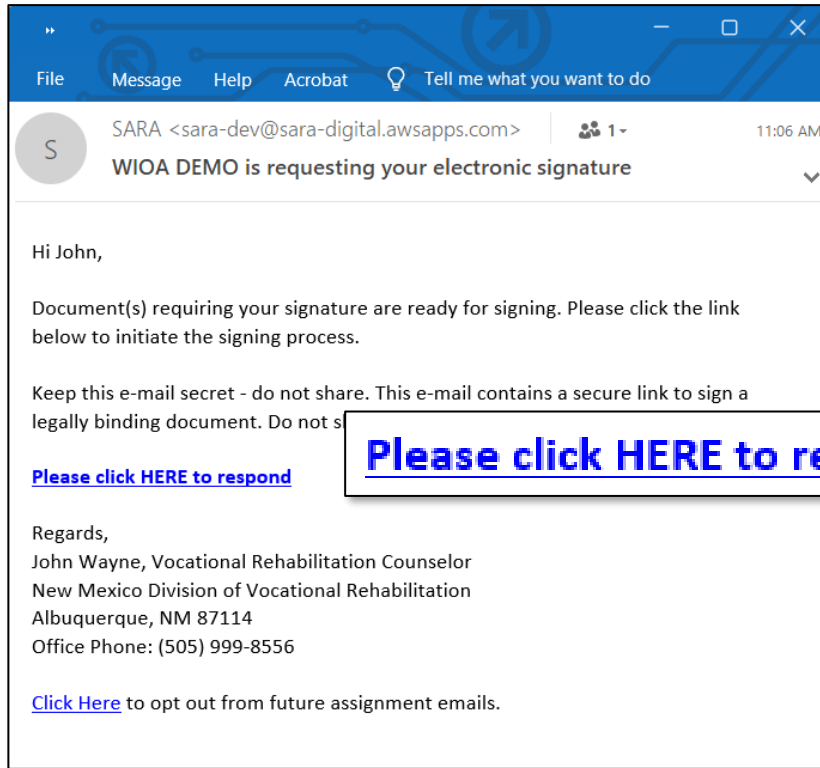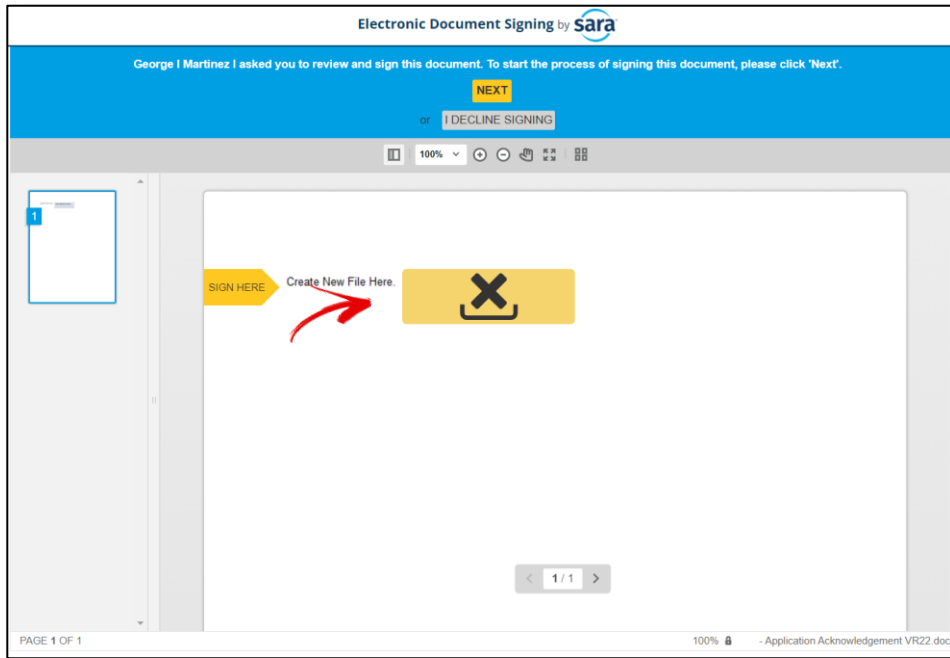
This will transport them to the [Document for eSignature] web page:
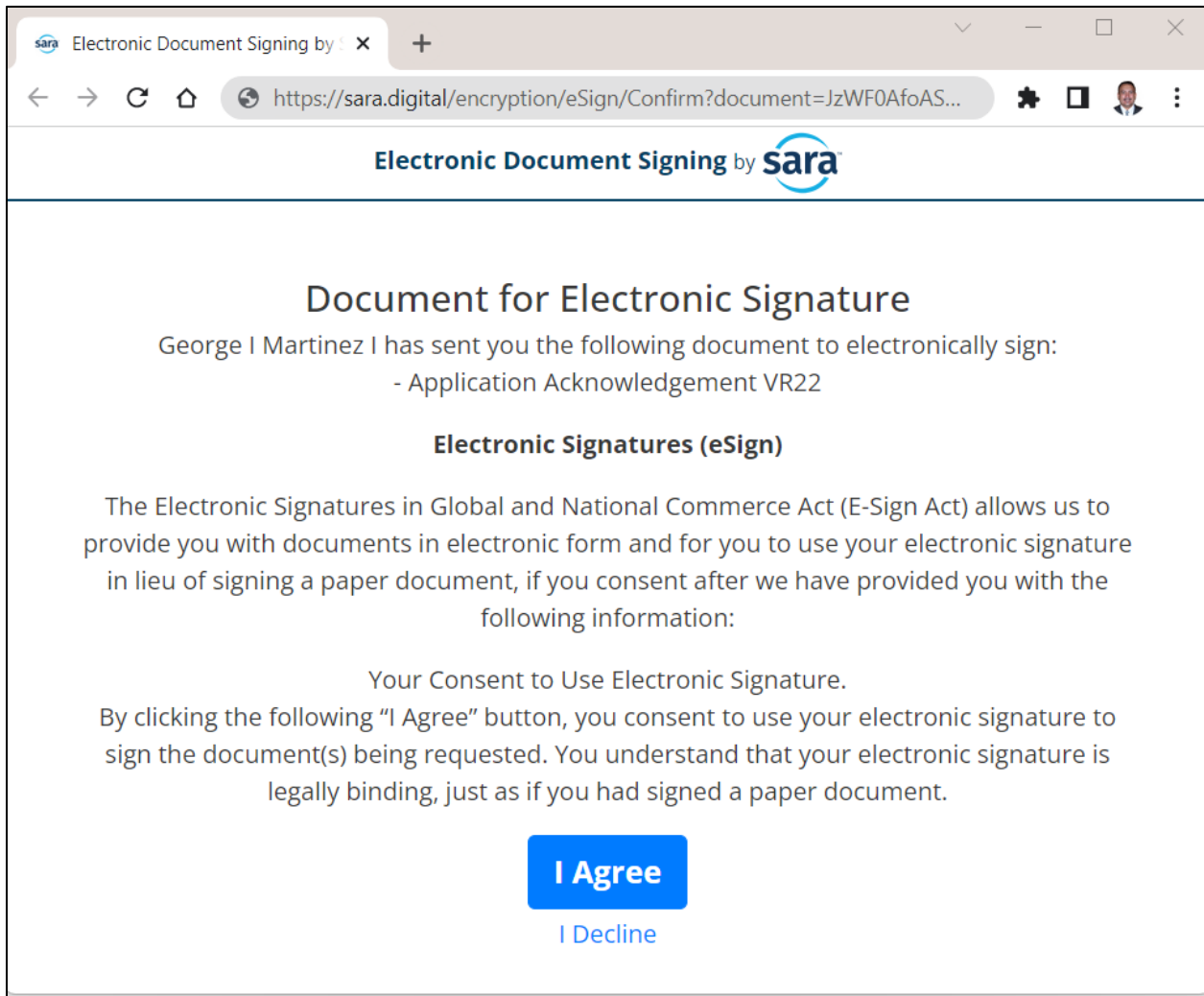
The Program Participant clicks on the [I Agree] button and e-VA will display the Document and instructions for how to eSign the document.
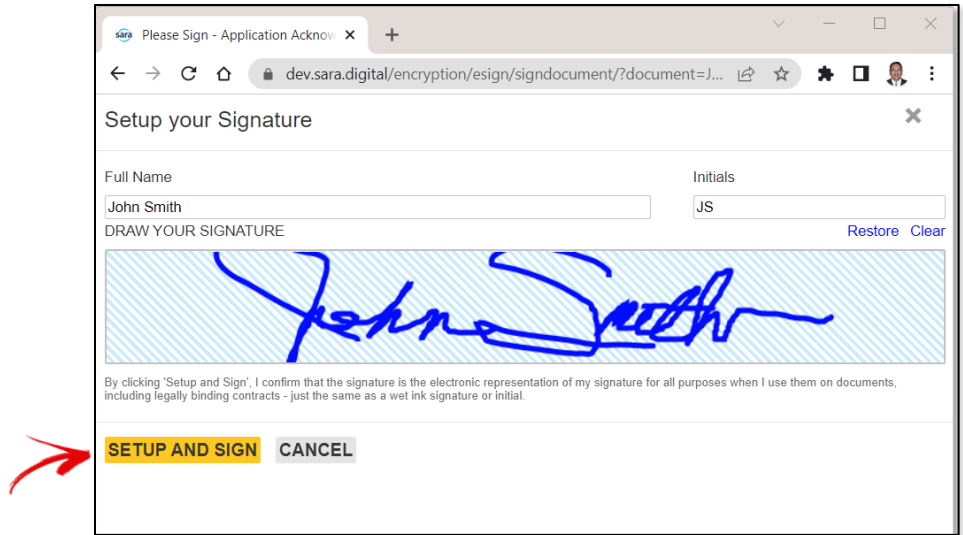
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Here the Program Participant will click on the [X] or the [Next] button to created their eSignature.

e-VA will then instruct the Program Participant to set up their eSignature.
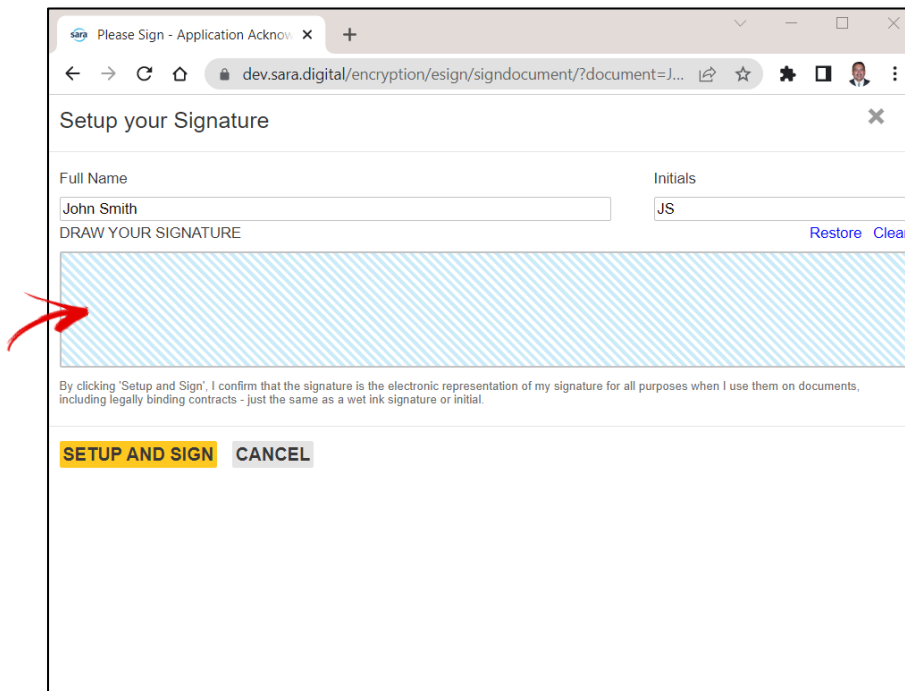
Once the Program Participant has created their eSignature, they would click on the [SETUP AND SIGN] yellow button.

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.

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e-VA will then display confirmation that the signing is complete and prompt the Program Participant to submit the document.
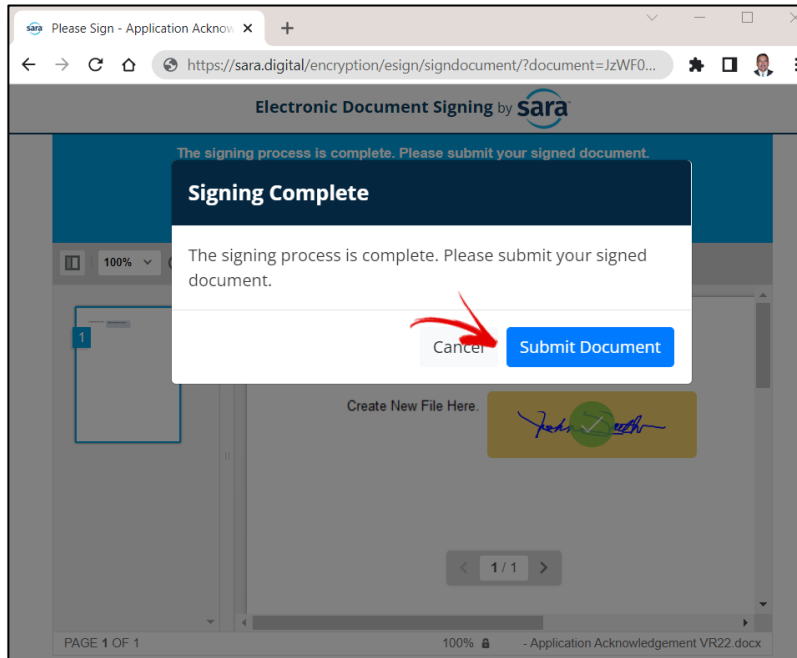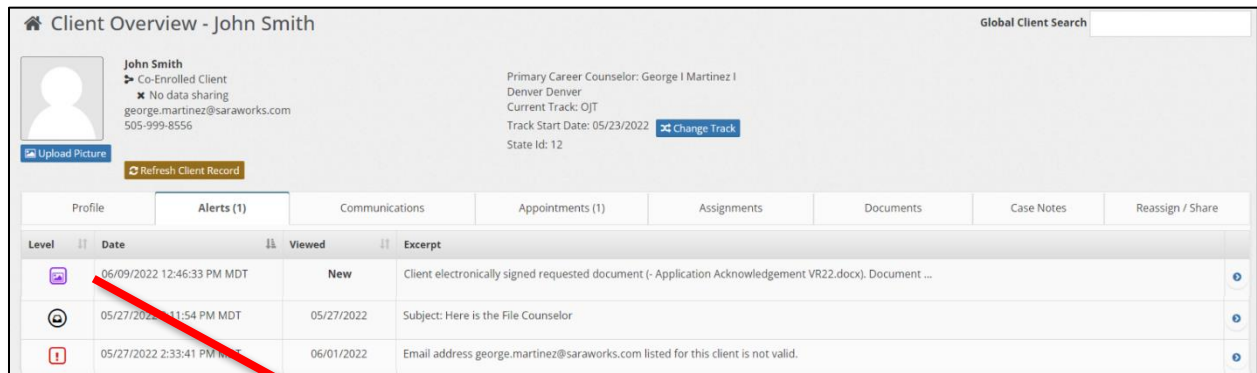
Once the eSigned document has been submitted, e-VA will display a confirmation message and will provide the Program Participant the option to download the eSigned document.

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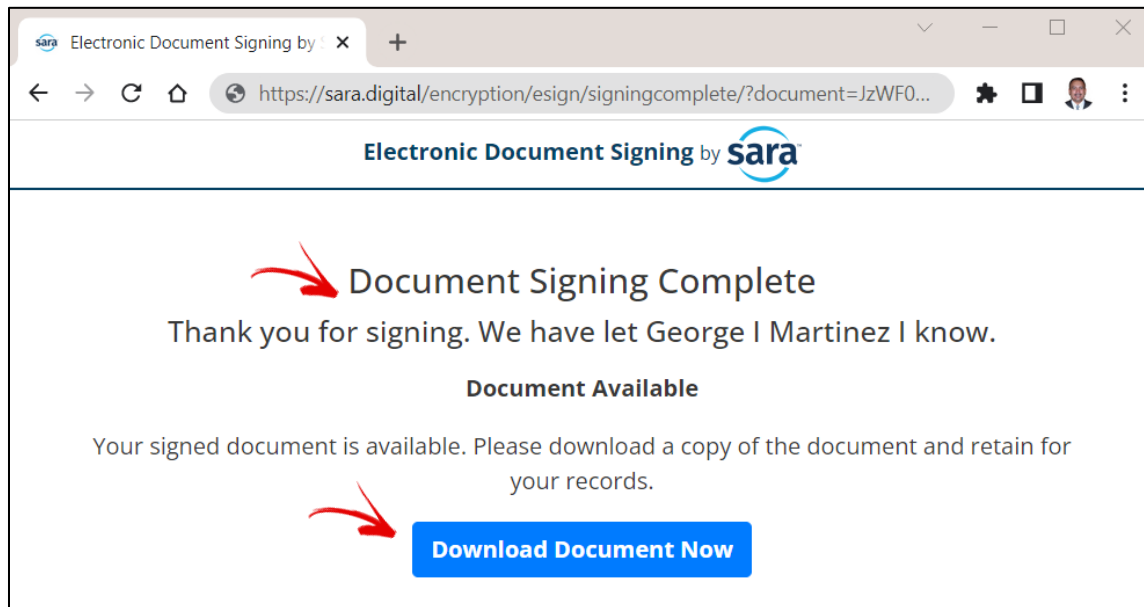
12. How the Counselor Receives the eSigned Document

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

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.

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e-VA will also document as a case note (shown below), that the eSigned document has been received.
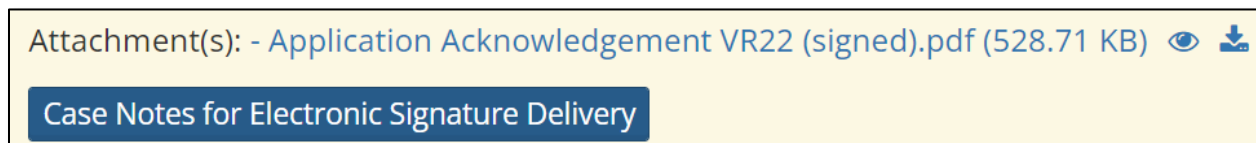
06/09/2022 12:46:33 PM MDT - Assignments - Document Signed

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) 👁 ⬇