

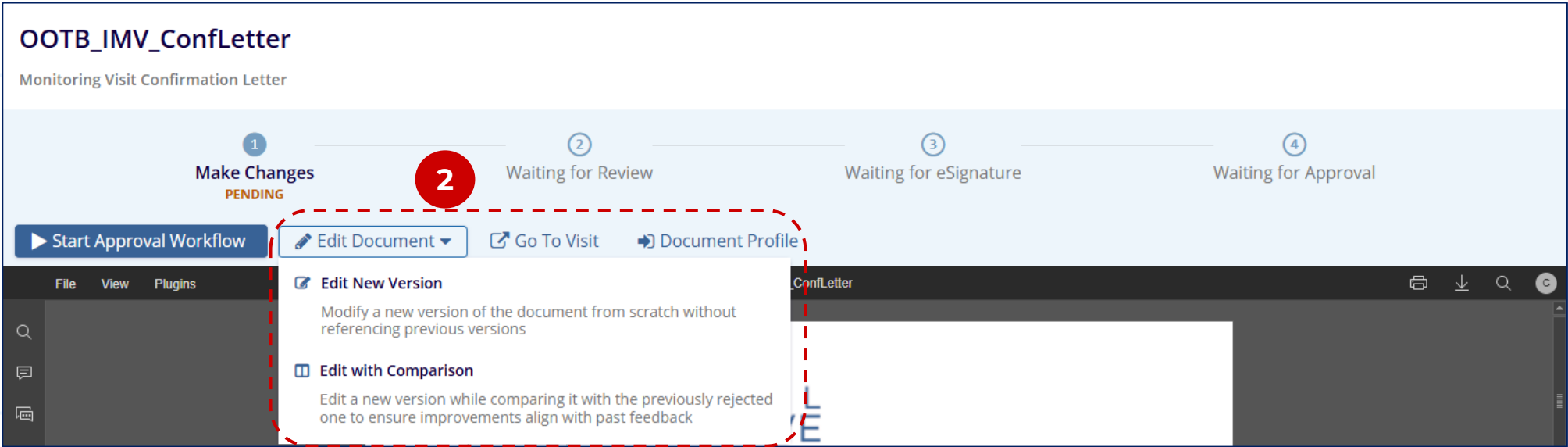
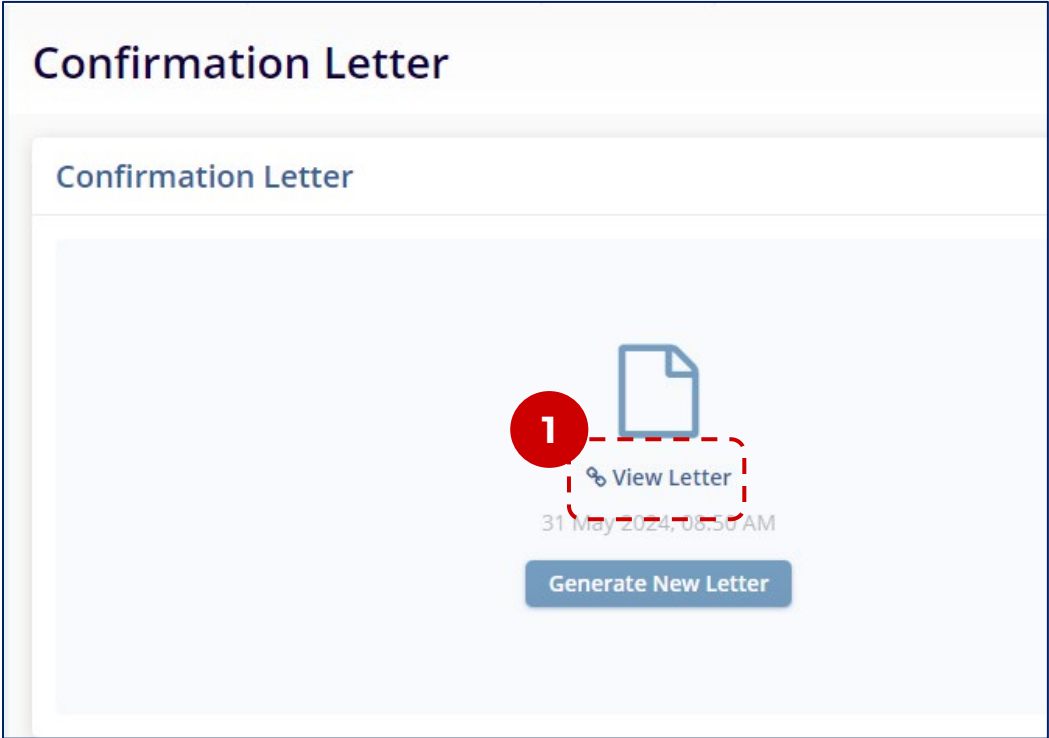
APPLICABLE TO

- CRA

- 1

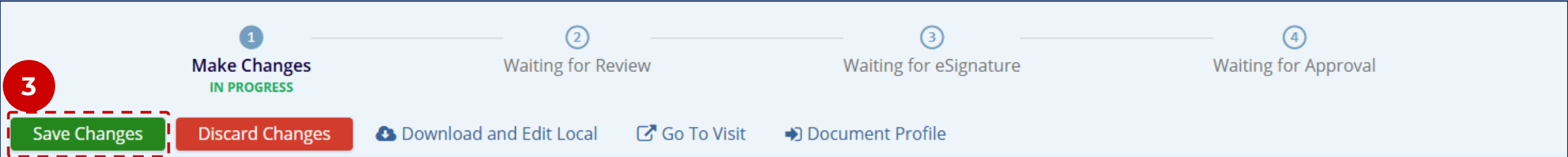
Press **View Letter** to open the letter in a new tab.
- 2

The letter will open for review. Press **Edit Document** to begin reviewing and finalizing the letter.



- 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**.



- This will end the editing session and allow the user to send the document forward to the next step in the process, whether that be a review step or the eSignature process.

**\*\*Note: All changes are automatically saved as they are made. \*\***

The 'Save Changes' button merely closes the editing session. Users can step away from an editing session and return later as needed.

# How to Finalize a Letter via a Workflow

CTMS v3.1



4 Press **Start Approval Workflow**.

1  
Make Changes  
PENDING

2  
Waiting for Review

3  
Waiting for eSignature

4  
Waiting for Approval

▶ Start Approval Workflow

✎ Edit Document ▼

📄 Compare Side By Side

🔗 Go To Visit

👤 Document Profile

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.

OOTB\_IMV\_ConfLetter

Monitoring Visit Confirmation Letter

✓  
Make Changes  
Complete

✓  
Waiting for Review  
Complete

3  
Waiting for eSignature  
Pending

4  
Waiting for Approval

📄 Compare with Previous Version

🔗 Go To Visit

👤 Document Profile

6  
✎ Send document for eSignature

6 Press **Send document for eSignature**.

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

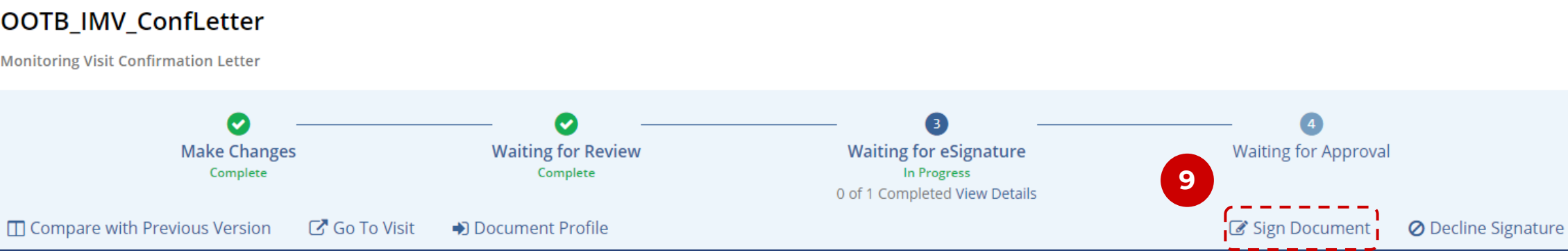
1 columns 1 selected

<input checked="" type="checkbox"/>	Name	7 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.

8  
Cancel OK

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**.

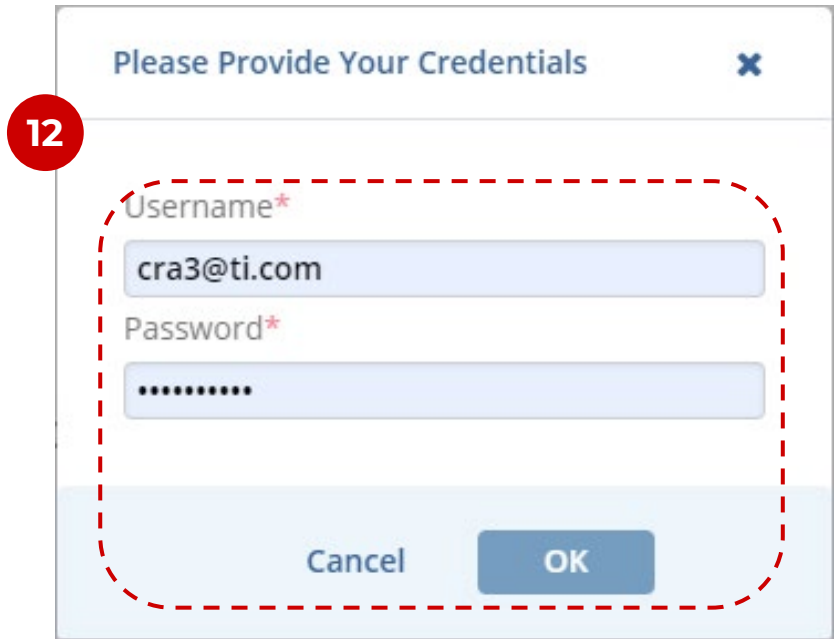


10 The 'Sign Document' window will appear. Provide a reason for signature.

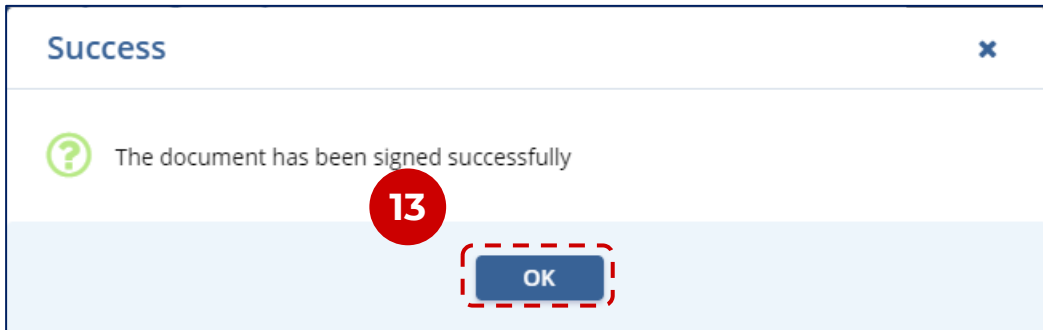
11 Press **Sign Document**.



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

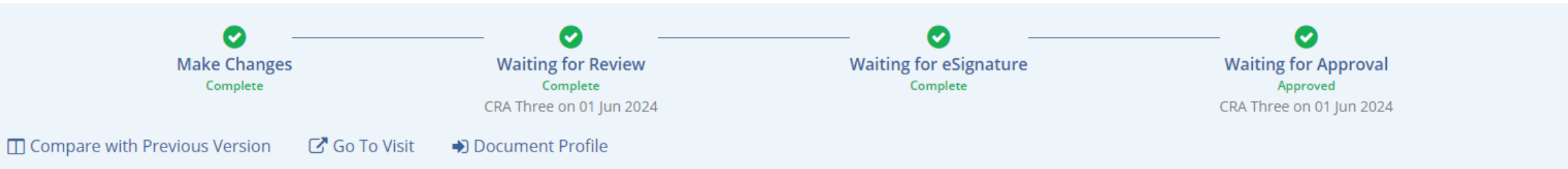


**13** A popup window appears indicating that the document has been successfully signed. Press **OK**.



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

**OOTB\_IMV\_ConfLetter**  
Monitoring Visit Confirmation Letter



**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.

