

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

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

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

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

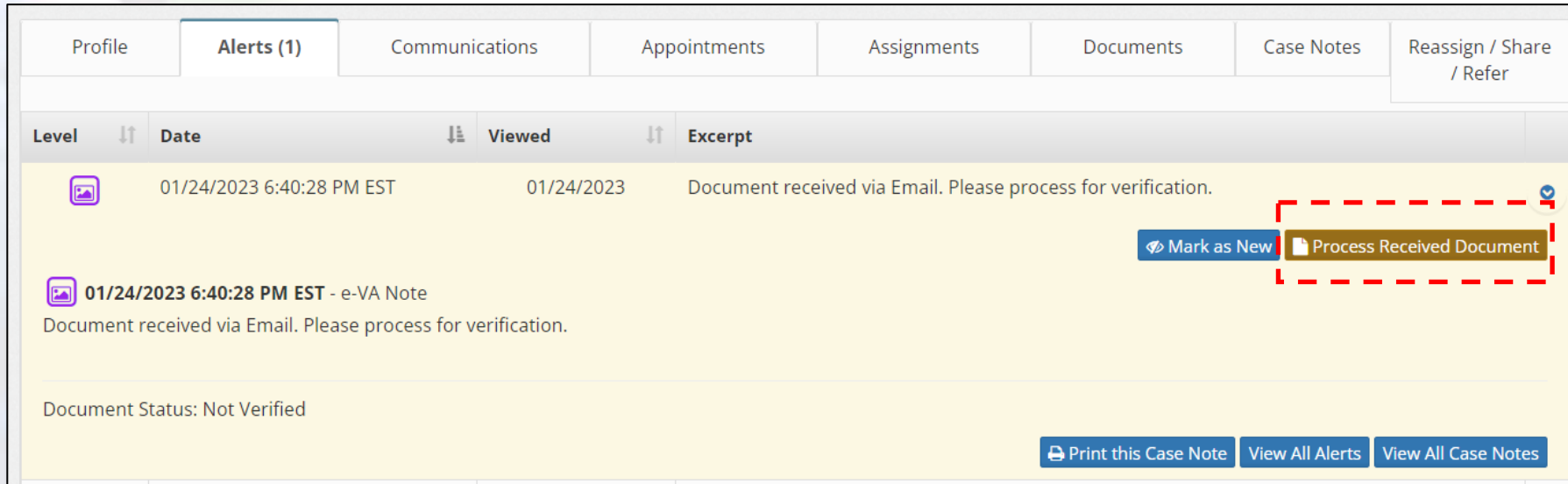
From the [Documents] tab, select [Add File] to reveal the two options.

A screenshot of the 'Add File' dropdown menu. The menu is open, showing two options: 'Upload File' and 'Choose from Library'. The 'Add File' button is highlighted in blue.



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 shows the 'Alerts (1)' tab in the e-VA interface. The table lists alerts with columns for Level, Date, Viewed, and Excerpt. A red dashed box highlights the 'Process Received Document' button next to the alert. A red arrow points to this button.

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.

Document Status: Not Verified

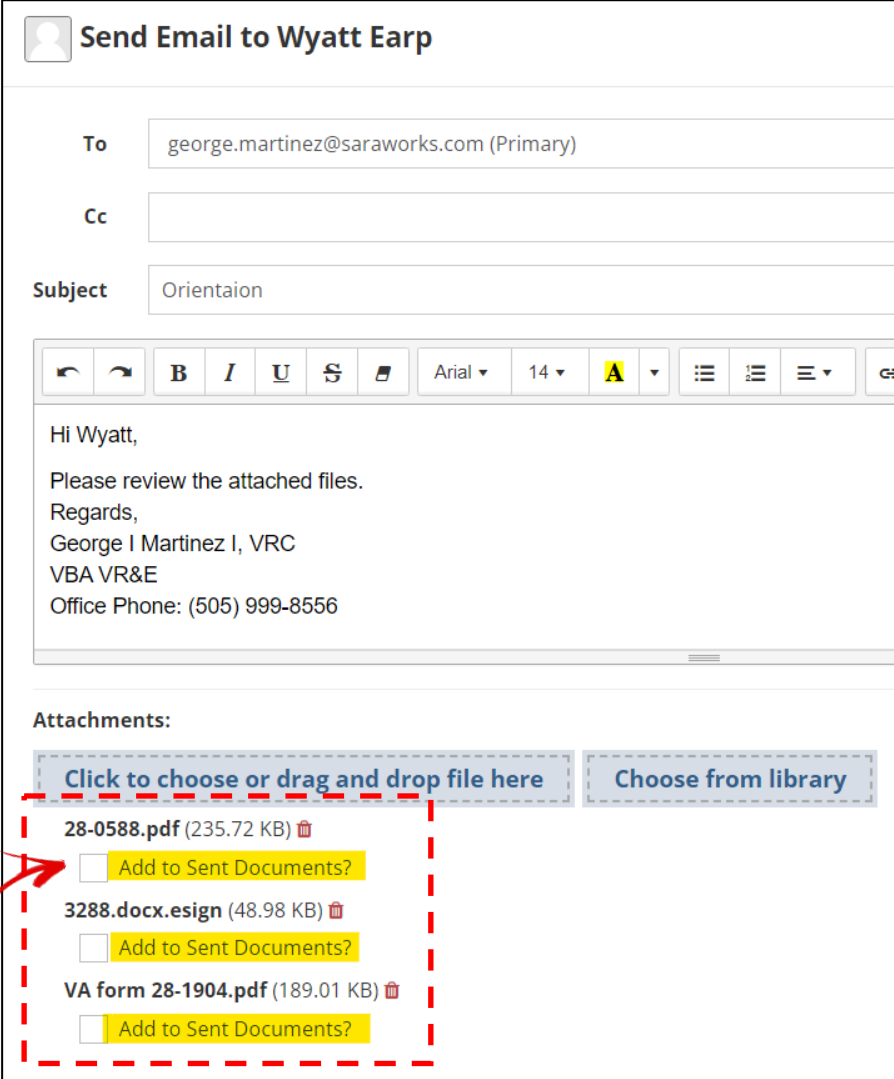
Buttons: [Mark as New](#) [Process Received Document](#) [Print this Case Note](#) [View All Alerts](#) [View All Case Notes](#)

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. This is important because there may be blank or unfilled documents that you are sending to the Veteran that you do not want to be filed in VBMS.



The screenshot shows an email composition window titled "Send Email to Wyatt Earp". The "To" field contains "george.martinez@saraworks.com (Primary)". The "Cc" field is empty. The "Subject" field contains "Orientaion". Below the fields is a rich text editor with a toolbar containing icons for undo, redo, bold, italic, underline, strikethrough, text color, font family, font size, background color, bulleted list, numbered list, and indent. The email body text reads: "Hi Wyatt, Please review the attached files. Regards, George I Martinez I, VRC VBA VR&E Office Phone: (505) 999-8556". Below the body is an "Attachments:" section with two buttons: "Click to choose or drag and drop file here" and "Choose from library". Below these buttons is a list of three attachments, each with a checkbox and a yellow button labeled "Add to Sent Documents?". The attachments are: "28-0588.pdf (235.72 KB)", "3288.docx.esign (48.98 KB)", and "VA form 28-1904.pdf (189.01 KB)". A red dashed box highlights the attachment list, and a red arrow points to the first attachment's checkbox.

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:

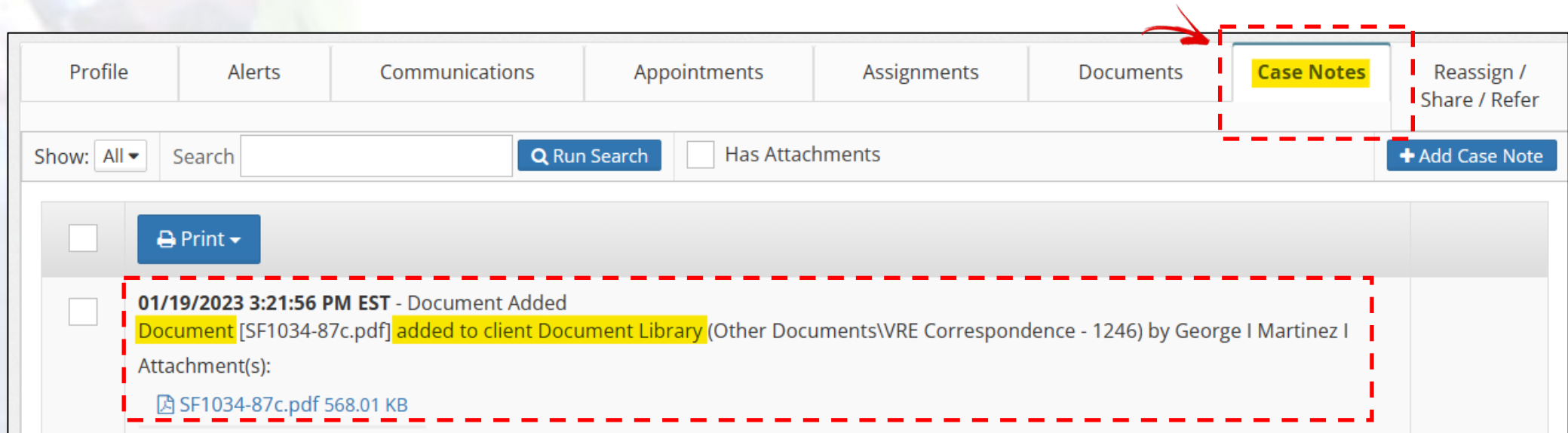
Click to choose or drag and drop file here Choose from library

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



The screenshot shows the e-VA Case Notes interface. At the top, there is a navigation bar with tabs: Profile, Alerts, Communications, Appointments, Assignments, Documents, Case Notes, and Reassign / Share / Refer. The 'Case Notes' tab is highlighted in yellow and enclosed in a red dashed box. A red arrow points to this tab. Below the navigation bar, there is a search section with a 'Show: All' dropdown, a search input field, a 'Run Search' button, and a 'Has Attachments' checkbox. To the right of the search section is a '+ Add Case Note' button. Below the search section, there is a table of case notes. The first row is highlighted in gray and contains a 'Print' button. The second row contains a case note entry, which is also enclosed in a red dashed box. The entry text is: '01/19/2023 3:21:56 PM EST - Document Added'. Below this, it says 'Document [SF1034-87c.pdf] added to client Document Library (Other Documents\VRE Correspondence - 1246) by George I Martinez I'. Below that, it says 'Attachment(s):' followed by a link to 'SF1034-87c.pdf 568.01 KB'.



The Case Note with the file attached, showing that your file was added to the Client's Documents folder, is [your confirmation that the file WILL be sent to VBMS.](#)

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

Receipt Date	Storage Date	Document Type	Subject	System Source	Source Comment	Uploading User Role	POA Organization	Originator First Name	Originator Last Name
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	
07/10/2018	07/10/2018	VA 21-674 Report of School Attendance	VA Form 21-674	VBMS-UI		Authorizer Awards VSR Developer VSR		VALERIE	
07/10/2018	07/10/2018	VA 21-686c Application Request To Add And/Or Remove Dependents	VA Form 21-686c	VBMS-UI		Authorizer Awards VSR Developer VSR		VALERIE	
07/09/2018	07/09/2018	Rating Decision - Codesheet	Rating Decision - Codesheet	RATING		Developer VSR Rating VSR		BEVERLY	
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 transferred into CWINRS and VBMS typically within 15 minutes of being created.

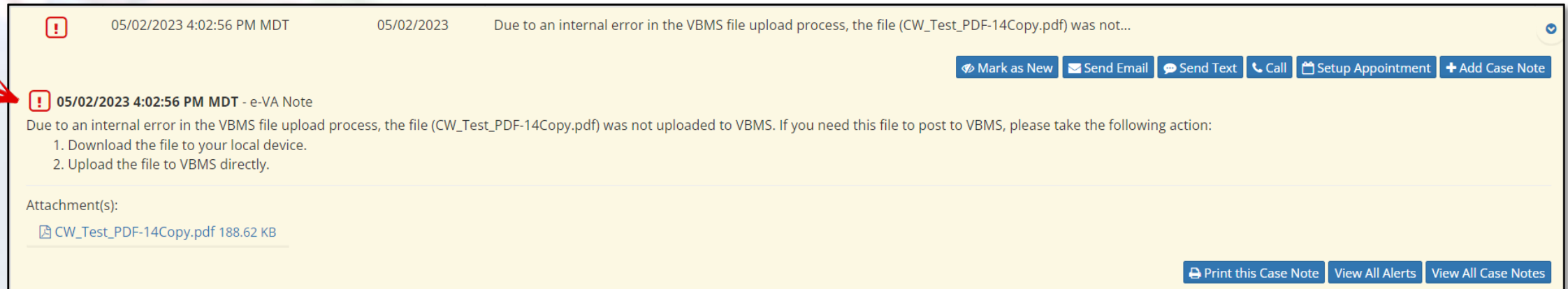
4. Notification to Counselor that File Did Not Upload to VBMS

e-VA will notify you via a **Red Alert** if the file sent to VBMS cannot be uploaded. There are two types of notifications:

- Failed to upload due to an internal error at VBMS
- Failed to upload because the file sent was not in PDF format

4. Notification to Counselor that File Did Not Upload to VBMS

Failed to Upload due to an internal error at VBMS – Red Alert Notification



The screenshot shows a notification interface with a yellow background. At the top, a header bar contains a red alert icon, the date and time '05/02/2023 4:02:56 PM MDT', the date '05/02/2023', and the message 'Due to an internal error in the VBMS file upload process, the file (CW_Test_PDF-14Copy.pdf) was not...'. To the right of the header are several action buttons: 'Mark as New', 'Send Email', 'Send Text', 'Call', 'Setup Appointment', and 'Add Case Note'. Below the header, a red arrow points to a red alert icon next to the text '05/02/2023 4:02:56 PM MDT - e-VA Note'. The main body of the notification contains the text: 'Due to an internal error in the VBMS file upload process, the file (CW_Test_PDF-14Copy.pdf) was not uploaded to VBMS. If you need this file to post to VBMS, please take the following action:'. Below this text is a numbered list: '1. Download the file to your local device.' and '2. Upload the file to VBMS directly.'. At the bottom left, under the heading 'Attachment(s):', there is a link to 'CW_Test_PDF-14Copy.pdf 188.62 KB'. At the bottom right, there are three buttons: 'Print this Case Note', 'View All Alerts', and 'View All Case Notes'.

05/02/2023 4:02:56 PM MDT 05/02/2023 Due to an internal error in the VBMS file upload process, the file (CW_Test_PDF-14Copy.pdf) was not...

Mark as New Send Email Send Text Call Setup Appointment Add Case Note

05/02/2023 4:02:56 PM MDT - e-VA Note

Due to an internal error in the VBMS file upload process, the file (CW_Test_PDF-14Copy.pdf) was not uploaded to VBMS. If you need this file to post to VBMS, please take the following action:

1. Download the file to your local device.
2. Upload the file to VBMS directly.

Attachment(s):

[CW_Test_PDF-14Copy.pdf 188.62 KB](#)

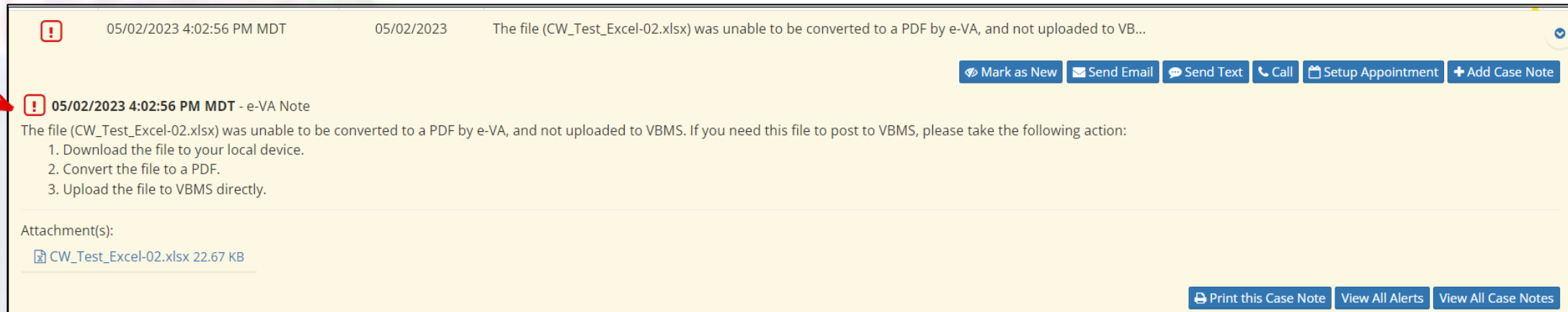
Print this Case Note View All Alerts View All Case Notes

Due to an internal error in the VBMS file upload process, the file (name of file.pdf) was not uploaded to VBMS. If you need this file to post to VBMS, please take the following action:

1. Download the file to your local device.
2. Upload the file to VBMS directly.

4. Notification to Counselor that File Did Not Upload to VBMS

Failed to upload to VBMS, file not in PDF format – Red Alert Notification



The screenshot shows a notification interface with a yellow background. At the top, a header bar contains a red alert icon, the date and time '05/02/2023 4:02:56 PM MDT', the date '05/02/2023', and the message 'The file (CW_Test_Excel-02.xlsx) was unable to be converted to a PDF by e-VA, and not uploaded to VB...'. Below the header, there are several action buttons: 'Mark as New', 'Send Email', 'Send Text', 'Call', 'Setup Appointment', and 'Add Case Note'. The main body of the notification starts with a red alert icon and the text '05/02/2023 4:02:56 PM MDT - e-VA Note'. It then states: 'The file (CW_Test_Excel-02.xlsx) was unable to be converted to a PDF by e-VA, and not uploaded to VBMS. If you need this file to post to VBMS, please take the following action:'. This is followed by a numbered list: '1. Download the file to your local device.', '2. Convert the file to a PDF.', and '3. Upload the file to VBMS directly.'. Below the list, it says 'Attachment(s):' and shows a link to 'CW_Test_Excel-02.xlsx 22.67 KB'. At the bottom right, there are three more buttons: 'Print this Case Note', 'View All Alerts', and 'View All Case Notes'.

05/02/2023 4:02:56 PM MDT 05/02/2023 The file (CW_Test_Excel-02.xlsx) was unable to be converted to a PDF by e-VA, and not uploaded to VB...

Mark as New Send Email Send Text Call Setup Appointment Add Case Note

05/02/2023 4:02:56 PM MDT - e-VA Note

The file (CW_Test_Excel-02.xlsx) was unable to be converted to a PDF by e-VA, and not uploaded to VBMS. If you need this file to post to VBMS, please take the following action:

1. Download the file to your local device.
2. Convert the file to a PDF.
3. Upload the file to VBMS directly.

Attachment(s):

[CW_Test_Excel-02.xlsx 22.67 KB](#)

Print this Case Note View All Alerts View All Case Notes

The file (name of file.pdf) was unable to be converted to a PDF by e-VA, and not uploaded to VBMS. If you need this file to post to VBMS, please take the following action:

1. Download the file to your local device.
2. Convert the file to a PDF.
3. Upload the file to VBMS directly.

5. Convert a File to PDF

Need to convert a file to PDF quickly? Click on [File] and select [Save as Adobe PDF]

