

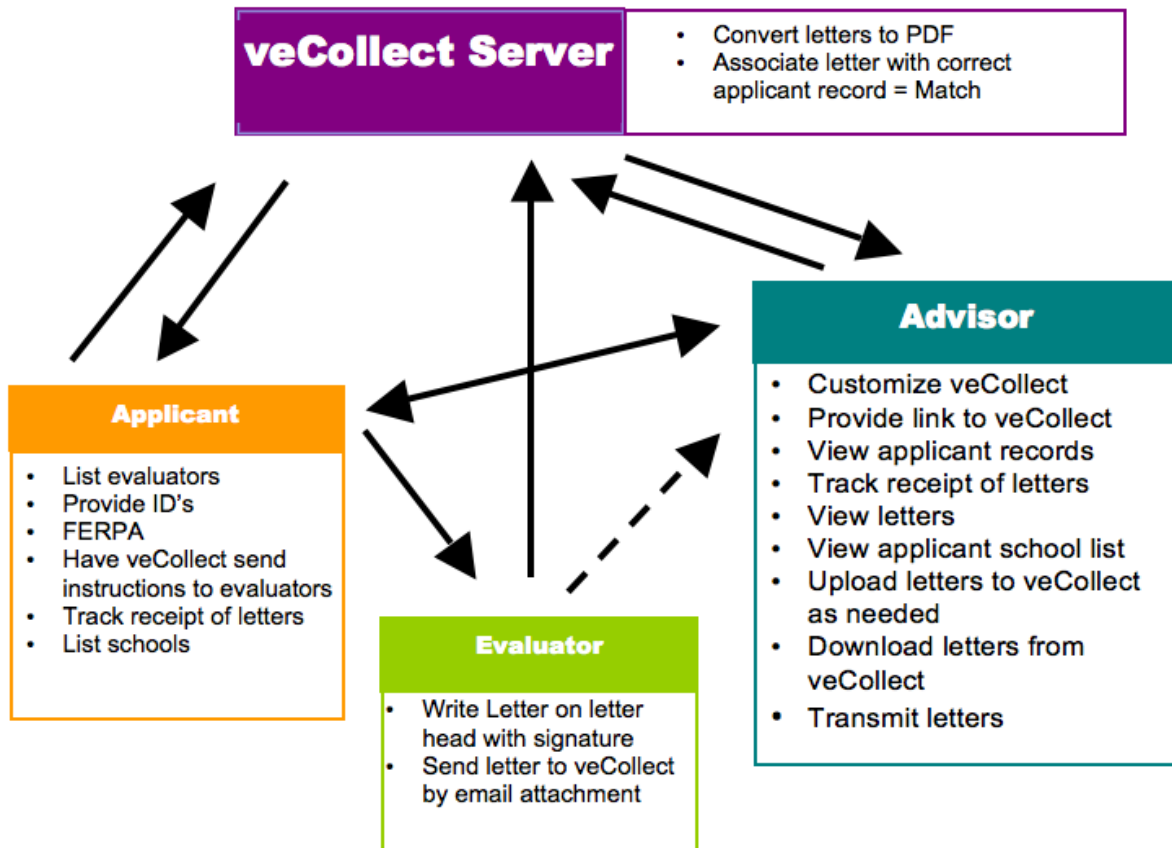
# Welcome to veCollect

<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](mailto: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](mailto: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.

The screenshot shows the veCollect website. At the top, there is a green header with the text "veCollect preview version" on the left and "Login to veCollect | Register for access" on the right. Below the header is a navigation bar with "Home" and "About veCollect" links. A red box highlights the "Login to veCollect | Register for access" link, with an arrow pointing to it and the text "Select either login link". Below the navigation bar is a "Welcome to veCollect" section. The main content area contains several paragraphs of text. A red arrow points from the "Select either login link" box to a "Getting Started" sidebar on the right. The sidebar contains the following text: "Getting Started", "Are you an applicant? Click here to register for veCollect access!", "Are you returning? Login to your account.", "veCollect is available to applicants whose advisors have registered for veCollect Service. If you are unsure, check with your advisor to see if you are eligible to use veCollect.", "We have created instructional videos to help you use veCollect. Where available, links to the videos will appear in orange.", and "Video: Registering for an applicant account on veCollect".

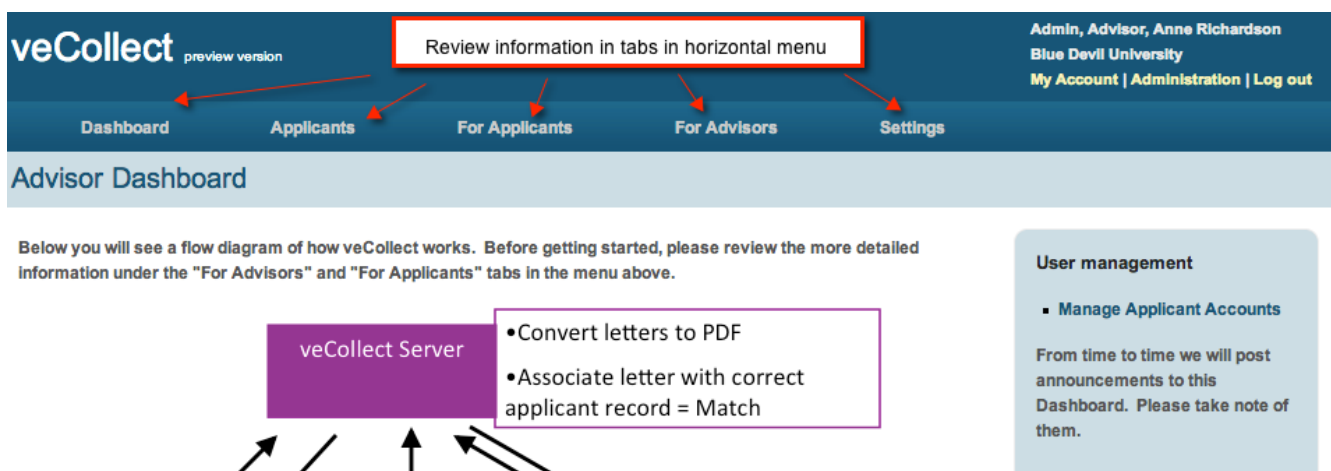
⇒ Select one of the two links to log into your account.

⇒ 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.

The screenshot shows the 'My Profile' page in the veCollect system. At the top, the header includes the 'veCollect' logo, a 'preview version' label, and user information: 'Admin, Advisor, Anne Richardson', 'Blue Devil University', and links for 'My Account | Administration | Log out'. Below the header is a horizontal menu with tabs: 'Dashboard', 'Applicants', 'For Applicants', 'For Advisors', and 'Settings'. The main content area is titled 'My Profile' and contains two sections: 'Login Details' and 'Account Details'. The 'Login Details' section is a table with the following information: Login: arichardson; Email: arichardson@virtualevals.org; Password: \*\*\*\*\* change (with a red arrow pointing to the word 'change'); Account created: June 18, 2010 12:40; Last updated: September 14, 2010 22:02. The 'Account Details' section shows: First Name: Anne; Middle Name: (empty); Last Name: Richardson; and a link 'Click to update my account details.' (with a red arrow pointing to the link).

**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:

**veCollect** preview version

Dashboard Applicants For Applicants For Advisors **Settings**

### Blue Devil University Settings

Below are links to the areas of veCollect for which you can control your institutional settings. For brief videos on how to use these settings, see the links in the sidebar. Any changes to these settings should be made only by the person designated as the primary veCollect contact at your institution.

- General Information for Blue Devil University [1.4](#)
- Manage Advisors for Blue Devil University [1.9](#)
  - Create New Advisors for Blue Devil University [1.9](#)
- View/Change Registration Settings [1.5](#)
- View/Change Advisors' Email Notification Preferences [1.6](#)
- View/Change Evaluator Email Attachments [1.7](#)
- View/Change Institution Content [1.10](#)
  - Preview Institutional Content [1.10](#)
- Subscription & Payment Options [1.8](#)
  - My Institution's Payment Options
  - My Institution's Active Subscription

**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.

Dashboard Applicants For Applicants For Advisors Settings

### General Information for Blue Devil University

General Settings were last updated on December 22, 2009 08:56.

Address1  
456 Saint St

Address2  
Box 456

City  
Clarkson

State  
VE

Postal code  
23453

Phone  
555-245-2387

Fax

Institutional Email Address  
admissions@bdu.edu

Update Institution Details Cancel

**General Information**

**Manage Advisors**

- Create New Advisors for Blue Devil University

**View/Change Registration Settings**

**View/Change Institution Content**

- Preview Institutional Content

**View/Change Second Page Cover Sheet**

- Preview Second Page Cover Sheet

**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:

Blue Devil University Registration Settings

System Content was last updated by Monica Seles on February 23, 2010 13:49.

On what date should registration end for Blue Devil University. Applicants will not be able to register past this deadline.

2010-04-01

Require applicant authorization code

☐ Yes, require the authorization code when applicants register for my institution.

☒ No, do not require the authorization code for registering.

Applicant authorization code

Applicants will need to enter this authorization code in order to access the registration form.

barack&hilary

General Information

Manage Advisors

- Create New Advisors for Blue Devil University

View/Change Registration Settings

View/Change Institution Content

- Preview Institutional Content

**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.

#### Require manual activation

You can either allow your applicants to have their accounts automatically activated or only allow activation by manually "clicking to activate" them.

- ☒ **Manual Activation - My institution will manually accept applicants by hand.**  
☐ **Automatic Activation - Allow VE Collect to automatically make accounts active after registration. This will require applicants to click a link they receive in the email.**

The following persons have access to your institution's Advisor Account. Select the person(s) who should receive an email prompt when applicants attempt to register. That person will need to manually activate the applicant account. If none are selected, no one from your institution will receive email prompts. In that case, you would need to monitor the site regularly to check for applicant's whose accounts need to be activated.

- |                                        |                                                |                                         |
|----------------------------------------|------------------------------------------------|-----------------------------------------|
| <input type="checkbox"/> Robin Nest    | <input type="checkbox"/> Anne Richardson       | <input type="checkbox"/> Saeed Sample1  |
| <input type="checkbox"/> Saeed Sample2 | <input type="checkbox"/> Saeed Sample3         | <input type="checkbox"/> Jason Seifer   |
| <input type="checkbox"/> Monica Seles  | <input checked="" type="checkbox"/> Kay Singer | <input type="checkbox"/> kay.youknowwho |

[Update Registration Information](#)

[Back](#)

[View/Change Second Page Cover Sheet](#)

■ [Preview Second Page Cover Sheet](#)



## 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.

veCollect

preview version

Admin, Advisor, Anne Richardson  
Blue Devil University  
[My Account](#) | [Administration](#) | [Log out](#)

Dashboard
Applicants
For Applicants
For Advisors
Settings

Advisor Notifications

Select the appropriate settings for each individual from your institution. Click the update button to save preferences.

Name	Email	Applicant Registration	Letters Matched & Evaluators Notified
Monica Seles	kay.singer+20@virtualevals.org	No ▾	No ▾
Kay Singer	kay.singer+admin@virtualevals.org	Yes ▾	Yes ▾
kay.youknowwho	kay.singer+adv1@virtualevals.org	No ▾	No ▾

Update Notifications

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.”

veCollect preview version

Admin, Advisor, Anne Richardson  
Blue Devil University  
My Account | Administration | Log out

Dashboard Applicants For Applicants For Advisors Settings

Evaluator Email Attachments [Add New Email Attachment](#)

This page allows you to specify a file that will automatically be included as an attachment in the initial email sent to evaluators. If the file is purely informational, it can be an MS Word document or a PDF. If you are asking that the document be returned to you, the file must be a Word Document, i.e., a .doc or .docx file.

Name	Type	Size	Updated On	Updated By	
1. you're booked! _ Budget_AZ.pdf	application/pdf	112.6 KB	25 Mar 16:04	Monica Seles	Delete

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

veCollect preview version

Admin, Advisor, Anne Richardson  
Blue Devil University  
My Account | Administration | Log out

Dashboard Applicants For Applicants For Advisors Settings

New Email Attachment

This page allows you to specify a file that will automatically be included as an attachment in the initial email sent to evaluators. If the file is purely informational, it can be an MS Word document or a PDF. If you are asking that the document be returned to you, the file must be a Word Document, i.e., a .doc or .docx file.

[Choose File](#) No file chosen

[Upload Attachment](#) [Cancel](#)

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



✓ EvaluatorAttachment was successfully created.

This page allows you to specify a file that will automatically be included as an attachment in the initial email sent to evaluators. If the file is purely informational, it can be an MS Word document or a PDF. If you are asking that the document be returned to you, the file must be a Word Document, i.e., a .doc or .docx file.

Name	Type	Size	Updated On	Updated By	
1. Standard Texts.docx	application/vnd.openxmlformats-officedocument.wordprocessingml.document	112.5 KB	04 Apr 03:51	Anne Richardson	Delete
2. you're booked! _ Budget_AZ.pdf	application/pdf	112.6 KB	25 Mar 16:04	Monica Seles	Delete

### 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.

Dashboard
Applicants
For Applicants
For Advisors
Settings

### Payment Options for Blue Devil University

Are you currently using veClient? (veClient is a separate application.) ☒ Yes

☒ **Institution Pays veCollect**

In this option, the institution purchases an annual subscription to veCollect based on the number of applicant records expected for the year. The subscription can be paid in full when your institution initially signs up for veCollect services. Alternatively, the annual subscription can be paid in monthly installments; however, please note that it is an annual subscription and you agree to pay the full annual fee.

☐ **Applicant Pays veCollect**

If you select this option, you will create an institutional account on veCollect. However, your institution will not purchase an annual subscription to veCollect. Rather, when an applicant registers to use your institution's veCollect account, the applicant must pay an annual fee of \$20 directly to veCollect. Note: Applicants can only use veCollect if their advisors have agreed to establish an institutional veCollect account.

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.	<input type="radio"/>	\$250
Store up to 50 active applicants.	<input type="radio"/>	\$500
Store up to 75 active applicants.	<input type="radio"/>	\$750
Store up to 100 active applicants.	<input type="radio"/>	\$1000
Store up to 150 active applicants.	<input type="radio"/>	\$1500
Store up to 200 active applicants.	<input type="radio"/>	\$2000
Store up to 250 active applicants.	<input type="radio"/>	\$2500
Store up to 300 active applicants.	<input type="radio"/>	\$3000
Store up to 400 active applicants.	<input type="radio"/>	\$4000
Store up to 500 active applicants.	<input type="radio"/>	\$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.

veCollect preview version 1

Dashboard	Applicants	For Applicants	For Advisors	Settings
New Advisor				
Items with an asterisk (*) are required.				
*First name	<input type="text"/>			
Middle name	<input type="text"/>			
*Last name	<input type="text"/>			
*Email	<input type="text"/>			
Secondary email	<input type="text"/>			
*Login	<input type="text"/>			
*Password	<input type="text"/>			
*Password confirmation	<input type="text"/>			
<input type="button" value="Create new advisor"/>				

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.

Dashboard	Applicants	For Applicants	For Advisors	Settings
-----------	------------	----------------	--------------	----------

<p>Advisors for Blue Devil University</p> <p>Below you will see listed those individuals from your institution who have advisor accounts on veCollect. You can view the status of each and the login for each advisor account. If an advisor forgets his/her password, you can use the “send new password” link. When you click on that link, a new password will be sent to the email address provided by the advisor when the account was created. He/she can then log in with that password and change it to something he/she prefers.</p> <p>4 Total.</p> <table> <tr> <th>Name</th><th>Email</th><th>Login</th><th>Status</th><th colspan="2"></th></tr> <tr> <td>1. kay youknowwho</td><td>kay.singer+adv1@virtualevals.org</td><td>kadvisor</td><td>deleted</td><td>Send New Password</td><td></td></tr> <tr> <td>2. Kay Singer</td><td>kay.singer+admin@virtualevals.org</td><td>ksinger</td><td>active</td><td>Send New Password</td><td>suspend delete</td></tr> <tr> <td>3. James Blue</td><td>kay.singer@gmail.com</td><td>advisor</td><td>active</td><td>Send New Password</td><td>suspend delete</td></tr> <tr> <td>4. Monica Seles</td><td>kay.singer+20@virtualevals.org</td><td>mseles</td><td>active</td><td>Send New</td><td>suspend</td></tr> </table>						Name	Email	Login	Status			1. kay youknowwho	kay.singer+adv1@virtualevals.org	kadvisor	deleted	Send New Password		2. Kay Singer	kay.singer+admin@virtualevals.org	ksinger	active	Send New Password	suspend delete	3. James Blue	kay.singer@gmail.com	advisor	active	Send New Password	suspend delete	4. Monica Seles	kay.singer+20@virtualevals.org	mseles	active	Send New	suspend
Name	Email	Login	Status																																
1. kay youknowwho	kay.singer+adv1@virtualevals.org	kadvisor	deleted	Send New Password																															
2. Kay Singer	kay.singer+admin@virtualevals.org	ksinger	active	Send New Password	suspend delete																														
3. James Blue	kay.singer@gmail.com	advisor	active	Send New Password	suspend delete																														
4. Monica Seles	kay.singer+20@virtualevals.org	mseles	active	Send New	suspend																														

**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.

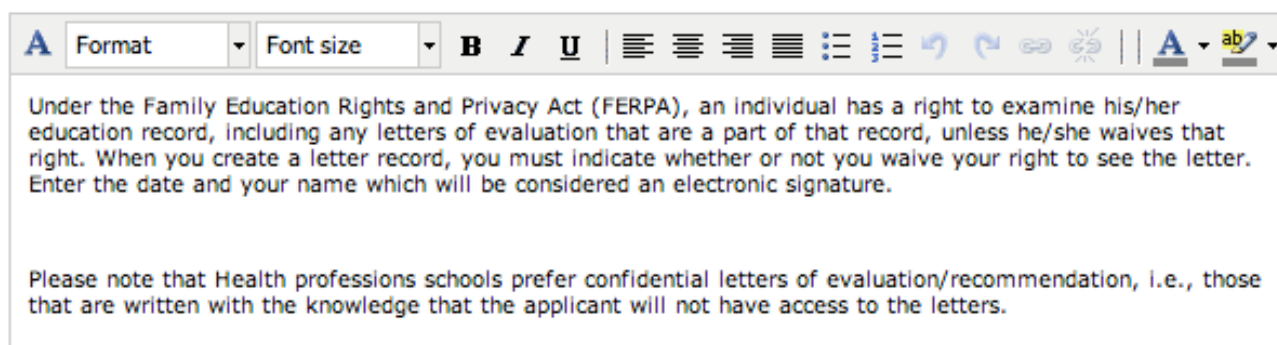
**1.10 View/Change Institution Content.** This exciting feature of veCollect makes it possible for your applicants to see in veCollect content that is specific to your institution’s letter process. We strongly recommend that you use the feature to insert your own letter guidelines. You can either accept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

#### Ferpa statement

*The FERPA statement is displayed each time an applicant creates a letter record. Applicants are then presented with the option of whether or not to waive their rights to inspect the letter.*



The screenshot shows a text editor interface for the FERPA statement. At the top, there is a toolbar with various formatting options: a large 'A' icon, a 'Format' dropdown, a 'Font size' dropdown, and buttons for bold (B), italic (I), underline (U), bulleted list, numbered list, decrease indent, increase indent, link, unlink, and a 'Show/Hide' icon. Below the toolbar, the text area contains the following text:

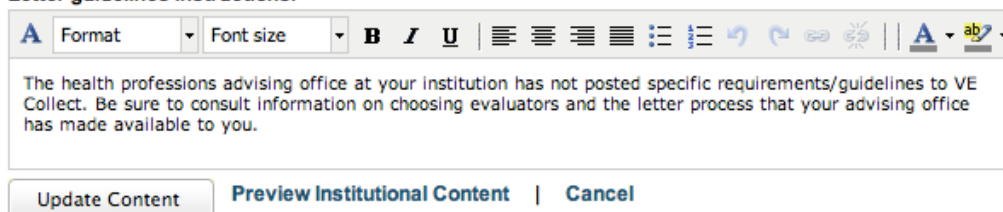
Under the Family Education Rights and Privacy Act (FERPA), an individual has a right to examine his/her education record, including any letters of evaluation that are a part of that record, unless he/she waives that right. When you create a letter record, you must indicate whether or not you waive your right to see the letter. Enter the date and your name which will be considered an electronic signature.

Please note that Health professions schools prefer confidential letters of evaluation/recommendation, i.e., those that are written with the knowledge that the applicant will not have access to the letters.

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.

#### Letter guidelines

##### **Letter guidelines instructions.**



The screenshot shows a text editor interface for the Letter guidelines instructions. It features the same toolbar as the FERPA statement editor. The text area contains the following text:

The health professions advising office at your Institution has not posted specific requirements/guidelines to VE Collect. Be sure to consult information on choosing evaluators and the letter process that your advising office has made available to you.

Below the text area, there are three buttons: 'Update Content', 'Preview Institutional Content', and 'Cancel'.

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.

Applicant Filters

Last name








First

Email

Applicants per page: 25 per page

Apply Filter

Clear Filters

Name	Letters	Quivers	Click  to
1. Alexander Barley abarley@poweredbyve.com Status: active	<div><div><input type="checkbox"/> Medical Schools from James Dean</div><div><input type="checkbox"/> Medical Schools from Ko Jones</div></div>		suspend delete
2. Charles Darwin cdarwin@bdu.edu Status: active	<div><div> Medical Schools from James Dean</div><div> Medical Schools from Barbara McClintock</div></div>	<div><div> Medical Schools</div><div> Medical Schools from James Dean</div><div> Medical Schools from Albert Kane</div><div> Medical Schools from</div></div>	suspend delete

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.

Applicant: April July

VE Information		Academic Information	
Account created	June 16, 2009 15:56	Expected graduation year	
Last updated	July 06, 2009 14:09	Expected year entering health professions school	
Email	april@bdu.edu	AAMC ID	
Login	aprilj	AMCAS Letter ID	
Password	***** <a href="#">send new password</a>	AACOMAS ID	2147483647
		Blue Devil University Student ID	123

Quivers Evaluators **Letters** Institutions

Dr. Marie Curie  
Type: Medical Schools

Use these tabs to see evaluator records, letter records, quiver, and institution list for this applicant as she creates them.

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.

The screenshot shows the 'Letters' tab with two letter records. Each record has the following fields: Name (Dr. James Dean / Dr. Ko Jones), Type (Medical Schools), Is access to this letter waived by applicant? (Yes), Signed (Alexander Barley / Io), Date (30 Nov 22:08 / 19 Nov 12:28), Status (Not Received), and an Upload section with a 'Browse...' button and an 'Upload' button.

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).

The screenshot shows the 'Applicant Filters' section with input fields for Last name, First, and Email, and an 'Apply Filter' button. Below this is the 'Applicant Details' section for Charles Darwin (kay.singer+10@virtualevals.org, Status: active). It displays a list of letters and quivers. The 'Letters' column lists medical schools from James Dean, Albert Kane, Marcus Welby, Virginia Knowitall, and Barbara McClintock. The 'Quivers' column shows a 'medical schools' quiver containing letters from James Dean, Albert Kane, Marcus Welby, and Virginia Knowitall. A 'suspend delete' link is visible next to the quiver.

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.

<b>Account created</b>	March 18, 2009 10:46	<b>Expected graduation year</b>	2010
<b>Last updated</b>	March 18, 2009 10:49	<b>Expected year entering health professions school</b>	2010
<b>Email</b>	cdarwin@bdu.edu	<b>AAMC ID</b>	
<b>Login</b>	cdarwin	<b>AMCAS Letter ID</b>	
<b>Password</b>	***** send new password	<b>AACOMAS ID</b>	
		<b>Blue Devil University Student ID</b>	12345

Quivers
Evaluators
Letters
Institutions

**Medical Schools**

- Medical Schools from James Dean
- Medical Schools from Albert Kane
- Medical Schools from Virginia Knowlton
- Medical Schools from Marcus Welby

Sort & Download Single .PDF

**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.

Applicant: Charles Darwin

<b>VE Information</b>	<b>Academic Information</b>
<b>Account created</b> March 18, 2009 10:46	<b>Expected graduation year</b> 2010
<b>Last updated</b> April 07, 2009 12:45	<b>Expected year entering health professions school</b> 2010
<b>Email</b> kay.singer+10@virtualevals.org	<b>AAMC ID</b>
<b>Login</b> cdarwin	<b>AMCAS Letter ID</b>
<b>Password</b> ***** send new password	<b>AACOMAS ID</b>
	<b>Blue Devil University Student ID</b> 12345

Quivers
Evaluators
Letters
Institutions

Pitchfork University School of Medicine (VE)

To view the applicant's list of schools, click on the letters tab. The school will display with it's state in parentheses.

[Return to applicant list](#)

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

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

Quivers

Evaluators

Letters

Institutions

No evaluators listed.

New Evaluator Record

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).

### New Evaluator Record: Charles Darwin

- From this screen you will create an “evaluator record” for each of your evaluators.
- For each evaluator record you will create a “letter record.” In most cases, an evaluator will write a single letter for an applicant. You will designate the “letter type” as the type of program or programs for which the letter will be written. In some cases an applicant who is applying to two types of programs, may have requested that the evaluator write two letters, one for each type of program. The applicant would need to create two letter records for that evaluator and indicate the type of program for each.
- For each letter re ... [Click to Read More](#)

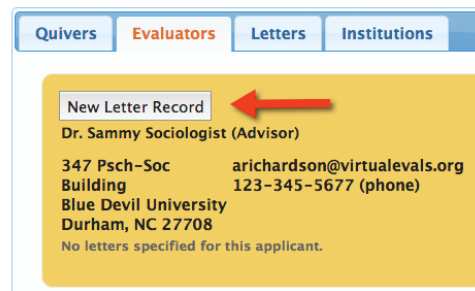
Title	Dr.
First name	
Middle name	
Last name	
Address1	
Address2	
City	
State	
Province	
Country	
Postal code	
Evaluator Type	Advisor
Email	
Phone	
Fax	

After creating an evaluator record, you will create a “letter record” for that evaluator. You will indicate the type of health professions school/program to which you are applying and you will address the confidentiality of the letter.

Create Evaluator Record

[Back to applicant](#)

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.

A screenshot of a web application form titled 'New Letter for Sammy Sociologist'. The form is divided into several sections. At the top, there is a navigation bar with tabs: 'Dashboard', 'Applicants', 'For Applicants', 'For Advisors', and 'Settings'. Below the navigation bar, the title 'New Letter for Sammy Sociologist' is displayed. The form contains the following fields and sections: 'Applicant: Charles Darwin', 'Letter type: Medical Schools' (a drop-down menu), 'FERPA Statement' (a text area with instructions), 'Please note that Health professions schools prefer confidential letters of evaluation/recommendation, i.e., those that are written with the knowledge that the applicant will not have access to the letters.', 'For each letter you must provide a response and signature regarding the FERPA statement.', 'I request a CONFIDENTIAL evaluation. I permanently waive my right to inspect this letter of evaluation at any time.' (a radio button), 'I request a NON-CONFIDENTIAL evaluation and retain my do not waive the right to inspect this letter of evaluation at any time.' (a radio button), 'To create a letter record, you must confirm your confidentiality preference by typing in your name to serve as a signature.', 'Charles Darwin' (a text input field), 'OK!' (a green button), 'Create Letter Record' (a button), and 'Back to applicant' (a button).

## 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](mailto:help@virtualevals.org)