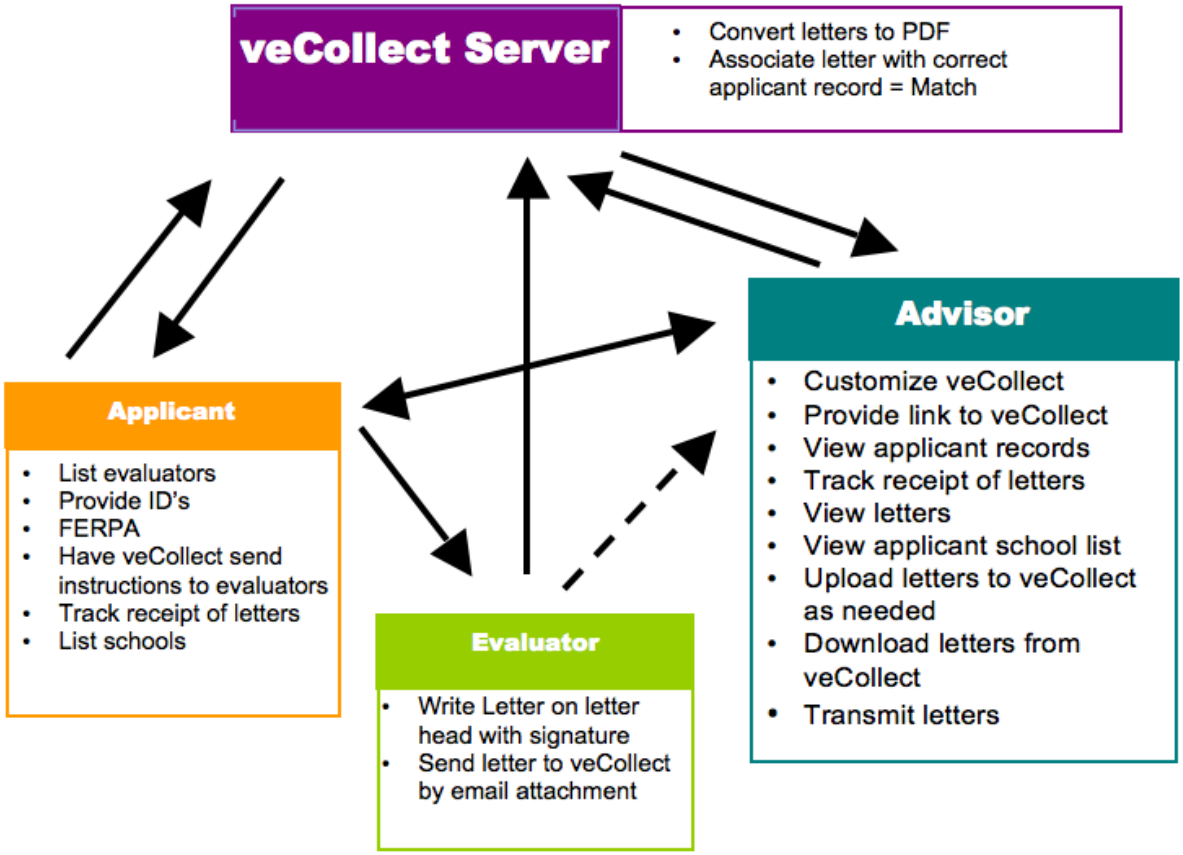
Welcome to veCollect

https://collect.virtualevals.net

Instructions for Advising Offices

The term “advisor” used in these instructions is meant to include advisors and/or advising office staff members authorized to use veCollect.

Flow Chart of How veCollect Works



These instructions are divided into five sections.

Section 1: Preparing your veCollect account before opening it up to applicants.
Section 2: Creating Evaluator Records and Letter Records.
Section 3: What applicants will need to do to use veCollect.
Section 4: What evaluators will do to submit letters to you through veCollect.
Section 5: How advisors work with veCollect after applicants begin to create records.

Please note that we have included instructional videos in veCollect.
Links to them will appear in the sidebars in orange text.

Section 1 - Preparing your veCollect account before opening it up to applicants.

1.0 Email help@virtualevals.org to indicate your interest in using veCollect. What should you include in the email?

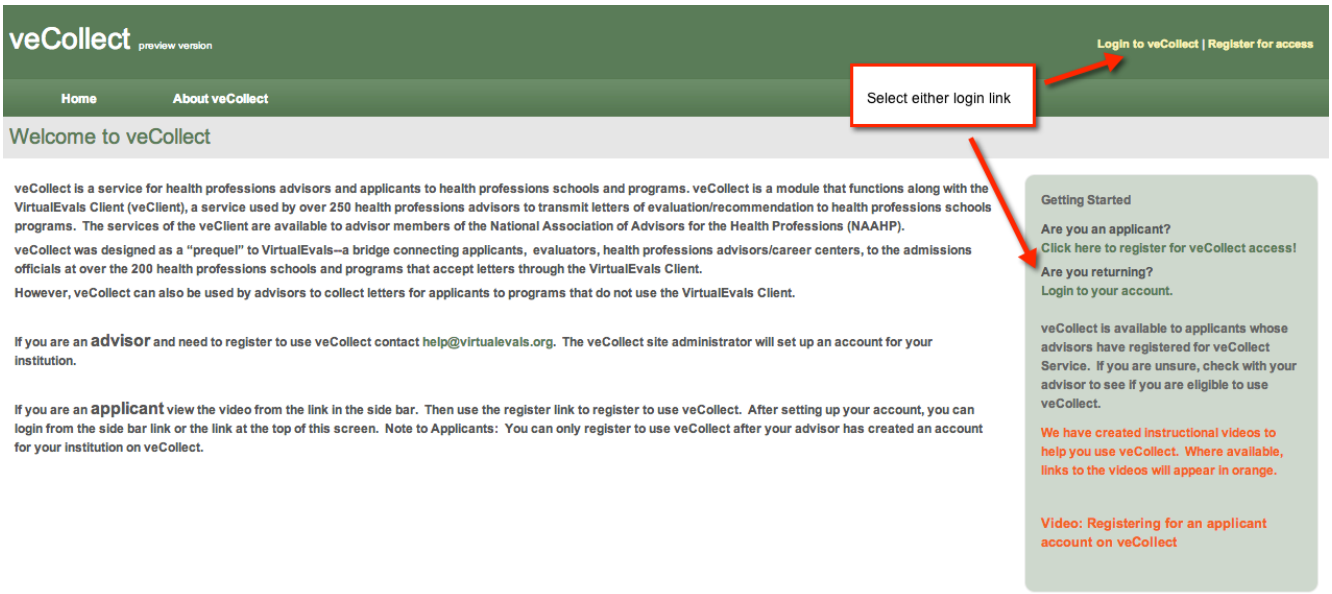
For veCollect you will request a primary user account in the name of one person in your office. We will create an account in that person's name. That person will then have the ability to create Advisor Accounts on veCollect for other authorized staff in the advising office. Option: If, in your letter process, members of your committee need to have access to letters for applicants, you may grant authorized veCollect access to those committee members so that they can read the letters on line for your applicants. You can suspend or delete their access at any time.

Note: Applicants will create their own user accounts after you provide to them the link to veCollect.

When you email help@virtualevals.org to ask us to set up your institution's user account, please make sure to include ***the name and email address of the person who will hold the primary user account*** for your institution. It may be the chief health professions advisor or another staff member in the office. But it should not be a temporary or short-term staff member.

1.1 We will send you an email with your permanent login (user name) and a temporary password. You will need to change the password immediately.

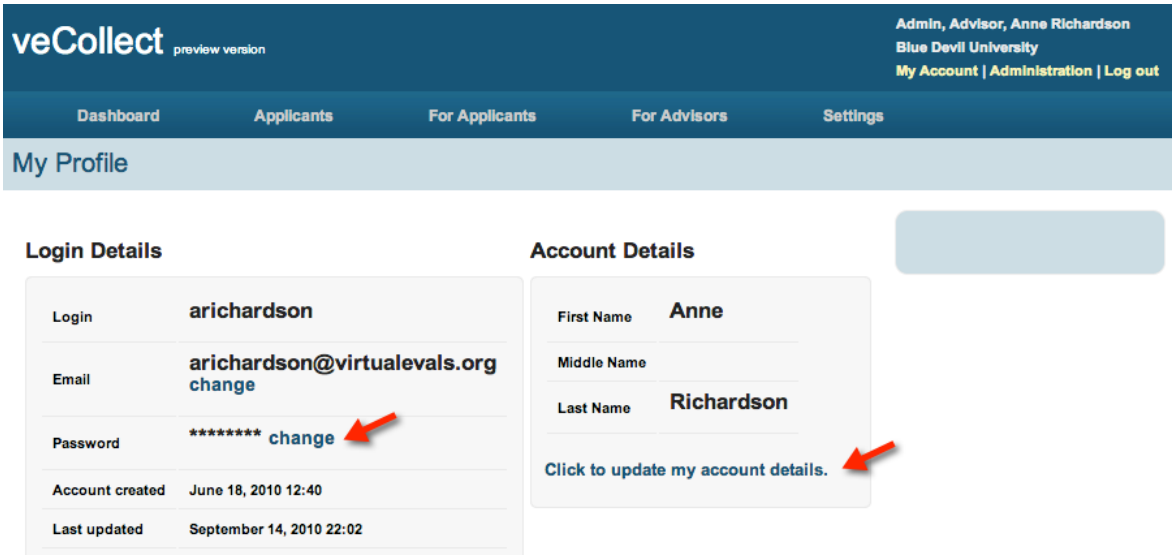
To login, go to: https://collect.virtualevals.net . You will want to bookmark that site.



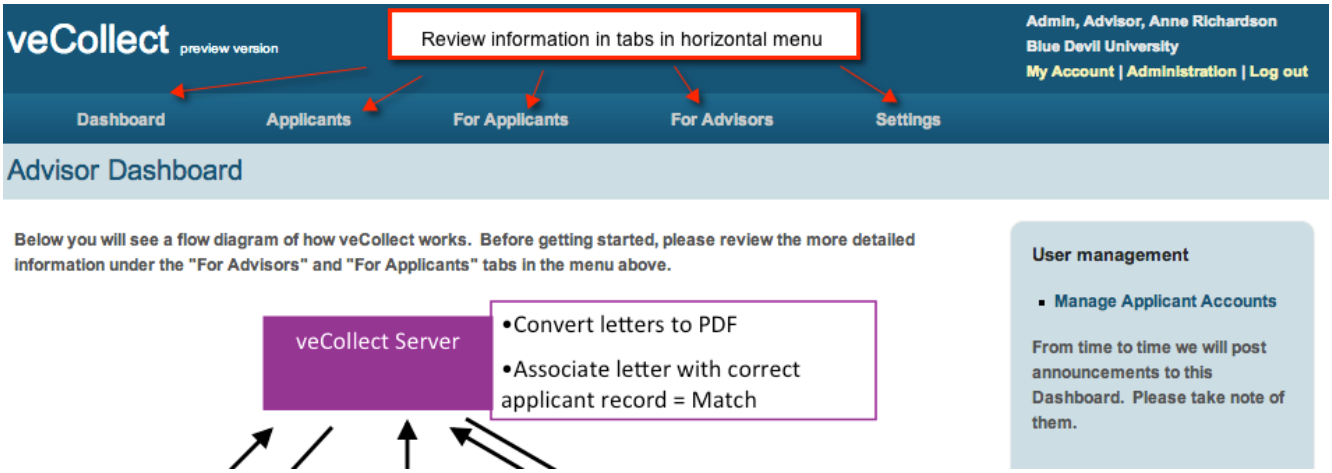
⇒ Select one of the two links to log into your account.

⇒ Use the assigned login and temporary password to access your account.

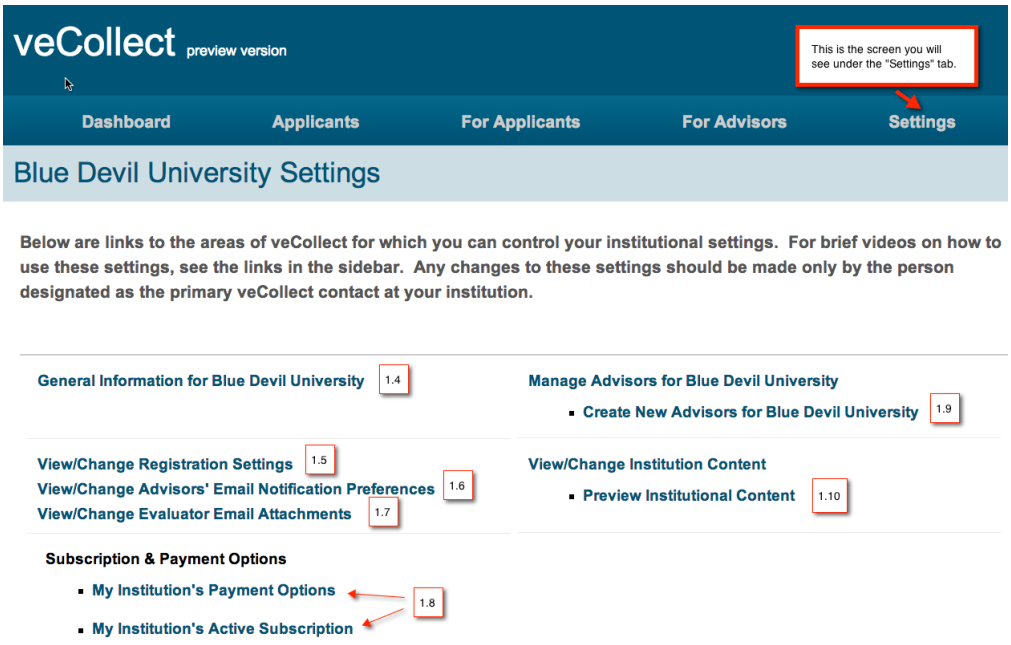
Once you have logged into your account for the first time, change the password to something you will remember. Make note of the password in a safe place. To change your password, click on “change” in the “login details” as shown in the figure below. An email will be sent to the email address you provided with instructions on selecting a new password. To change other information, e.g., name, email address, click on the link under account details.



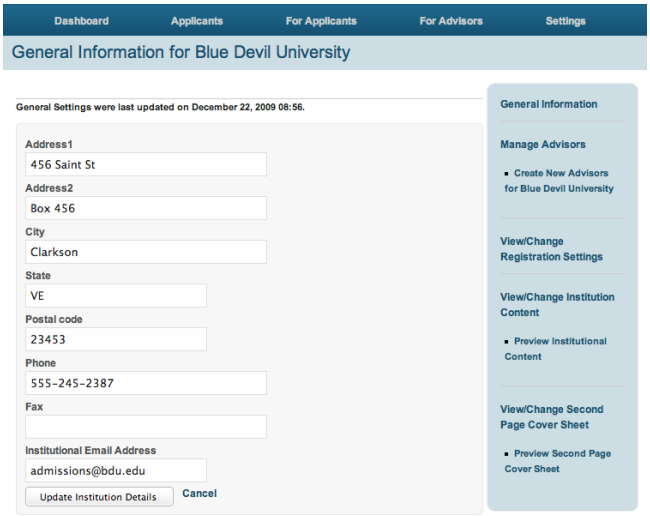
1.2 Familiarize yourself with the layout of veCollect. The screen you see when you login is the Advisor Dashboard. Please review each of the tabs in the horizontal menu at the top. Note that on certain screens there are links (shown in orange) to brief instructional videos, relevant to that screen.



1.3 Settings. As part of setting up your institutional veCollect account and ***before*** you allow applicants to access it, you will need to address the options under the "Settings" tab. We will review each of them in the section number as indicated below:

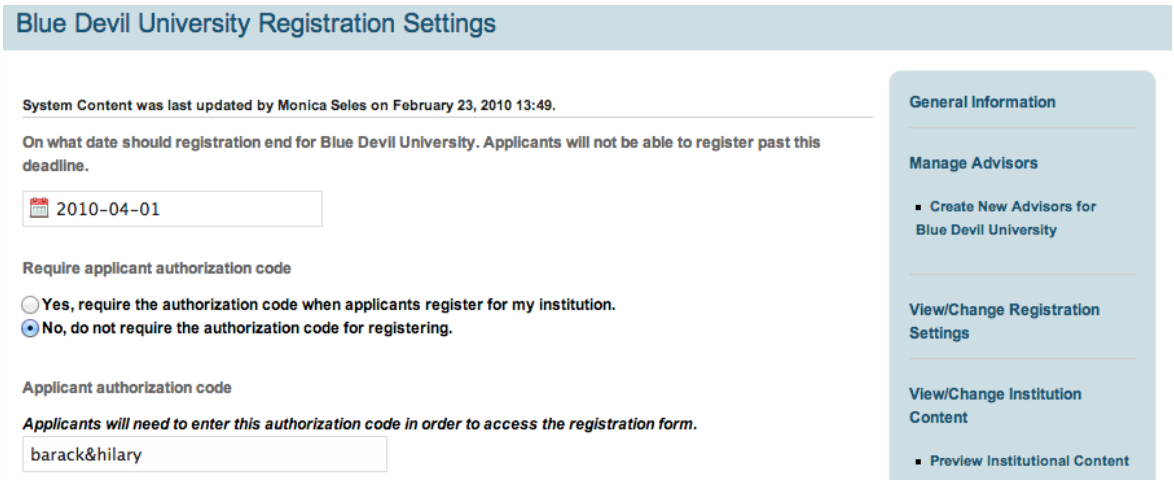


1.4 General Information for your institution. It is critical that we have current contact information for your advising office. We make it clear to evaluators that you have access to and are in control of the letters. Evaluators are given contact information for your office, so it is important that information is correct.



1.5 View/Change Registration Settings. Before you give applicants access to your institution's veCollect account, you will need to make decisions about how to control applicant access to the account.

From the "Settings" screen, select "View/Change Registration Settings. You will be taken to the screen below:



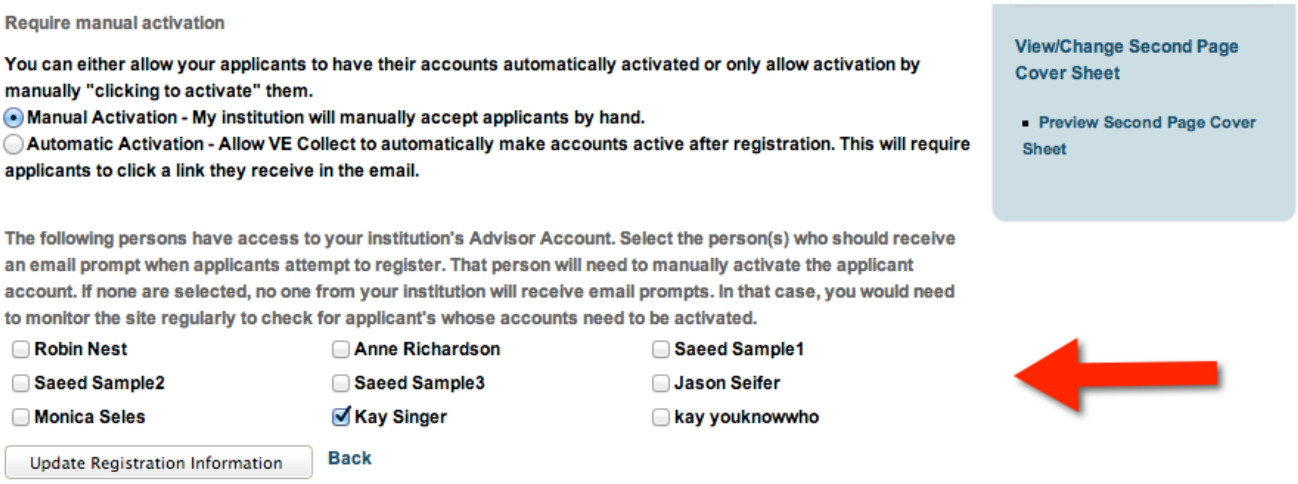
Setting a deadline for applicants to register for veCollect (recommended). You have the option of setting a deadline after which applicants will no longer be able to register to use veCollect through your institution. We reasoned that you likely have such a deadline now in your office and so we wanted to give you the option of carrying that over to veCollect. If you do not wish to have a deadline, choose a date way in the future.

Restricting registration of applicants to your veCollect account (recommended). Most advisors have some restrictions on who can have their letters processed through their office. What are some examples of why you might restrict access? Perhaps you only process letters for applicants who have pre-registered to use the services of your office and completed some type of prerequisite. Perhaps you only process letters for applicants who will graduate or have graduated from your institution with a Bachelor's degree—not employees or graduate students. Or perhaps you are the director of a post bac program that only processes letters for applicants who are enrolled in or have completed your program—not for all undergraduates from the school where your program is housed. In each of these cases you would not want to allow anyone who finds the link to veCollect on your website to register to use veCollect through your office.

You have the ability to control who registers as an applicant to use your veCollect account. There are two approaches to this. You can use one or the other or both.

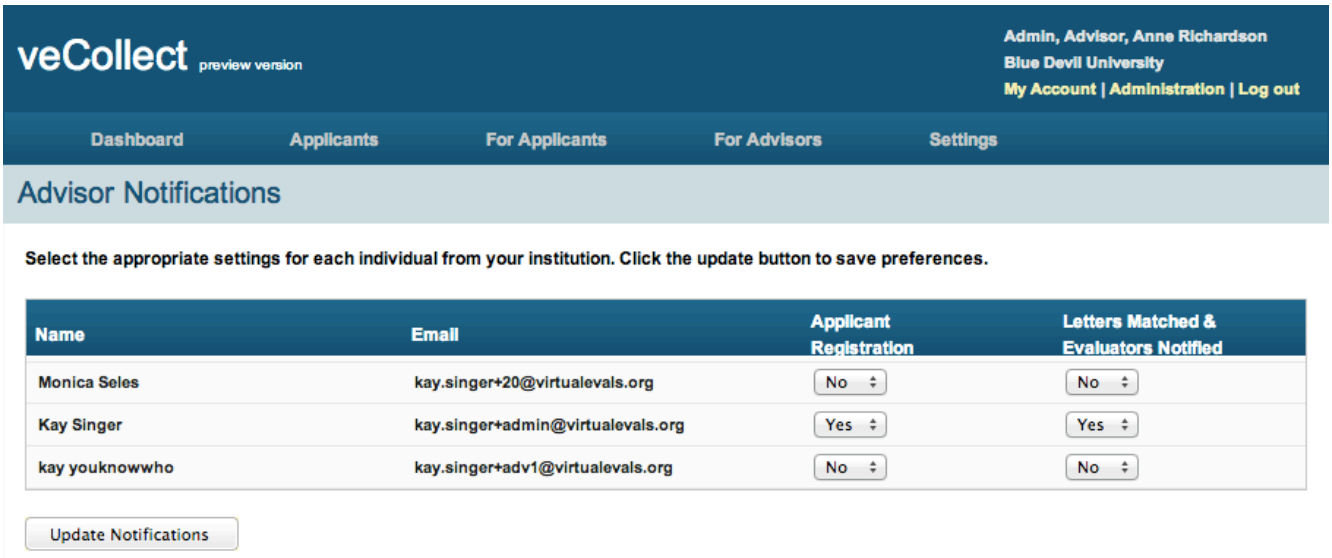
- **Require applicant authorization code.** If you choose this option you will assign an authorization code to your account and limit access to those with the authorization code. It is up to you how you provide that code to the applicants who should have it. In the screen shot above, you will see a random string of characters in this space as our default code. But you should change it to anything you wish. Just be sure to update it by clicking on update at the bottom of the page.

- **Require manual activation.** If you choose this option, you will need to go into veCollect and manually click on a link to activate the applicant's registration. You may elect to receive an email each time an applicant attempts to register for veCollect. You may direct that email to one or more of your Advisor Accounts—see the instructions below the description of manual activation as illustrated in the screen shot below.



1.6 View/Change Advisor's Email Notification Preferences. You have the option to have one or more persons in your office receive email notifications when an applicant registers to your veCollect account and/or when letters are matched and evaluators are notified of the match.

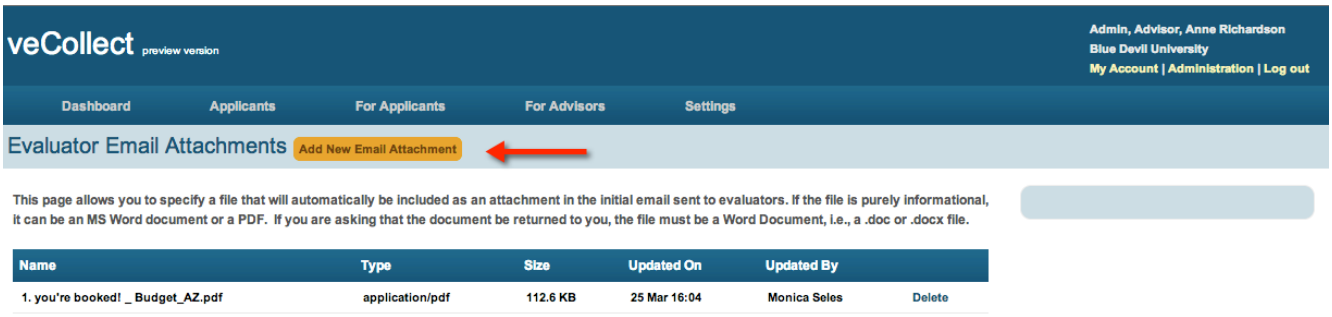
From the "Settings" screen, select "View/Change Advisor's Email Notification Preferences." You will then see the screen below.



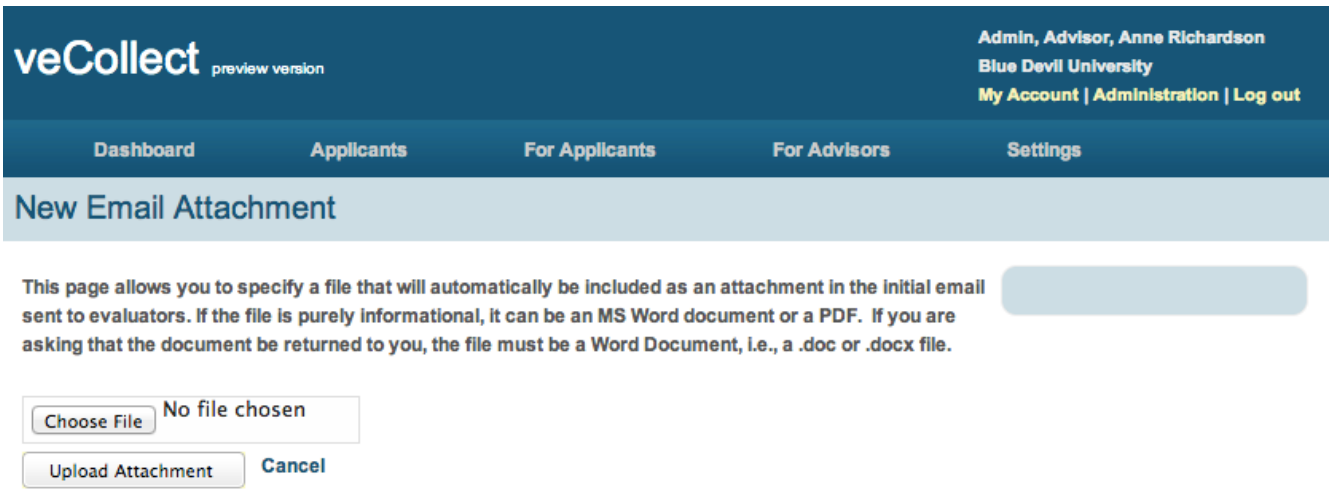
Simply use the drop-down list to select either “yes” or “no” for each user to indicate whether or not they should receive notifications from veCollect for each option. Be sure to click “Update Notifications” to save your changes.

1.7 View/Change Evaluator Email Attachments. You have the option to have veCollect attach one or more documents to the initial email sent to evaluators. This may be helpful if you would like to send additional instructions or information to evaluators or if your office requires additional forms to be returned along with the evaluation.

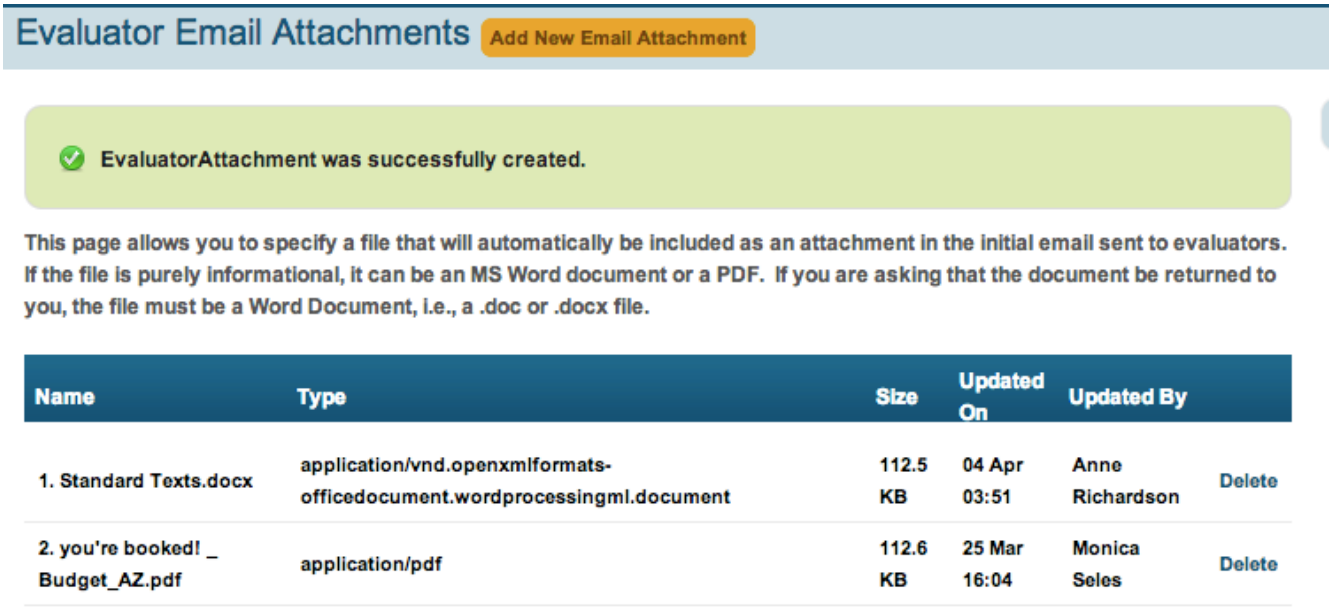
⇒ From the “Settings” screen, select “View/Change Evaluator Email Attachments.”



⇒ Click on the yellow “Add New Email Attachment” link. Select the file from your computer and then click on “Upload Attachment.”

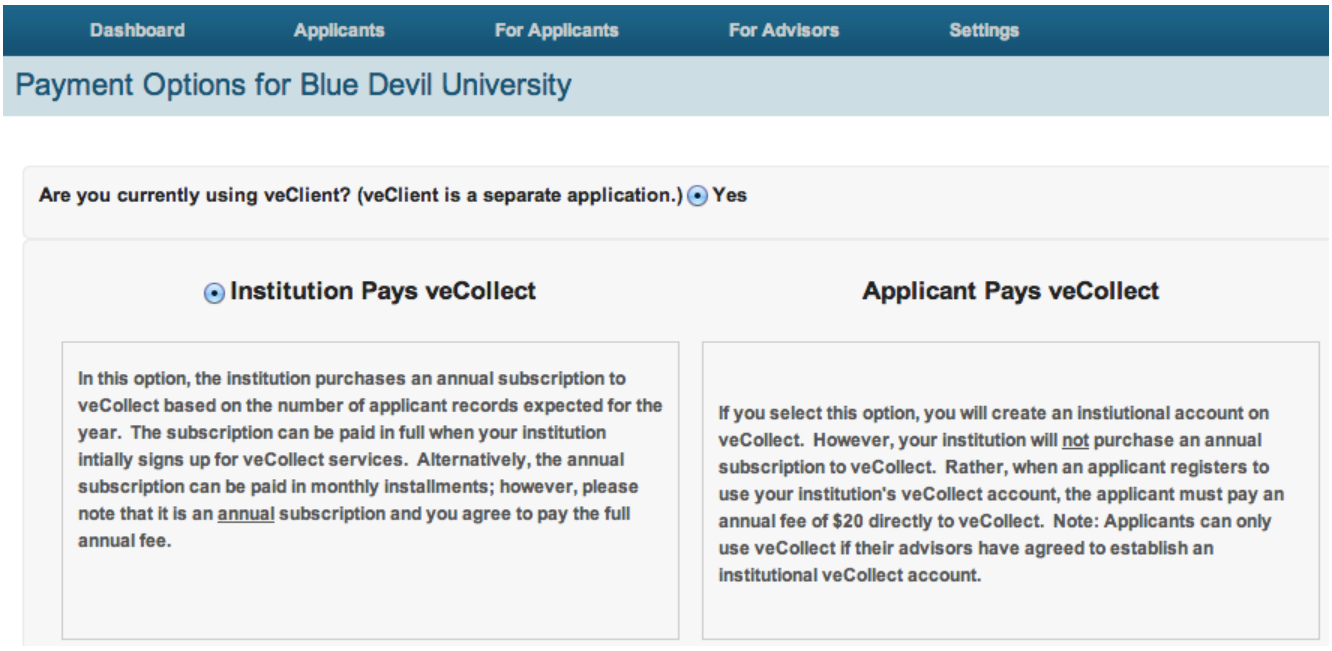


⇒ You will now see your new attachment listed as in the figure below.



1.8 Subscription and Payment Options. You must select a subscription plan and payment options for your veCollect institutional account.

You will select one of two payment options from the screen below.



The default is for your institution to purchase an annual subscription to veCollect, payable directly to VE. If you choose this option, it will be up to you whether or not you charge your applicants to cover your expenses for veCollect. The veCollect subscription is based upon how many applicants use your institutional veCollect account (within a range).

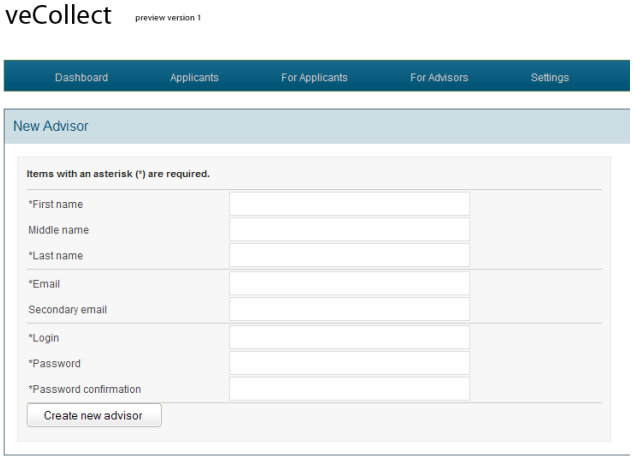
You can choose to have your applicants pay a fee directly to VE for veCollect services. If you choose this option, each applicant will pay a $20 annual fee to veCollect prior to having his/her veCollect account activated. You will still control access to the veCollect account for your institution and process letters in the same way you would if your institution were paying the fee. The only difference is the applicants will pay veCollect directly.

You will also select a subscription plan from the screen below.

Select a plan that fits your institution.	Annual	
Store up to 25 active applicants.	○	$250
Store up to 50 active applicants.	○	$500
Store up to 75 active applicants.	○	$750
Store up to 100 active applicants.	○	$1000
Store up to 150 active applicants.	○	$1500
Store up to 200 active applicants.	○	$2000
Store up to 250 active applicants.	○	$2500
Store up to 300 active applicants.	○	$3000
Store up to 400 active applicants.	○	$4000
Store up to 500 active applicants.	○	$5000

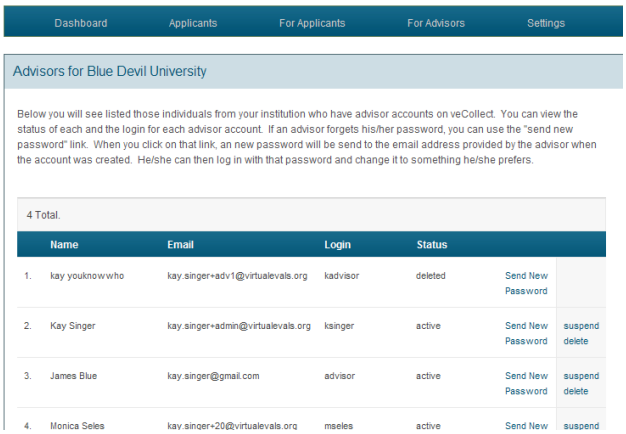
1.9 Managing Advisor Accounts. If you wish to create any additional Advisor Accounts, you can do that now or at a later time. You may want to limit the number of accounts until you get familiar with veCollect and then create additional accounts so that you can instruct users in veCollect.

To create additional accounts from the "Settings" screen, click on "Create New Advisors for…." You will be taken to a form to complete as shown in the screen shot below.



After you complete the form and click on “Create New Advisor”, the account will display in your Manage Advisor’s list. Note that in the form you will be assigning the person a login and password. You will need to provide those to the advisor. The advisor you added can then log into his/her account. If the advisor wants to change the password, he/she can do that. He/she cannot change the login.

From Manage Advisors you can also suspend or delete an advisor account. If an advisor/ staff member/ committee member no longer should have access to letters, please remember to delete that account for security reasons. If an advisor forgets his/her login and/or password you can help. You have access to the logins in the advisor list. And you can use the “send new password” link to provide a new password in the case of a forgotten one.

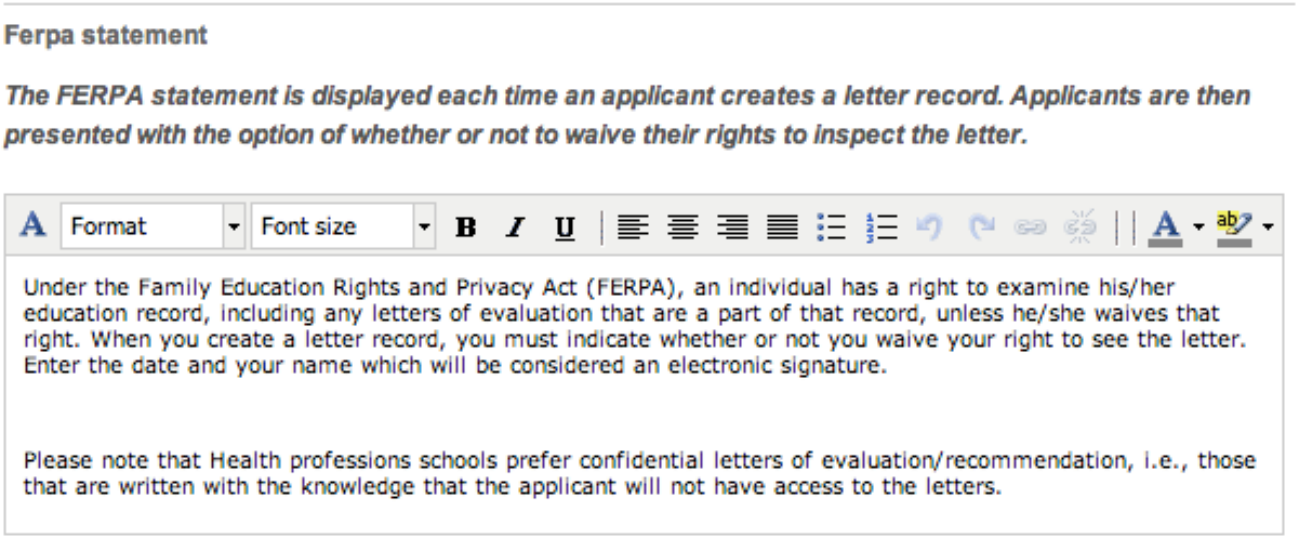


You will need to make sure that anyone for whom you create an advisor account knows how to use the veCollect system. Call attention to these instructions. There is a link to the instructions from the Advisor Dashboard – the first page Advisors see once they log into veCollect. It would be best to refer them to that link rather than give them a hard copy. Why? The instructions will likely change as we find areas that need expanded directions or further explanation. The link will take you to the most current version of the instructions. Also call attention to the instructional videos. And make sure they know that if they have a question, they should ask you rather than making a mistake.

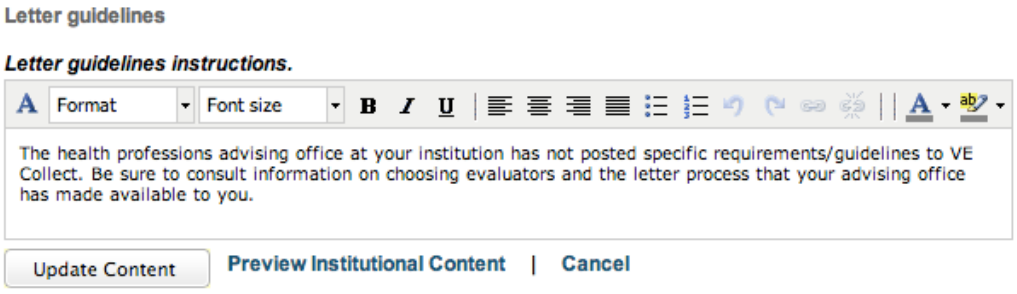
1.10 View/Change Institution Content. This exciting feature of veCollect makes it possible for your applicants to see in veCollect content that is specific to your institution’s letter process. We strongly recommend that you use the feature to insert your own letter guidelines. You can either accept our default wording for the FERPA statement or enter your own.

From the “Settings” screen, click on “View/Change Institution Content.” You will be taken to a screen that will allow you to accept the default statements or substitute your own. If you choose the latter, only applicants from your institution will see the statements that you insert. Please note when you insert text in the two boxes, you may type in text directly or you may paste in unformatted text and then use our editing tools to format your text. ***Do not paste pre-formatted text into the box. The formatting will be lost if you do.***

Applicants are asked to sign electronically a FERPA statement for each letter. They are presented with the options of waiving or not waiving their rights to see the letter. You may choose to use the default statement. In that case, do not make changes in this box and this is the text that will appear to your applicants. Some institutions prefer or require that an institutionally approved standard FERPA statement be used. You may delete the default FERPA statement and replace it with one of your choosing.

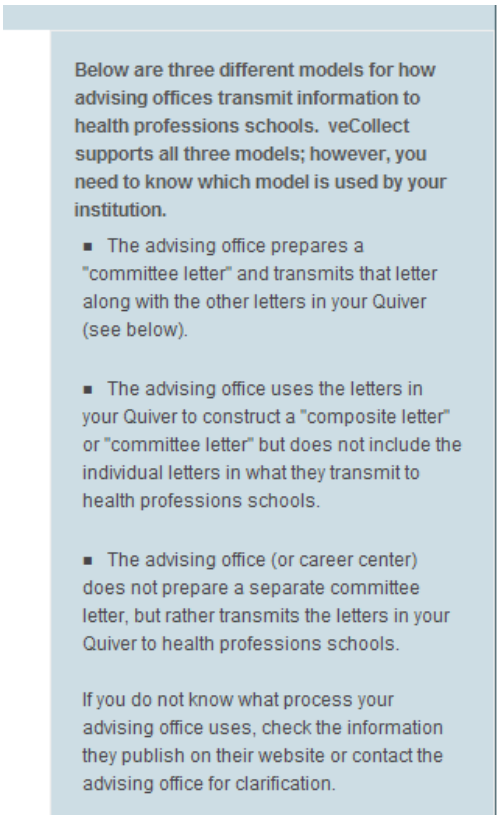


We are sure you have made it abundantly clear to your applicants what your requirements and/or guidelines are for letters that are processed through your office. However, here is one more chance to provide that information to applicants. Applicants will be presented with a link that opens a box showing your specific guidelines. The next figure shows the box you can use to insert your specific letter guidelines. If you choose not to insert your own text, the text you see in the next figure will appear when your applicants click on the “letter guidelines” link.



What should you include here? They need to know what you actually transmit to health professions programs. We have described for them three general types of letter process (see below) and told them they need to know which approach you use.

As you can see in the figure below, we tell them if they don't know what process you use, they should contact you. So, if you put the info into your letter guidelines that may cut down on calls or emails to your office.



Below are three different models for how advising offices transmit information to health professions schools. veCollect supports all three models; however, you need to know which model is used by your institution.

- The advising office prepares a "committee letter" and transmits that letter along with the other letters in your Quiver (see below).
- The advising office uses the letters in your Quiver to construct a "composite letter" or "committee letter" but does not include the individual letters in what they transmit to health professions schools.
- The advising office (or career center) does not prepare a separate committee letter, but rather transmits the letters in your Quiver to health professions schools.

If you do not know what process your advising office uses, check the information they publish on their website or contact the advising office for clarification.

You may also want to alert them to any deadlines in your office that relate to letters. You may want to provide any information on specific limitations on letters or requirements for letters processed by your office. Do you require a certain number, limit letters to a certain number? Do you require a specific distribution, e.g., science faculty/instructors? Reiterate those requirements here. Are there other steps they must take in order to have their letters processed by your office? Cover them here.

It is inevitable that some letters will be sent to your office in hard copy. Applicants need to know if that happens that you can upload the letters to veCollect. We recommend that they create an evaluator record and letter record for every evaluator from whom they expect a letter—even if that letter has already been received in your office. It should not be necessary for the applicant to go back to ask that evaluator to do anything else, e.g., complete a form, re-send the letter. You as the advisor can post that letter to veCollect and the applicant will be able to track its receipt. See section 5.3 for specifics. So you should reiterate that they need to create an evaluator record and letter record for all evaluators who are writing (or have written) for them—even if those letters have been received. And if they are expecting a committee letter, they should list that as well.

Section 2. Who Creates Evaluator Records and Letter Records

There are two ways to handle this. You should decide how your office will handle it and inform your applicants.

a. **Applicants create records.** When veCollect was designed only applicants could create evaluator records and letter records. In cases where a letter had already been received in the advising office, it was necessary for the applicant to create an evaluator record and letter record for that letter before the advisor could upload the letter directly to veCollect as a .PDF. Our reasoning for that approach was the notion that the applicant should be the person to determine whose evaluation/recommendation he/she was requesting.

b. **Advisors create records.** While most, if not all, advisors agreed with the original approach, they also told us that in some cases it would make things smoother if advisors had the ability to create an evaluator record and letter record. (See Section 6)

Section 3. How will your applicants use veCollect?

Notes:

- If you have created your login and password on veCollect, please review the information under the "For Applicants" tab.
- To view the instructional videos showing applicants how to use veCollect, go to the For Advisors tab. There are links in the sidebar.
- To view (or download) a PowerPoint presentation of instructions for applicants, select the link below the figure on the Advisor Dashboard.

Applicants will use the link on your web site to access veCollect. If you have chosen to require them to enter an authorization code, you will need to provide them with the code. Please note you can change the code any time you wish to do so. When they register, they will "attach" themselves to your institution and enter basic information about themselves. If you elected to require that they have your approval, you will need to give them manual approval to register for VE. If you want an email prompt for this, you will need to tell the veCollect system whose email address to use for that. See Registration Settings in Section 1.5 above.

As part of the registration process, applicants will create a login and password for veCollect. They need to remember that login and password or make note of it in a safe place. They will not be sent the login and password in an email from veCollect. You have access to the logins for all of your applicants. You do not have access to their passwords. If they forget their login, you can provide it to them—making sure of course to only provide the login to the person to whom the account belongs. If they forget their password you can reset it for them. To do so, open up the applicant record; in the section with their information in it, click on the "send new password" link. A new password will be sent to the primary email address that they provided when they registered for veCollect.

Once the applicant has created his/her account on veCollect, he/she can begin using the system by entering the names and required information for each evaluator. The applicant will need to create an evaluator record and then a letter record for each evaluator.

Please review the Instructions for Applicants (see link on Advisor Dashboard).

Letters collected on veCollect can only be accessed by advisors in your office.

If the applicant wants to use different letters for different types of schools, that is possible. For example, if the applicant wants to send a different group of letters to MD schools and DO schools (he may want to include a letter from a DO in the letters he sends to DO schools), he will create 2 quivers – one for MD with the MD letters and one for DO with the DO letters.

Section 4. How will evaluators use veCollect?

Evaluators do not log into veCollect. Therefore you will not have to interface with evaluators to teach them how to use veCollect. We know you are happy to hear that. ☺

Letters are submitted as PDFs or MS Word documents sent via email attachment. After an applicant has made the request to the evaluator and ascertained that the evaluator will write a letter for him/her, the applicant will create an evaluator record and letter record for that letter. The applicant will address the FERPA waiver question for that letter record. Then, at the time he/she feels is appropriate, he/she will click on the email icon displayed for that letter.

An email will be sent from veCollect to the evaluator. We will use the email address provided by the applicant; however, we will randomly check email addresses and will be particularly careful if the address for an academic evaluation is not an .edu address.

The email message to the evaluator contains instructions on how to submit a letter to veCollect to be available to you, the advisor. And the email indicates whether or not the applicant has waived his/her right to see the letter. Again, we stress that the letter should be on letterhead with signature. We provide a link to instructions on how to do that. And we clearly state that the format of the attachment must be a .PDF, .DOC, or .DOCX (the latter 2 being MS Word documents). The wording of this instructional email cannot be changed. However, you may choose to send additional instructions or forms as email attachments to the standard veCollect instructions (see section 1.7).

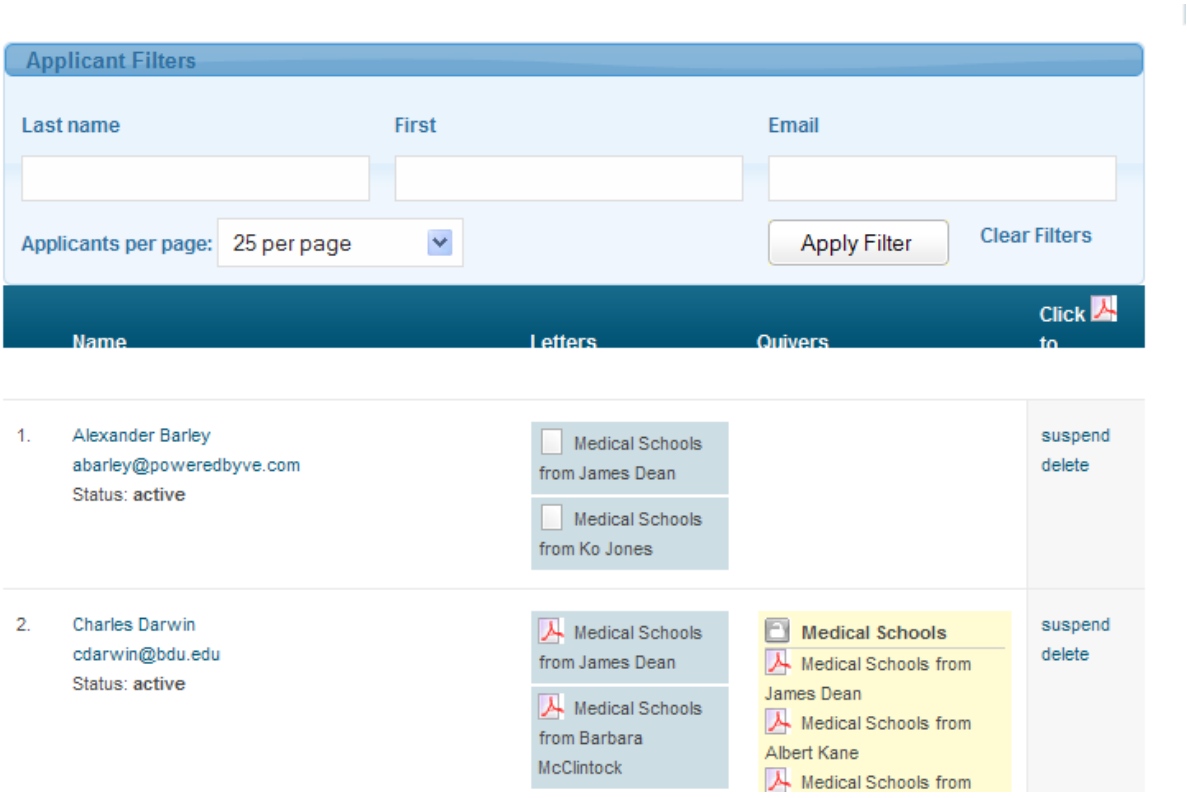
It is important to note that the email sent from veCollect to the evaluator is specific for the particular applicant letter record. It contains a code that assists us in matching the letter to the correct applicant. Thus the evaluator should be careful to reply to the correct email when transmitting a letter to veCollect.

Once the evaluator submits the letter via email, it is converted to .pdf (if necessary) and it is matched to the applicant record on veCollect and available to you. Both you and the applicant can track receipt of the letter via display of a pdf icon in the evaluator record.

Please note that the matching process is not instantaneous. Attachments are screened before the match is finalized and only after that step will the evaluator receive an email confirming receipt. The two most common issues that delay matching are (1) an evaluator sending a letter in a non-acceptable format (e.g. image files such as .jpg or .gif) and (2) an evaluator attaching a letter for student A to the email specific for student B.

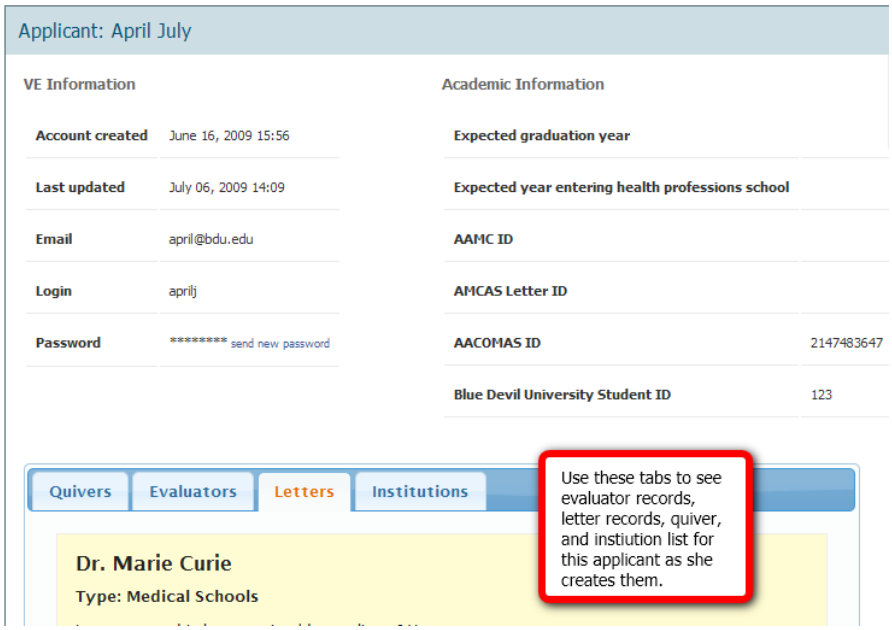
Section 5. Once applicants begin creating records and listing evaluators on veCollect, what will advisors do?

5.1 Once your applicants start creating applicant records, you can follow their progress and the receipt of their letters on veCollect. Just log into veCollect and go to the Applicants tab from the Advisor Dashboard.



Please note you do not have to scroll through all of your applicants. You can filter for the particular applicant for whom you are searching. From the list, you will be able to view quickly whether the applicant has created evaluator records, letter records, and quivers. If a letter has been received, you will see the Adobe icon next to the letter record, allowing you to track at a glance to progress of the applicant with regard to which letters have been received.

5.2 To see further details of the applicant record, click on the applicant name.

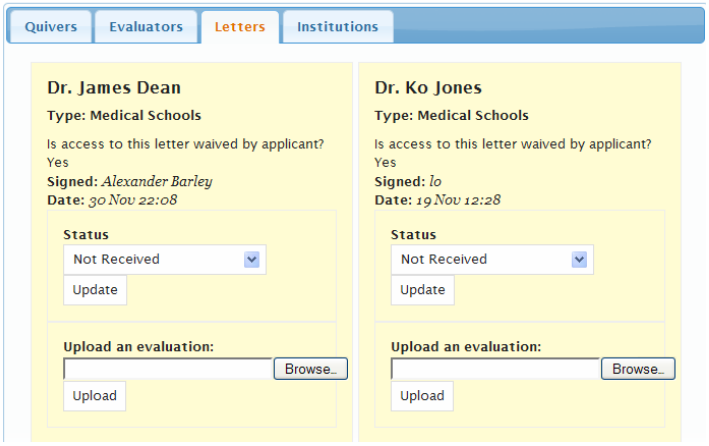


From this screen you can do the following:

- Use the tabs to view the evaluator records, letter records, quivers and institution list as the applicant completes them.
- If the applicant cannot remember his/her login and/or password, you can provide the login to him/her (be careful only to provide the login to the appropriate person) and you can use the "send new password" link to send a new password to the email that applicant provided to veCollect. The applicant can then change that password if he/she wishes.
- The applicant is supposed to enter his/her ID's into veCollect; if he/she does they will appear on this screen.

5.3 What should you do if you have already received letters from evaluators for your applicants or if you receive letters from evaluators? We realize that you likely already have on file letters for some of your applicants. And there will no doubt be cases of evaluators who mail the letters to you rather than use the email process for veCollect. So we built into veCollect a way for you to get those letters into the veCollect system so that your applicants can track their receipt.

You can upload the letter directly if you have it in PDF format. Open the applicant record and go to the "Letters" tab as seen in the figure below.

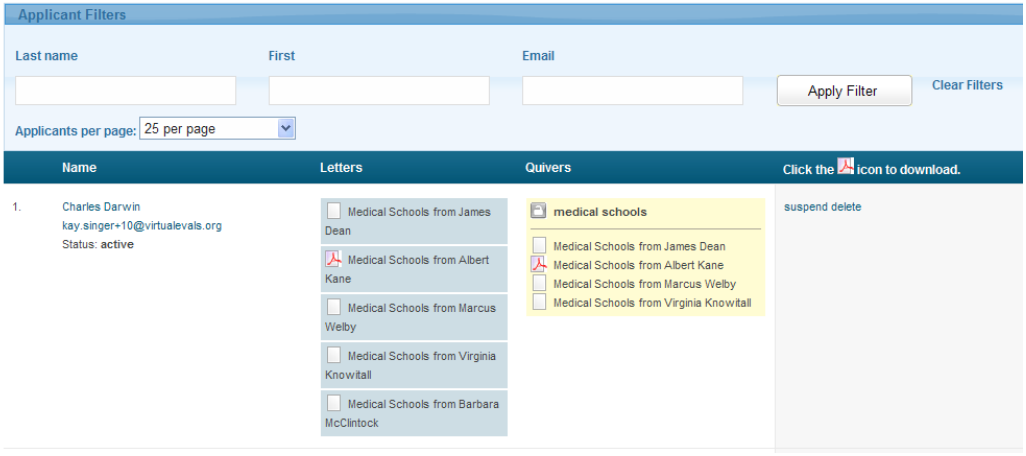


Let's say you have received a letter from Dr. James Dean for applicant Alexander Barley. Convert the letter to PDF and you can upload it directly to veCollect. Note: any document you upload directly to a letter record must be in PDF format.

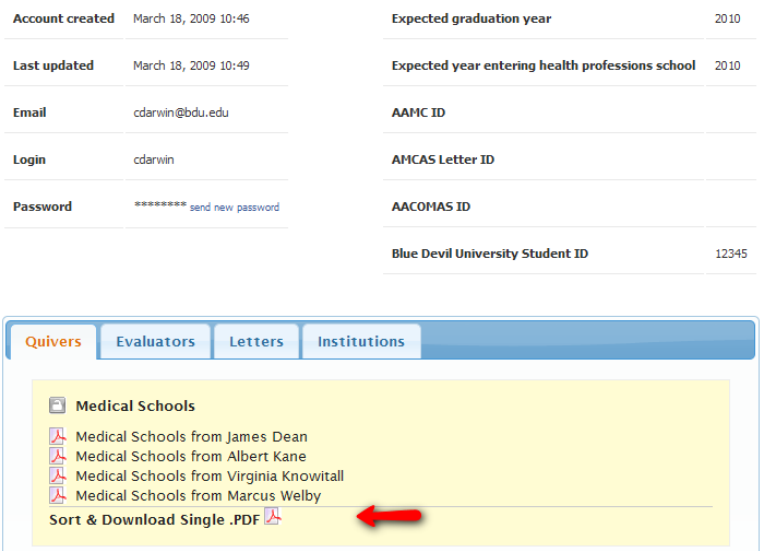
Click on Browse and find the letter in a folder where you stored it on your computer in PDF format. Select it. Then click on "Upload." When a letter is received, the Adobe Acrobat icon is displayed.

5.4 Uploading your committee letter to veCollect. When you are ready to submit your committee letter to veCollect, you can do that by uploading it directly as a .pdf using the instructions above. Please note, in order for you to upload your committee letter to veCollect, you will need to instruct your applicants to create an evaluator record and a letter record for the committee letter or your advising office will need to create the evaluator record and letter record.

5.5 Displaying a Quiver. Once an applicant has created a quiver, it will display in the Applicant Details screen. You can follow the receipt of the letters he/she is expecting to use in the Quiver (the finalized group of letters he/she wants to use to support his/her application).

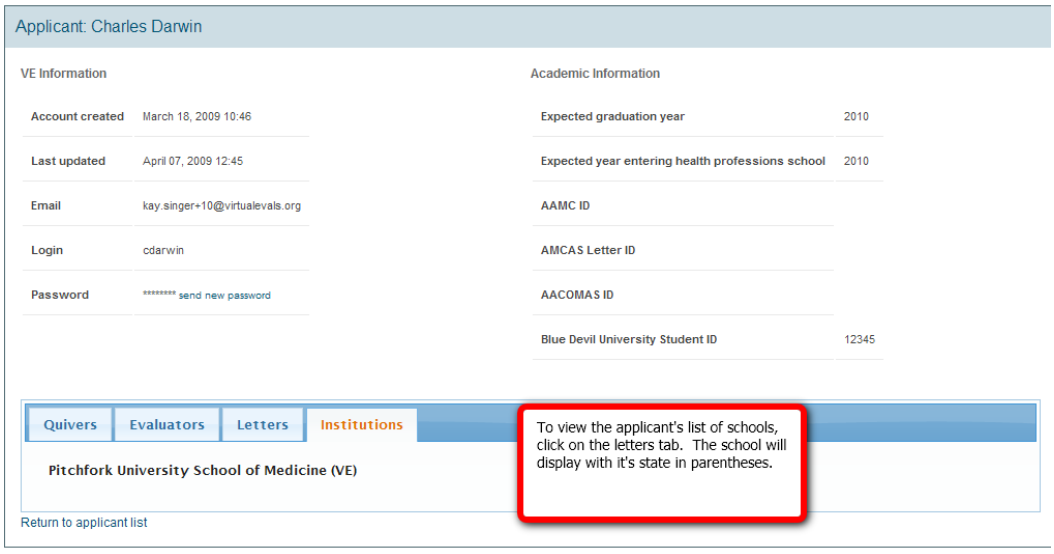


You can download a single letter from either the Letters list or the list in the Quiver. You also have the option of downloading all letters in a Quiver as a single PDF - which you can then upload to application services such as AADSAS, or print in order to mail.



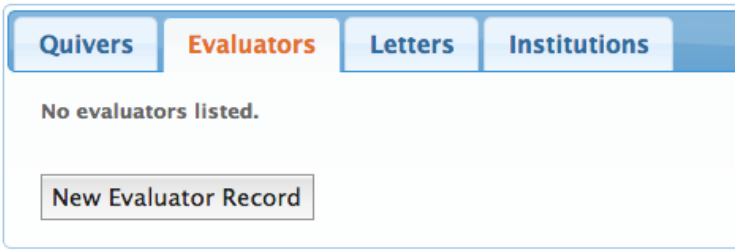
Please note: When you "download" a letter from veCollect, the letter stays on the veCollect server. You are simply opening the letter to view it, print it, or save a copy to another place.

5.6 Viewing the institution list. You can view the list of schools to which the applicant is applying from the institutions tab under the applicant details.

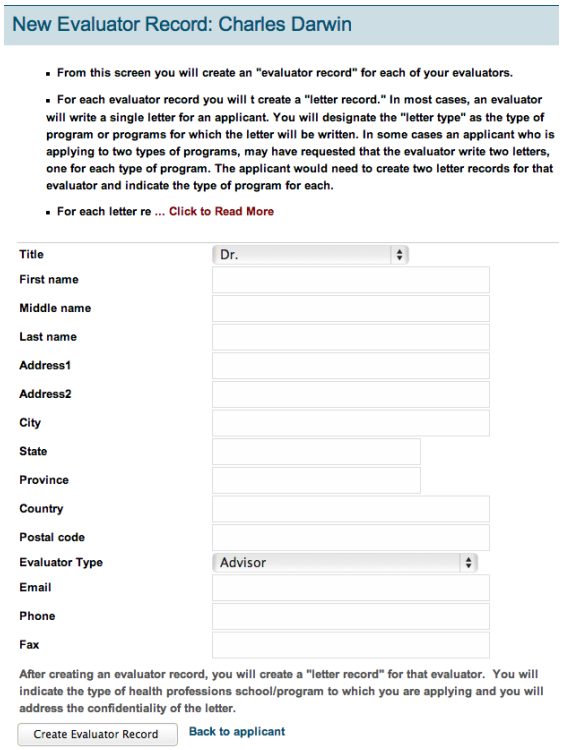


Section 6: Creating Evaluator Records and Letter Records for Applicants.

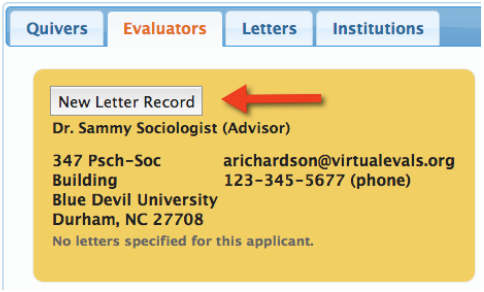
While viewing the applicant record, select the “Evaluators” Tab.



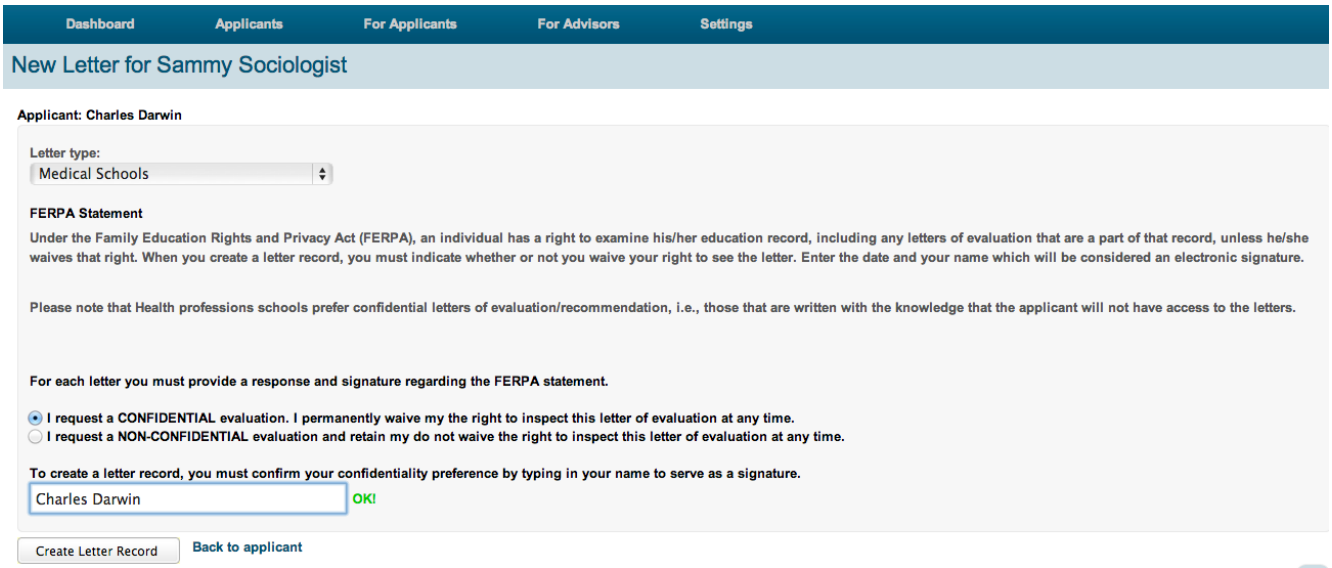
Select “New Evaluator Record” and enter the evaluator information or, if this record will be used by your office to collect other documents, you may make up information for a “dummy” evaluator (see below under letter record).



You will now see your new evaluator under the “Evaluators” tab. Select “New Letter Record.”



Select the letter type from the drop-down list and make a FERPA selection. You will now see your Letter Record under the “Letters” tab.



And that is veCollect!

We welcome any feedback on the system or on improvements to the instructions.

As of June 2019, we are in the final stages of development of a new version of veCollect. We will begin rolling over schools one at a time to the new version beginning in January 2020. We will contact your office to set up a time and date to start the transition. Don’t worry – the new version will be much easier to use and the instructions will be about half as long!

Please make sure anyone who will be using veCollect from the advisor side follows these instructions. But do not make these instructions available to applicants.

We have created a separate set of instructions for the applicants.

If you have any questions, please contact help@virtualevals.org