

Documents from e-VA to VBMS Process

As part of e-VA's Implementation of the Document Management Center Module, this presentation will show you how documents added to e-VA will be sent to VBMS.



1. Document is Filed in e-VA

For a document to be sent to VBMS, it must be filed in the Client's [Documents] folder. There are several ways to add a file to a Client's e-VA record.

Client Overview - Wyatt Earp

Global Client Search

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

Primary VRC: George I Martinez I
Regional Office 340 - Albuquerque
Current Track: Rehab to Employment - CH 31
Track Start Date: 11/20/2022 [Change Track](#)

[Upload Picture](#) [Refresh Client Record](#)

Profile Alerts Communications Appointments Assignments **Documents** Case Notes Reassign / Share / Refer

[Send Document for Signing](#) [Add File](#)

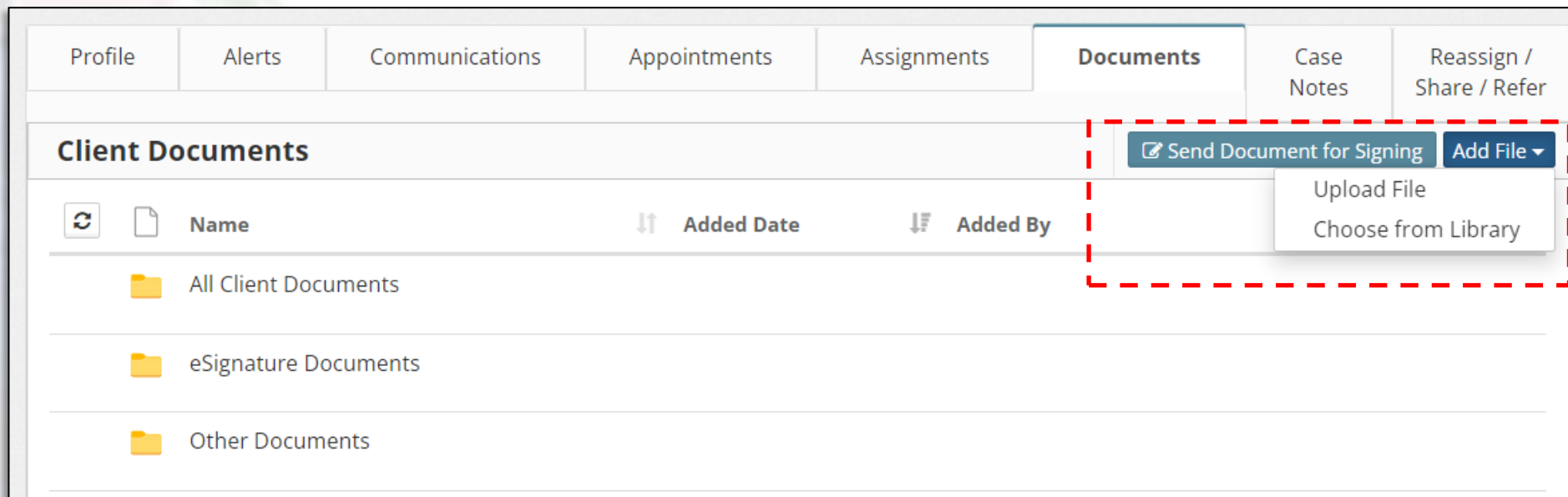
Client Documents

Name	Added Date	Added By	Size
All Client Documents			
eSignature Documents			
Other Documents			
Received Documents			
Sent Documents			

A. How to File a Document:

- ✓ Upload the file or choose a file from the library.

From the [Documents] tab, select [Add File] to reveal the two options.



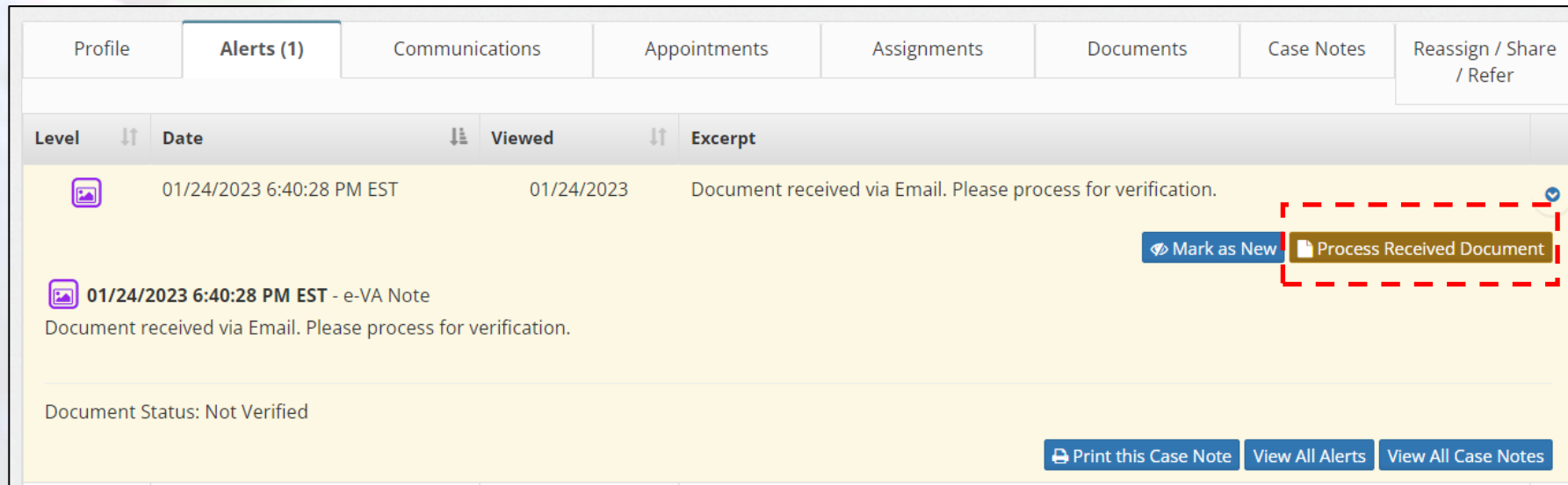
The screenshot displays the 'Documents' tab in the e-VA interface. The top navigation bar includes tabs for Profile, Alerts, Communications, Appointments, Assignments, Documents (selected), Case Notes, and Reassign / Share / Refer. Below the navigation bar, the 'Client Documents' section is visible, featuring a table with columns for Name, Added Date, and Added By. The table lists three folders: All Client Documents, eSignature Documents, and Other Documents. A red dashed box highlights the 'Add File' dropdown menu, which is open, showing two options: 'Upload File' and 'Choose from Library'. A red arrow points to the 'Add File' button.

	Profile	Alerts	Communications	Appointments	Assignments	Documents	Case Notes	Reassign / Share / Refer
Client Documents								
						Send Document for Signing		Add File
						Upload File		Choose from Library



B. How to File a Document:

✓ File is received from Client and is processed.

From the [Alerts] tab, you must select the **Purple** Alert to review and approve the file received before it can be sent to VBMS. To process the file, click on the [Process Received Document] button.



The screenshot displays the 'Alerts (1)' tab in a software interface. The main content area shows a list of alerts. The first alert is highlighted in yellow and contains the text: '01/24/2023 6:40:28 PM EST - e-VA Note' and 'Document received via Email. Please process for verification.' To the right of this alert, there are two buttons: 'Mark as New' and 'Process Received Document'. The 'Process Received Document' button is highlighted with a red dashed box, and a red arrow points to it from the right side of the image. Below the alert list, there is a section for 'Document Status: Not Verified' and three buttons: 'Print this Case Note', 'View All Alerts', and 'View All Case Notes'.

Level	Date	Viewed	Excerpt
	01/24/2023 6:40:28 PM EST	01/24/2023	Document received via Email. Please process for verification.
	01/24/2023 6:40:28 PM EST - e-VA Note		Document received via Email. Please process for verification.

C. How to File a Document:

- ✓ **The File is added from a Counselor sent email.**

From the [Communications] tab, select [Compose Email] and add a file(s) to the email to reveal the options. Note: If you do not select a document to be sent to the Documents folder, that document will not be sent to VBMS.

Send Email to Wyatt Earp

To: george.martinez@saraworks.com (Primary)

Cc:

Subject: Orientaion

Hi Wyatt,
Please review the attached files.
Regards,
George I Martinez I, VRC
VBA VR&E
Office Phone: (505) 999-8556

Attachments:

Click to choose or drag and drop file here | Choose from library

28-0588.pdf (235.72 KB) Add to Sent Documents?

3288.docx.esign (48.98 KB) Add to Sent Documents?

VA form 28-1904.pdf (189.01 KB) Add to Sent Documents?

2. Case Note is Created with Document

Profile Alerts Communications Appointments Assignments Documents **Case Notes** Reassign / Share / Refer

Show: All Search Has Attachments

<input type="checkbox"/>	<input type="button" value="Print"/>	
<input type="checkbox"/>		01/19/2023 3:21:56 PM EST - Document Added Document [SF1034-87c.pdf] added to client Document Library (Other Documents\VRE Correspondence - 1246) by George I Martinez I Attachment(s): <input type="button" value="SF1034-87c.pdf 568.01 KB"/>

3. Case Note and Document are Processed to VBMS

e-VA Case Note with Document

01/19/2023 3:21:56 PM EST - Document Added
 Document [SF1034-87c.pdf] added to client Document Library (Other Documents\WRE Correspondence - 1246) by George I Martinez I

Attachment(s):

SF1034-87c.pdf 568.01 KB

**e-VA Case Note
 Posts to
 CWINRS**

**Document is
 sent to VBMS**

Veteran Documents - Showing 1-24 of 24 documents											
	Receipt Date	Storage Date	Document Type	Subject	System Source	Source Comment	Uploading User Role	POA Organization	Originator First Name	Originator Last Name	
<input type="checkbox"/>	07/10/2018	07/10/2018	VA 28-1900 Disabled Veterans Application for Vocational Rehabilitation	VA Form 28-1900	VBMS-UI		Authorizer Awards VSR Developer VSR		VALERIE		
<input type="checkbox"/>	07/18/2018	07/18/2018	VA 21-674 Report of School Attendance	VA Form 21-674	VBMS-UI		Authorizer Awards VSR Developer VSR		VALERIE		
<input type="checkbox"/>	07/10/2018	07/10/2018	VA 21-688c Application Request To Add And/Or Remove Dependents	VA Form 21-688c	VBMS-UI		Authorizer Awards VSR Developer VSR		VALERIE		
<input type="checkbox"/>	07/09/2018	07/09/2018	Rating Decision - Codesheet	Rating Decision - Codesheet	RATING		Developer VSR Rating VSR		BEVERLY		
<input type="checkbox"/>	07/09/2018	07/09/2018	Rating Decision - Narrative	Rating Decision - Narrative	RATING		Developer VSR Rating VSR		BEVERLY		



e-VA Case Notes and Documents are typically sent within 5 minutes of being created to CWINRS and VBMS

