

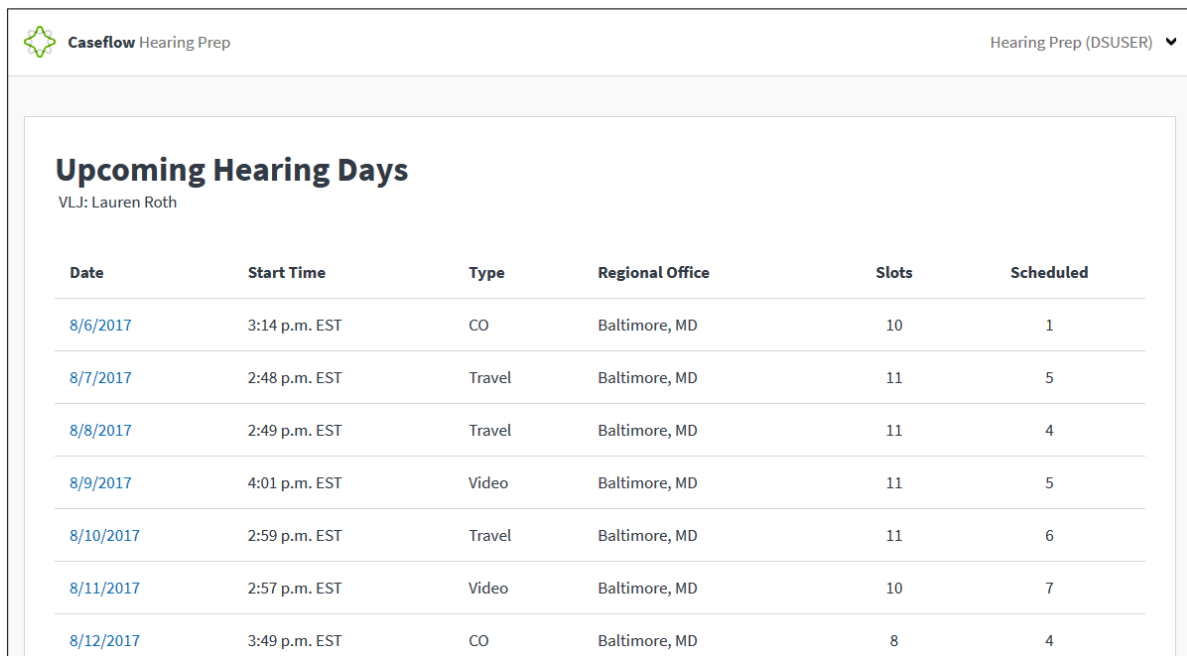
# Hearing Prep – Training Guide

Hearing Prep helps judges rapidly prepare for their upcoming hearings. It allows judges to view their upcoming hearings, view relevant appellant information, take notes before and during a hearing, and review documents in the veteran's efolder. Hearing Prep was built by the Digital Service at VA (DSVA) and will create cost savings and process improvements for many areas of the VA.

## Accessing and Using Hearing Prep

### Logging into Hearing Prep

1. Connect to the VA network.
2. Using your Google Chrome browser, navigate to <https://appeals.cf.ds.va.gov/hearings/dockets>.
3. Sign in using your VA credentials.
4. The Hearing Prep Welcome page will show all of the cases currently checked-in to you.



The screenshot shows the Caseflow Hearing Prep interface. At the top left is the Caseflow logo and 'Hearing Prep'. At the top right is the user name 'Hearing Prep (DSUSER)' with a dropdown arrow. The main content area is titled 'Upcoming Hearing Days' with a subtitle 'VLJ: Lauren Roth'. Below this is a table with the following data:

Date	Start Time	Type	Regional Office	Slots	Scheduled
8/6/2017	3:14 p.m. EST	CO	Baltimore, MD	10	1
8/7/2017	2:48 p.m. EST	Travel	Baltimore, MD	11	5
8/8/2017	2:49 p.m. EST	Travel	Baltimore, MD	11	4
8/9/2017	4:01 p.m. EST	Video	Baltimore, MD	11	5
8/10/2017	2:59 p.m. EST	Travel	Baltimore, MD	11	6
8/11/2017	2:57 p.m. EST	Video	Baltimore, MD	10	7
8/12/2017	3:49 p.m. EST	CO	Baltimore, MD	8	4

### Reviewing a Daily Docket

- On the Upcoming Hearing Days page, click the date of the Daily Docket you would like to review.

Caseflow Hearing Prep
Hearing Prep (DSUSER) ▼

### Upcoming Hearing Days

VLJ: Lauren Roth

Date	Start Time	Type	Regional Office	Slots	Scheduled
8/6/2017	3:14 p.m. EST	CO	Baltimore, MD	10	1
8/7/2017	2:48 p.m. EST	Travel	Baltimore, MD	11	5
8/8/2017	2:49 p.m. EST	Travel	Baltimore, MD	11	4
8/9/2017	4:01 p.m. EST	Video	Baltimore, MD	11	5
8/10/2017	2:59 p.m. EST	Travel	Baltimore, MD	11	6
8/11/2017	2:57 p.m. EST	Video	Baltimore, MD	10	7
8/12/2017	3:49 p.m. EST	CO	Baltimore, MD	8	4

- You will then be taken to the Daily Docket for that date.
- The Daily Docket lists the hearings scheduled for the day, along with the Time/Regional Office, Appellant's Name, Veteran's VBMS ID, Representative (if applicable), Actions, and Notes.

Caseflow Hearing Prep | Daily Docket
Hearing Prep (DSUSER) ▼

### Daily Docket

VLJ: Lauren Roth

Wed 8/16/2017  
Hearing Type: Video

Last saved at 10:30am

Time/Regional Office	Appellant	Representative	Actions
1. 11:35 a.m. EDT Baltimore, MD	MADISON, SUSAN A. 00a44503c Notes: <input type="text"/>	Military Order of the Purple Heart	<div>Disposition: No Show</div> <div>Hold Open: 30 days</div> <div>AOD: Select...</div> <div>Add on: <input type="checkbox"/></div> <div>Transcript Requested: <input type="checkbox"/></div>
2. 11:35 a.m. EDT Baltimore, MD	JEFFERSON, ANDREW A. c27e5cccf Notes: <input type="text"/>	Military Order of the Purple Heart	<div>Disposition: Held</div> <div>Hold Open: 90 days</div> <div>AOD: Filed</div> <div>Add on: <input type="checkbox"/></div> <div>Transcript Requested: <input type="checkbox"/></div>
3. 11:35 a.m. EDT Baltimore, MD	JACKSON, JOHN A. a1fe6cad1 Notes: <input type="text"/>	Military Order of the Purple Heart	<div>Disposition: Held</div> <div>Hold Open: 60 days</div> <div>AOD: Select...</div> <div>Add on: <input type="checkbox"/></div> <div>Transcript Requested: <input type="checkbox"/></div>

< Back to Upcoming Hearing Days

**NOTE:** Click the *Back to Upcoming Hearing Days* link at the bottom left of the page, or the *Caseflow Hearing Prep* icon at the top right-hand corner of the page, to return to the *Upcoming Hearing Days* page.

## Accessing the Hearing Worksheet

- Click the Veteran's VBMS ID number located under the Appellant's name to access the Appellant's Hearing Worksheet.

### Daily Docket

VLJ: Lauren Roth

Time/Regional Office	Appellant	Representative	Actions
1. 11:35 a.m. EDT Baltimore, MD	MADISON, SUSAN A. <b>00a44503c</b> Notes: <input type="text"/>	Military Order of the Purple Heart	<div>Disposition: No Show <input type="button" value="v"/></div> <div>Hold Open: 30 days <input type="button" value="v"/></div> <div><input type="checkbox"/> Add on <input type="checkbox"/> Transcript Request</div>
2. 11:35 a.m. EDT Baltimore, MD	JEFFERSON, ANDREW A. <b>c27e5ccf</b> Notes: <input type="text"/>	Military Order of the Purple Heart	<div>Disposition: Held <input type="button" value="v"/></div> <div>Hold Open: 90 days <input type="button" value="v"/></div> <div><input type="checkbox"/> Add on <input type="checkbox"/> Transcript Request</div>

- You will be taken to the Appellant's Hearing Worksheet.

Caseflow Hearing Prep | Daily Docket | Hearing Worksheet

Hearing Prep (DSUSER)

### Hearing Worksheet

VLJ: Lauren Roth

Wed 8/23/2017  
Hearing Type: Video

Saving...

#### Appellant/Veteran Information

Appellant Name: Somebody Mad	City/State: Lansing, MI	Regional Office: Detroit, MI	Representative Org: Veterans of Foreign Wars	Rep. Name: <input type="text"/>
Veteran Name: Somebody Madder	Veteran ID:	Docket Number: 1234567	Veteran's Age: 32	Witness (W)/Observer (O): <input type="text"/>

#### Relevant Documents

Docs in eFolder: 80  
APPEAL STREAM 1

NOD: 01/01/1990	Form 9: 01/01/1990	Prior BVA Decision: 01/01/1990	Docs since Certification: 23
SOC: 01/01/1990	Certification: 01/01/1990	SSOC: 01/01/1990	

#### Issues

APPEAL STREAM 1

## Adding and Deleting Issues on the Hearing Worksheet

The Issues section of the Hearing Worksheet shows the issues on appeal for each appeal stream.

**Issues**

APPEAL STREAM 1

Program	Issue	Levels 1-3	Description	Preliminary Impressions			
1. Compensation	Service connection	All Others, 5010 - Migraine	<div>Frequent headaches, caused by concussion</div> <div>80 characters left</div>	<input type="checkbox"/> Re-Open	<input type="checkbox"/> Allow	<input type="checkbox"/> Deny	
				<input type="checkbox"/> Remand	<input type="checkbox"/> Dismiss	<input type="checkbox"/> VHA	
2. Compensation	Service connection	All Others, 5010 - Arthritis, due to trauma	<div>Left Elbow</div> <div>110 characters left</div>	<input type="checkbox"/> Re-Open	<input type="checkbox"/> Allow	<input type="checkbox"/> Deny	
				<input type="checkbox"/> Remand	<input type="checkbox"/> Dismiss	<input type="checkbox"/> VHA	

+ Add Issue

### Adding an Issue

- Click **+Add Issue** to add an issue to an appeal stream. A new row of boxes will appear.
- Type the required information, for the issue, into the new row of boxes.

**Issues**


APPEAL STREAM 1

Program	Issue	Levels 1-3	Description	Preliminary Impressions			
1. Compensation	Service connection	All Others, 5010 - Arthritis, due to trauma	<div>Left Elbow</div>	<input type="checkbox"/> Re-Open	<input type="checkbox"/> Allow	<input type="checkbox"/> Deny	
				<input type="checkbox"/> Remand	<input type="checkbox"/> Dismiss	<input type="checkbox"/> VHA	
2. Compensation	Service connection	All Others, 5010 - Migraine	<div>Frequent headaches, caused by concussion</div>	<input type="checkbox"/> Re-Open	<input type="checkbox"/> Allow	<input type="checkbox"/> Deny	
				<input type="checkbox"/> Remand	<input type="checkbox"/> Dismiss	<input type="checkbox"/> VHA	
3.				<input type="checkbox"/> Re-Open	<input type="checkbox"/> Allow	<input type="checkbox"/> Deny	
				<input type="checkbox"/> Remand	<input type="checkbox"/> Dismiss	<input type="checkbox"/> VHA	

+ Add Issue



## Deleting an Issue

- Click the trashcan located to the right of the issue you wish to delete.

Issues				
APPEAL STREAM 1				
Program	Issue	Levels 1-3	Description	Preliminary Impressions
1. Compensation	Service connection	All Others, 5010 - Migrane	Frequent headaches, caused by concussion <small>80 characters left</small>	<input type="checkbox"/> Re-Open <input type="checkbox"/> Allow <input type="checkbox"/> Deny <input type="checkbox"/> Remand <input type="checkbox"/> Dismiss <input type="checkbox"/> VHA 

- Click **Yes** in the Remove Issue Row dialog box to remove the issue from the Hearing Worksheet.

**Note:** The issue will be removed from the Hearing Worksheet but will remain in VACOLS.

Issues				
APPEAL STREAM 1				
Program	Issue	Levels 1-3	Description	Preliminary Impressions
1. Compensation	Service connection	All Others, 5010 - Migrane	Frequent headaches, caused by concussion	<input type="checkbox"/> Re-Open <input type="checkbox"/> Allow <input type="checkbox"/> Deny <input type="checkbox"/> Remand <input type="checkbox"/> Dismiss <input type="checkbox"/> VHA 
2. Compensation	Service connection	All Others, 5010 - Migrane		<input type="checkbox"/> Re-Open <input type="checkbox"/> Allow <input type="checkbox"/> Deny <input type="checkbox"/> Remand <input type="checkbox"/> Dismiss <input type="checkbox"/> VHA 

**Remove Issue Row**

Are you sure you want to remove this issue from Appeal Stream 1 on the worksheet?

This issue will be removed from the worksheet, but will remain in VACOLS.

## Reviewing an Veteran's eFolder

- Click the **Review eFolder** button located at the bottom right-hand corner of the Appellant's Hearing Worksheet page to begin reviewing the Veteran's efolder.

*Note: You will be taken to Caseflow Reader to review the Veteran's efolder.*

The screenshot shows a web form with two main sections: 'Evidence' and 'Comments and special instructions to attorneys'. Each section has a large text area for input. At the bottom right of the form, there is a blue button labeled 'Review eFolder' which is highlighted with a red rectangular border. At the bottom of the page, there is a footer with the text 'Built with ♥ by the Digital Service at the VA' on the left and 'Send feedback' on the right.

## Claims Folder Page

You are now on the claims folder page in Caseflow Reader. The documents in the claims folder are sorted newest to oldest by default.

- Click on the column headers to sort by Receipt Date or Document Type.

**NOTE:** Initially, the documents will appear in bold font. Once viewed, the documents will appear in regular font.

Caseflow Reader | Smith, Joe, A (123) Reader (RO03) ▼

### Joe A Smith's Claims Folder

You've viewed 0 out of 5 documents

Claims folder details +

5 Documents Show all: Documents Comments

Categories	Receipt Date	Document Type	Issue Tags	Comments
	08/06/2017	<b>Form 9</b>		
	08/06/2017	<b>SOC</b>	Right Knee	1 ▼
	08/06/2017	<b>NOD</b>	Service Connected	1 ▼
	08/02/2017	This is a very long document type let's see what it does to the UI!		
	08/01/2017	<b>BVA Decision</b>		

### Displaying Claims Folder Details

The **Claims folder details** include the Veteran ID, Type, Docket Number, Regional Office, and Issues as listed in VACOLS.

- Click the “+” or “-” to expand or collapse the **Claims folder details**.

Claims folder details -

<b>Veteran ID</b> DEMO123	<b>Type</b> Court Remand AOD, CAVC	<b>Docket Number</b> 13 11-265	<b>Regional Office</b> RO13 - Baltimore
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**Issues**

1. Service Connection: All Others, Thigh, limitation of flexion of
2. Service Connection: All Others, Thigh, limitation of flexion of

## Searching

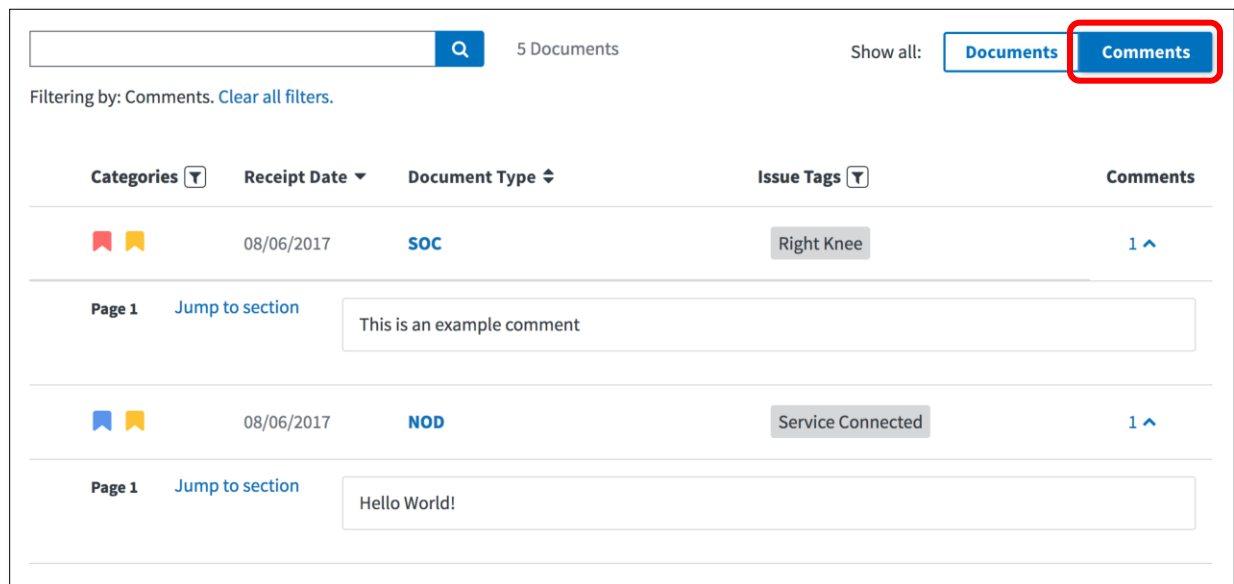
- Click inside the search bar to search for documents by categories, issues tags, comments text, and document metadata from VBMS (such as Receipt Date or Document Type).

**NOTE:** You cannot currently search for document text from the main search bar, but you can still use "Ctrl + F" on an open document to search its contents (if the document was scanned with character recognition).



## Viewing Comments

- Click the **Comments** button to view all documents with comments. Their comments will be expanded for easy viewing.



5 Documents

Show all: **Documents** **Comments**

Filtering by: Comments. [Clear all filters.](#)

Categories	Receipt Date	Document Type	Issue Tags	Comments
	08/06/2017	<b>SOC</b>	Right Knee	1 ^
<div>Page 1 <a href="#">Jump to section</a></div> <div>This is an example comment</div>				
	08/06/2017	<b>NOD</b>	Service Connected	1 ^
<div>Page 1 <a href="#">Jump to section</a></div> <div>Hello World!</div>				

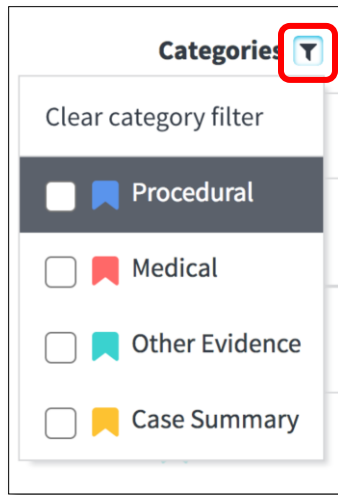
**NOTE:** Click the dropdown arrow next to the number under the Comments column to expand comments individually.



### ***Filtering by Categories***

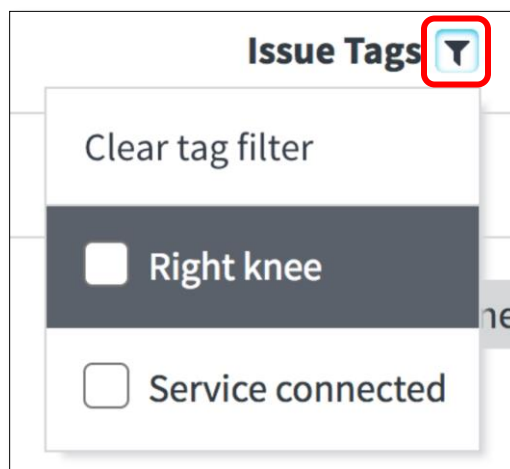
- Click the funnel icon and the desired categories to filter documents by one or more categories.

***NOTE: The Case Summary category is predefined for a specific set of documents and cannot be changed.***








### ***Filtering by Issues Tags***

- Click the funnel icon and the desired issue tag(s) to filter documents by one or more issue tags.



### *Sorting by Receipt Date or Document Type*

- Click the arrow next the column heading to sort documents in ascending or descending order by Receipt Date or Document Type.

Categories 	Receipt Date 	Document Type 
  	08/06/2017	<b>Form 9</b>

## Reviewing Documents

- Click the document title of the document you wish to review (e.g. NOD) to begin reviewing the document. You will be taken to the Document Viewer.

**Joe A Smith's Claims Folder**

Claims folder details

Search: [ ] 5 Documents Show all: [ ]

Categories	Receipt Date	Document Type	Issue Tags
[ ] [ ] [ ]	08/01/2017	Form 9	
[ ] [ ]	08/01/2017	SOC	Right Knee
[ ] [ ]	08/01/2017	<b>NOD</b>	Service Connected

- The Document Viewer allows you to review the document, add categories, add issue tags, add comments, and move between documents in the claims folder.

**NOTE:** The sections in the side menu may be collapsed or expanded by clicking the “-” or the “+” next to the heading.

Caseflow Reader

Reader (DSUSER)

Back to claims folder

Zoom: [ ] [ ] [ ] [ ]

Hide menu

Document information

Document Type: NOD  
Receipt Date: 08/05/2017

Categories

☒ Procedural  
☐ Medical  
☐ Other Evidence  
☒ Case Summary

Issue tags

Select or tag issue(s)

Service Connected

Comments

+ Add a comment

Page 1 Delete Edit

Hallo World!

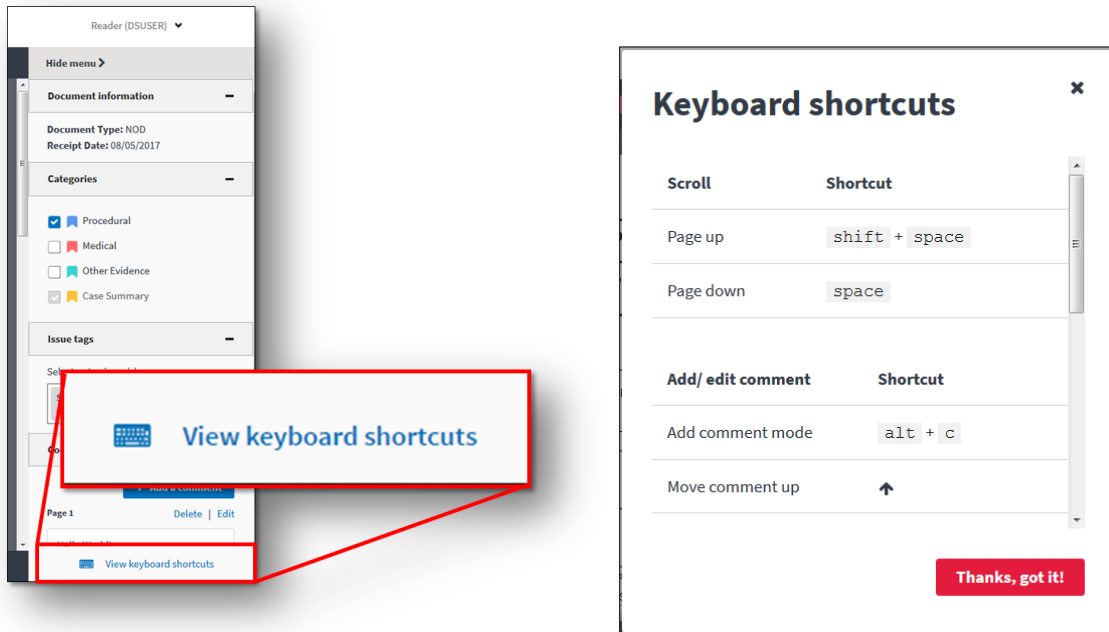
View keyboard shortcuts

Previous Page 1 of 2 Document 3 of 5 Next

## Navigating the Document

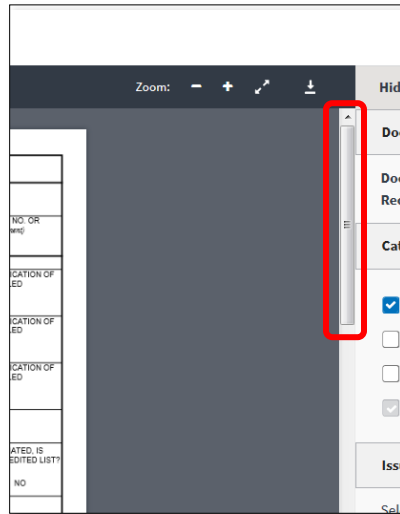
Navigate through the document by clicking with the mouse or using the available keyboard shortcuts (for example: use the left and right arrows to move between documents, and the up and down arrows to scroll within a document).

- Click **View keyboard shortcuts** located in the bottom right-hand corner of the Document Viewer Menu to access the list of keyboard shortcuts.



## Scrolling Through the Document

- Click on the scroll bar to the right of the document and dragging it up or down to scroll through the document. You may also scroll through the document by using the up or down arrow keys on the keyboard.



## Viewing the Next Document in the Claims Folder

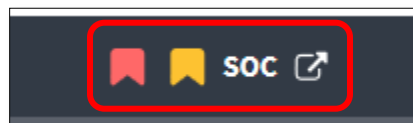
- Click the **Next** or **Previous** buttons at the bottom of the Document Viewer to view the next document in the claims folder.

**NOTE:** You may also click the right or left arrow on the keyboard to view the next or previous document in the claims folder. Or, click the "Back to claims folder" button at the top left-hand corner of the Document Viewer and select the desired document from the Document List page.



## Viewing the Document in a New Tab

- Click on the document title at the top of the Document Viewer to view the document in a new tab.

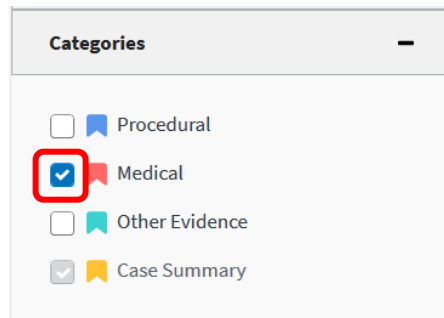


## Adding a Category to a Document

Categories are used to identify documents as Procedural, Medical, Other Evidence, or Case Summary.

- Click the desired category within the **Categories** section of the Document Viewer Menu to add a **Procedural**, **Medical**, or **Other Evidence** category to a document.

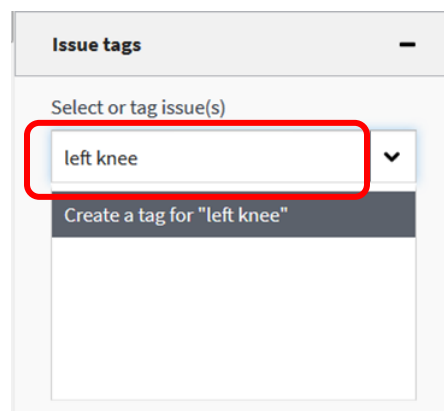
**NOTE:** The *Case Summary* category is predefined for a specific set of documents and cannot be changed.



## Adding Issue Tags to a Document

Issue Tags are used to identify issues associated with a document.

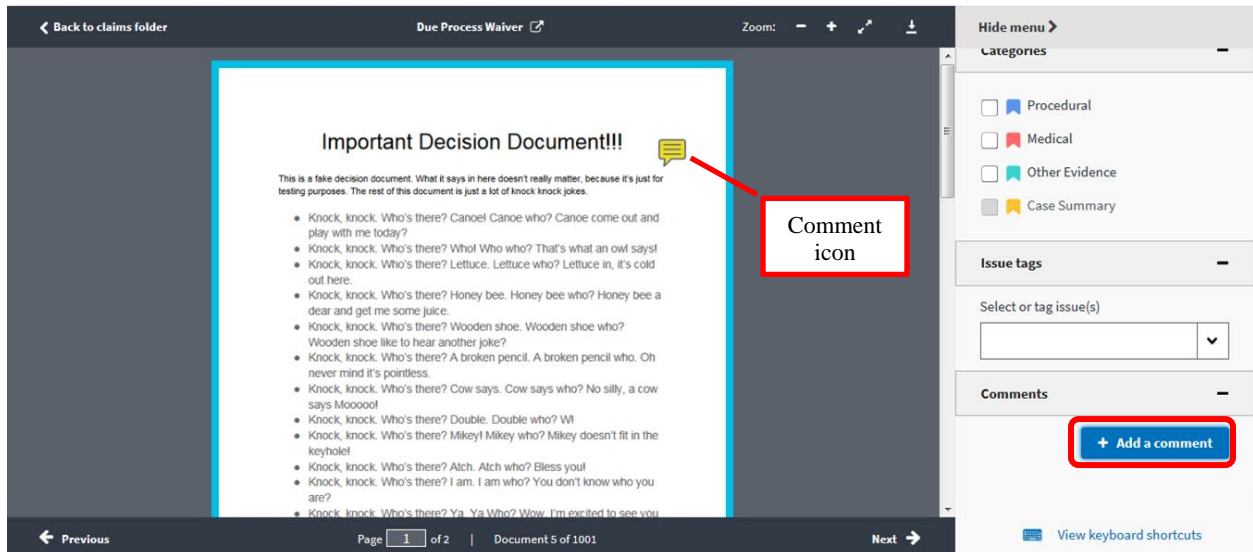
- Click in the box in the **Issue tags** section of the Document Viewer Menu to add an issue tag to a document.
- Type in a new issue tag and press Enter, or select an existing issue tag from the dropdown menu.



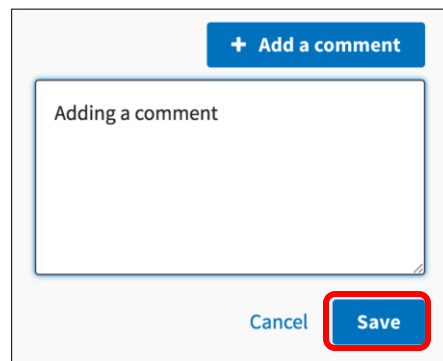
## Adding, Deleting, and Editing Comments within a Document

### Adding a Comment

- Click the **Add a comment** button and click the desired comment location within the document (indicated by the comment icon) to add a comment to a document.

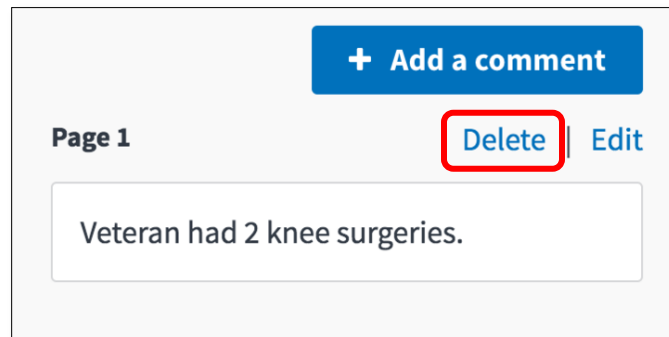


- Type the desired comment into the dialog box within the **Comments** section of the Document Viewer Menu. Click the **Save** button to save the comment.

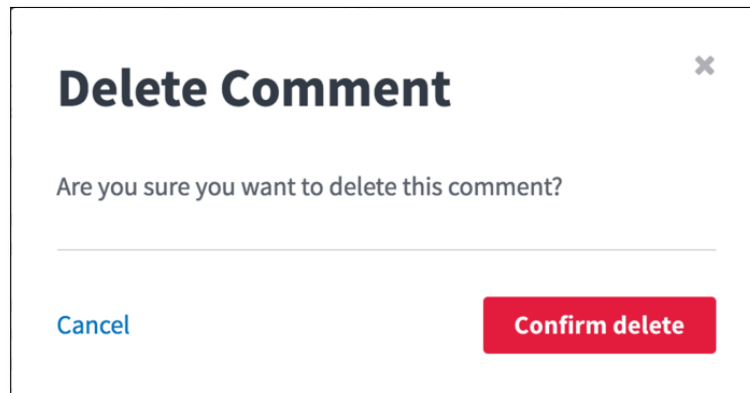


### *Deleting a Comment*

- Locate the comment you wish to delete in the **Comments** section of the Document Viewer Menu and click the **Delete** button above the comment to delete the comment.



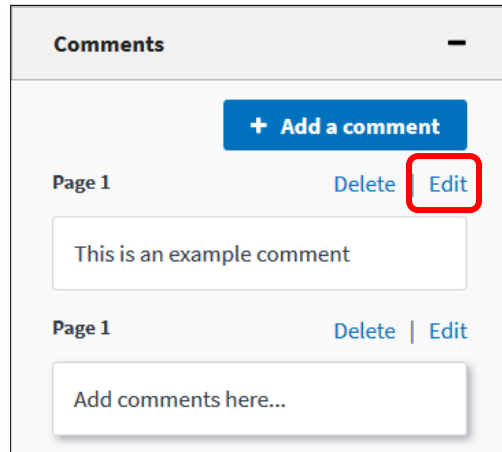
- Click the **Confirm delete** button to confirm the deletion of the comment.



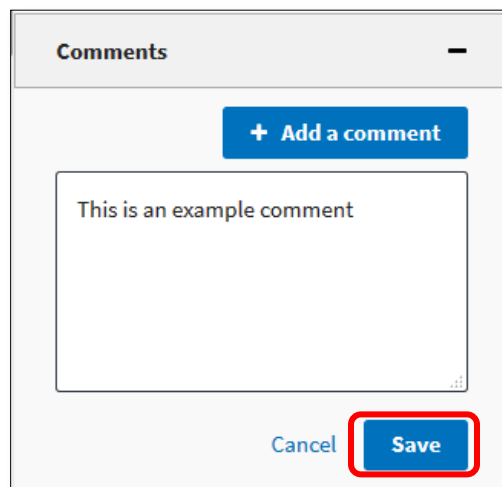


## *Editing a Comment*

- Locate the comment you wish to edit in the **Comments** section of the Document Viewer Menu and click the **Edit** button above the comment to edit the comment.

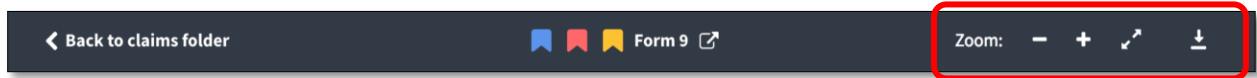


- Make the desired changes to the comment and click the **Save** button.



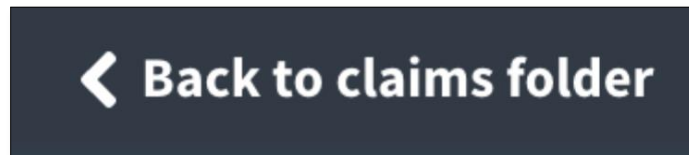
## Zoom, Fit-to-page, or Download

- Click the icon for the desired action, in the upper right-hand corner of the Document Viewer, to zoom in, zoom out, fit-to-page, or download a document.



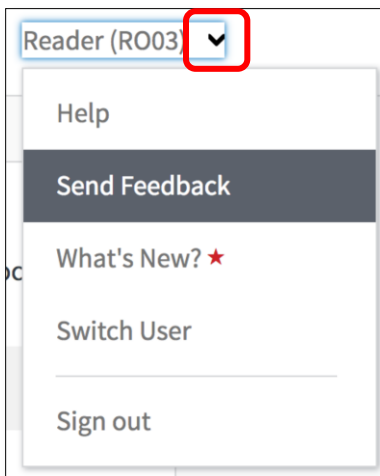
## Returning to the Claims Folder

- Click **Back to claims folder** link in the upper left-hand corner of the Document Viewer to return to the **Document List** page.



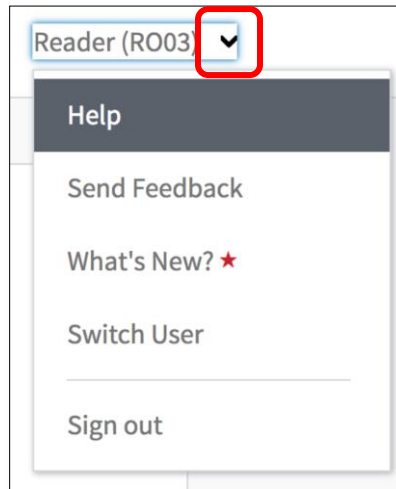
## Sending Feedback

- Click the arrow next to your username in the upper right-hand corner and select **Send Feedback** from the dropdown menu to send feedback to the Caseflow Product Support Team.



## Need Additional Help?

- Click the arrow next to your username and select **Help** from the dropdown menu to access the Reader Frequently Asked Questions (FAQs), for more information about Reader.



If you need technical support, would like to provide feedback or would like to make a new feature request, reach out to the Caseflow Product Support Team by phone (1-844-876-5548) or email: [caseflow@va.gov](mailto:caseflow@va.gov).