

How to Finalize a Letter via a Workflow

CTMS v1.6

APPLICABLE TO

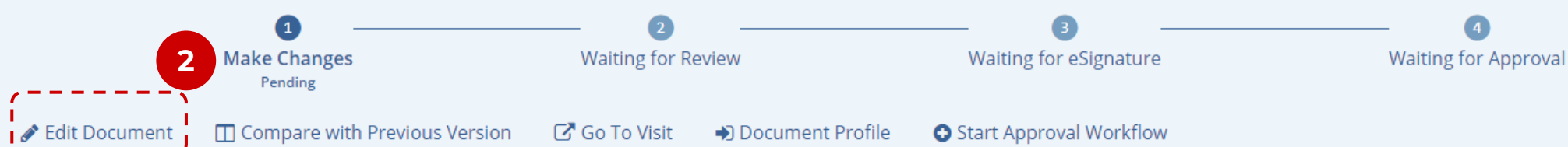
- CRA

- 1 Press **View Letter** to open the letter in a new tab.
- 2 The letter will open for review. Press **Edit Document** to begin reviewing and finalizing the letter.



OOTB_IMV_ConfLetter

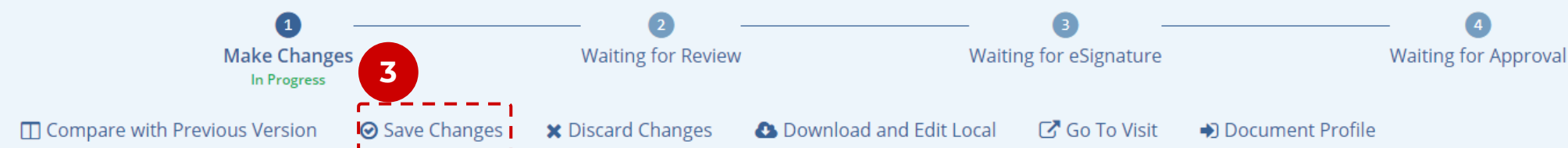
Monitoring Visit Confirmation Letter



- 3 Step 1 will now show as 'In Progress.' When you are sure that you are **completely** done making any and all changes to the document and it is ready for signature, press **Save Changes**.

OOTB_IMV_ConfLetter

Monitoring Visit Confirmation Letter



This will end the editing session and move the document and allow the user to send the document into the workflow for signature.

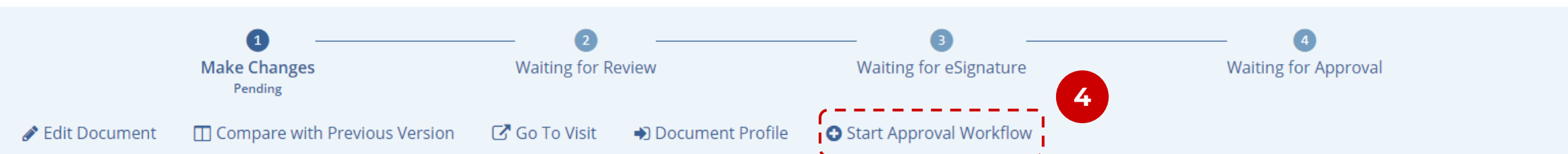
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4 Press **Start Approval Workflow**.

OOTB_IMV_ConfLetter

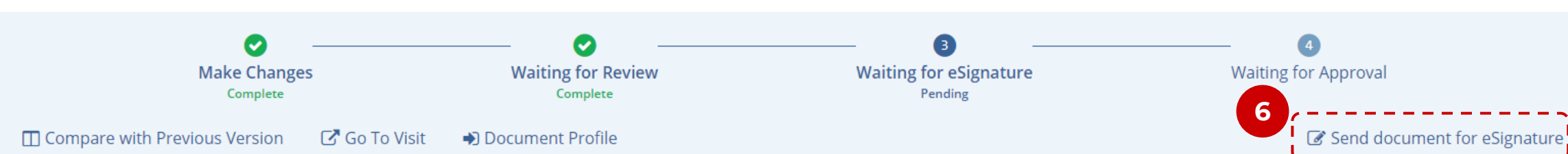
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5 Reload the page via your web browser if necessary. The workflow tracker at the top of the screen will show that the document is waiting for eSignature.

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6 Press **Send document for eSignature**.

7 When the 'Send for eSignature' window opens. Assign the 'Signer Role.'

1 columns 1 selected

<input checked="" type="checkbox"/>	Name	Signer Role	Title
<input checked="" type="checkbox"/>	CRA Three	Author	Author

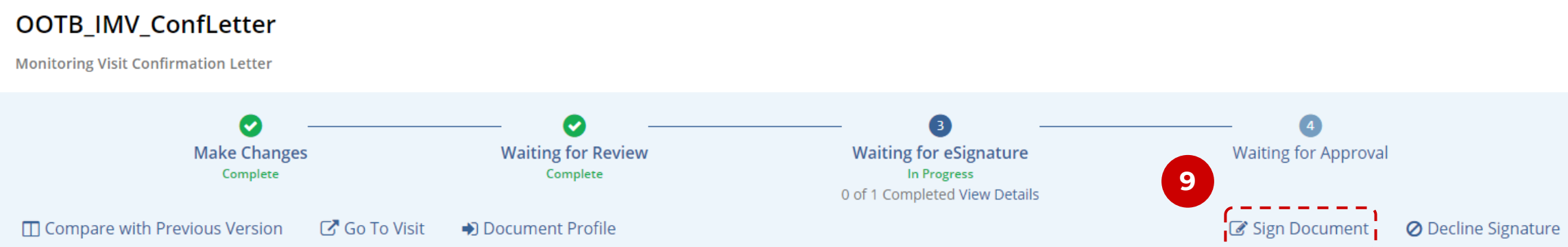
8 Press **OK** at the bottom of the window to send the document for signing.

Cancel OK

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9 The tracker at the top of the screen will change again to indicate that it is waiting for signatures to be completed. Press **Sign Document**.

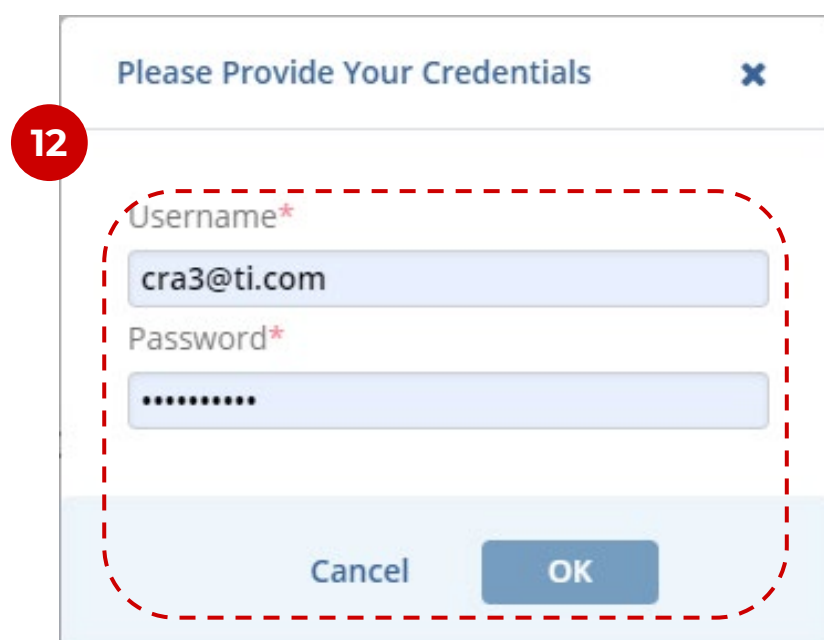


10 The 'Sign Document' window will appear. Provide a reason for signature.

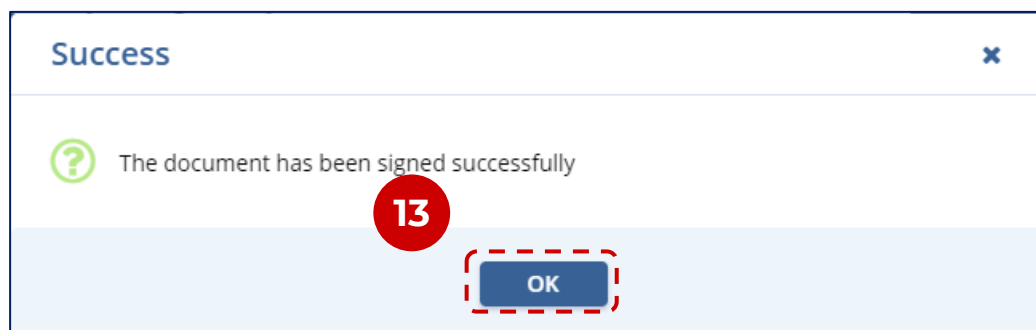
11 Press **Sign Document**.



12 A popup will appear asking for your credentials. Provide your credentials and press **OK**.



- 13 A popup window appears indicating that the document has been successfully signed. Press **OK**.



- 14 The process tracker will indicate that all stages have been completed. Reload the web page via your browser.

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Monitoring Visit Confirmation Letter

✓
Make Changes
Complete

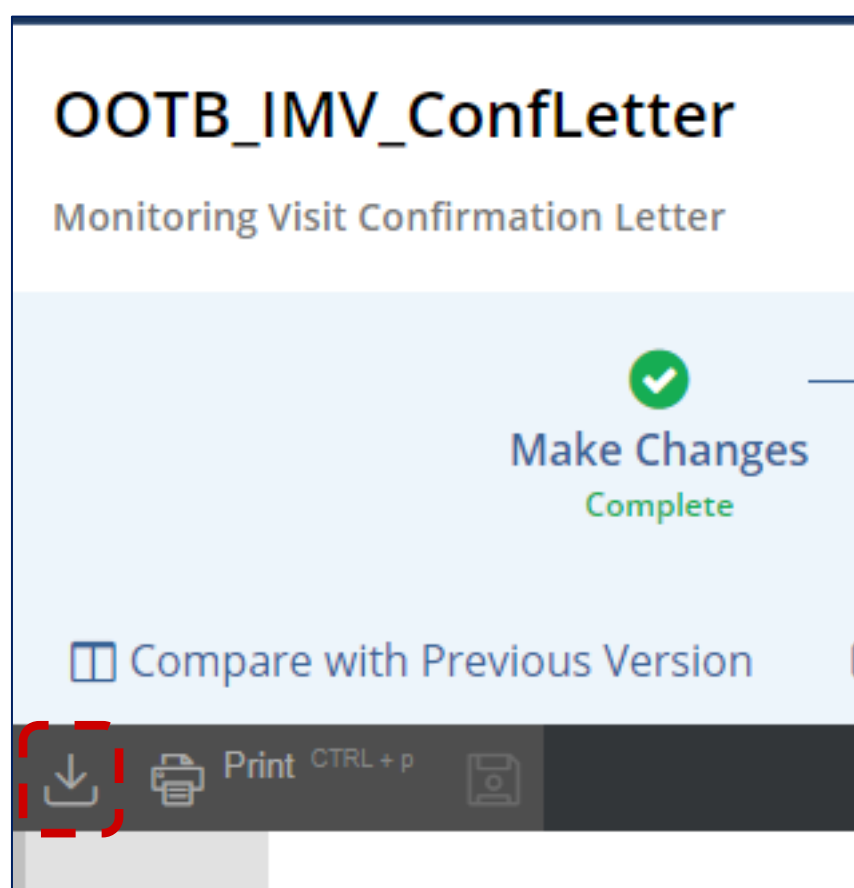
✓
Waiting for Review
Complete
CRA Three on 01 Jun 2024

✓
Waiting for eSignature
Complete

✓
Waiting for Approval
Approved
CRA Three on 01 Jun 2024

Compare with Previous Version Go To Visit Document Profile

- 15 Once the page has been reloaded, the user should be able to see the electronic signature on the document. If needed the document can be downloaded via the download button at the top-left of the document viewer.



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