

DAV Department of Arizona



Guide to Running Zoom Meetings with Remote Sites

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USING THE
DAV REMOTE CLAIM STATION WITH A SERVICE OFFICER



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To create a Zoom meeting, go to zoom.com and set up a free account if you do not already have a subscription account

- NOTE: Free accounts only let you have a 40-minute session. Some claims may need you to start a second session.

Click on the blue “Schedule” icon to schedule the meeting.

- Call the meeting [name of remote site]”
- Set the date and time for the claims meeting
- The duration will be limited to 40 minutes on a free account
- For the invitee, put the site email address
- Scroll down and select “On” for video and audio, and select “Computer audio”
- *Leave the rest of the settings alone*
- Scroll to the bottom of the page and click “Save”

The screenshot shows the 'Schedule Meeting' form in the Zoom web interface. At the top, there is a link '< Back to Meetings'. The form is titled 'Schedule Meeting'. The 'Topic' field is set to 'Pinon 1 Claims'. Below it is a link '+ Add Description'. The 'When' field shows the date '03/02/2026' and time '13:00'. The 'Duration' field is set to '0' hours and '40' minutes. The 'Time Zone' is set to '(GMT-7:00) Arizona'. There is a checkbox for 'Recurring meeting' which is unchecked. The 'Invitees' section has a text input 'Enter user names or email addresses' and a list of invitees, including 'DAV Pinon.Remote.1@outlook.com'. The 'Registration' section has a checkbox for 'Required' which is unchecked. The 'Meeting ID' section has two options: 'Generate Automatically' (selected) and 'Personal Meeting ID 520 555 4431'. The 'Template' section has a dropdown menu 'Select a template'. The 'Whiteboard' section has a button 'Add Whiteboard'. The 'Docs' section has a button 'Add Docs'. The 'Security' section has several options: 'Passcode' (checked, with value '428904'), 'Waiting Room' (checked), 'Follow Zoom web portal setting' (selected), 'Select who should go into the waiting room for this meeting' (unchecked), and 'Require authentication to join' (unchecked). The 'AI Companion' section has two options: 'Automatically start AI Companion' (checked) and 'Automatically start meeting questions' (checked). At the bottom, there are 'Save' and 'Cancel' buttons.

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When your scheduled time arrives, you can start the meeting.

- If you start it early, you will run out of time—the free account only gives you 40 minutes per session.

If your computer does not have the Zoom app already on it, just “Join from browser”

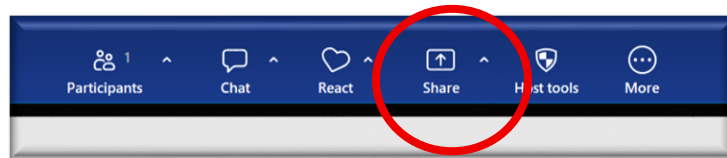
- Make sure that your video and audio settings are clear (no red line through them)



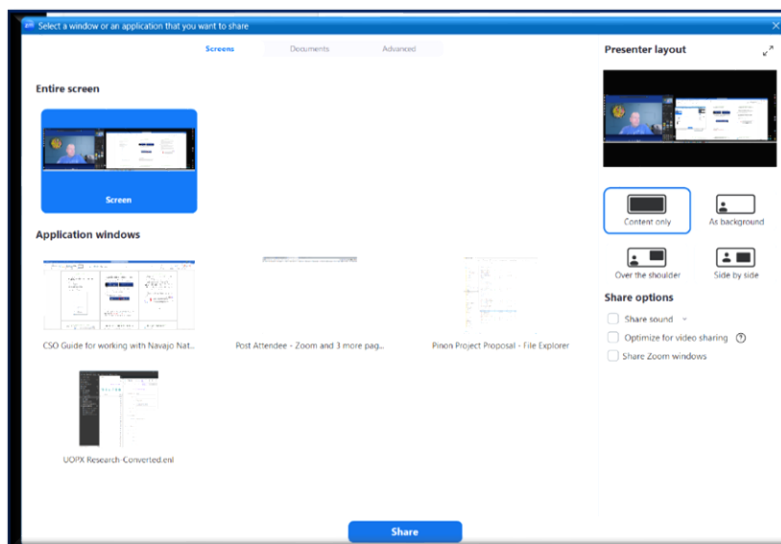
- When you start the claim, the Veteran has the ability to scan and email his/her DD-214 to you. I suggest requesting that at the start—you will need to provide the Veteran with the email address that you want the document sent to.

You should share the claim document as you are filling it out so that the Veteran can see it. To do this:

- Open the document on your desktop
- Click on “Share” at the bottom of the Zoom screen



- From the next screen, select the item you want to share



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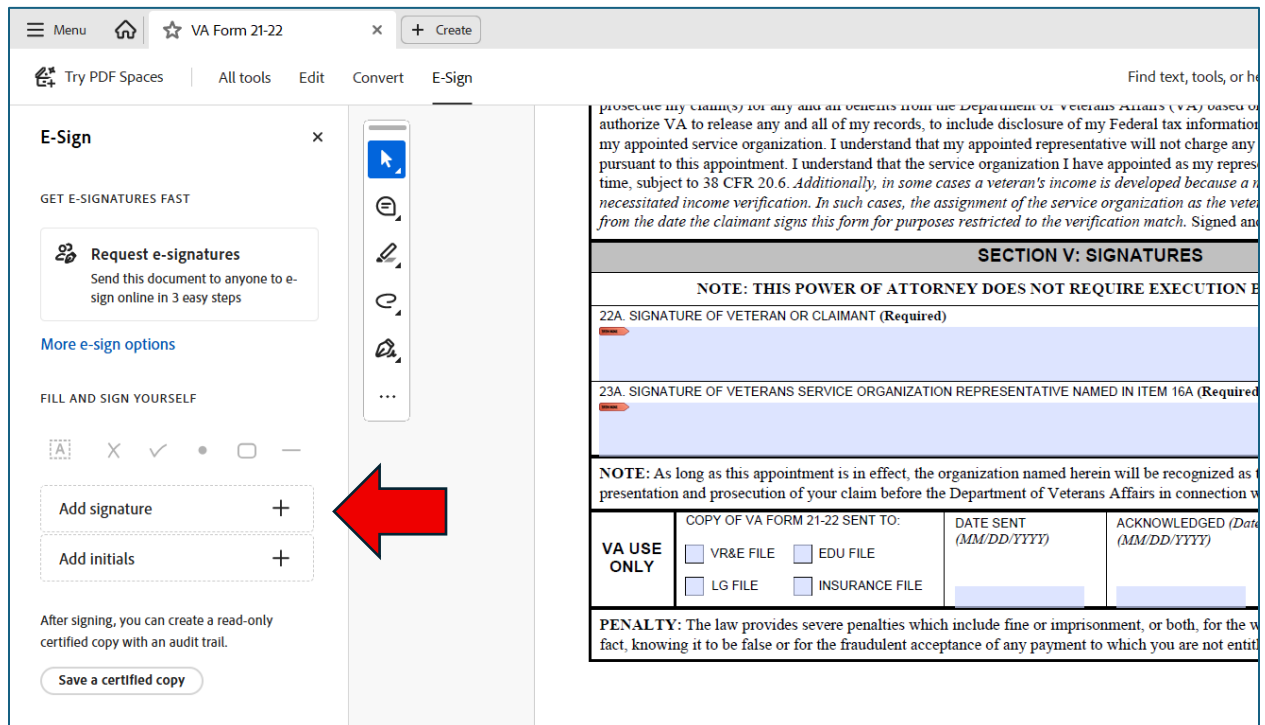
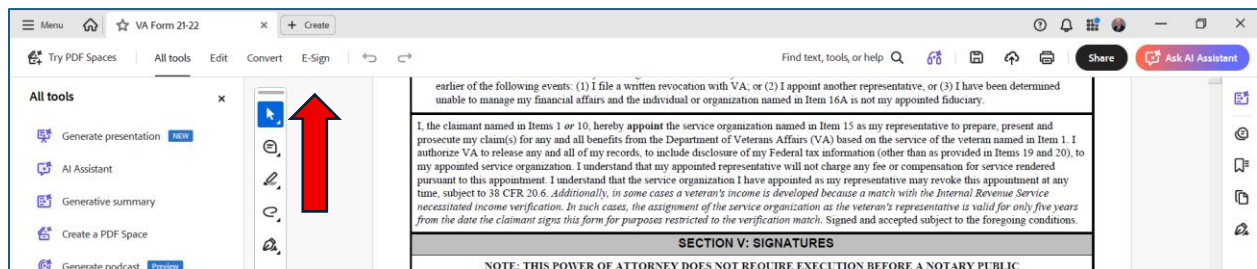
- The Veteran will be able to see the form on his/her screen as you complete it.

When you are ready for the Veteran to sign the form:

- The site manager will have the Veteran/claimant sign a blank sheet of white paper.
- The site manager will scan and email the signature to you.
- Crop the signature page to minimize the white area around the signature. Save the signature (to your desktop is an easy way to find it).
- You can then use the “e-sign” function of your PDF program to drop the signature into the signature block on the claim form(s).
- Make sure that you save everything on your computer for uploading later!

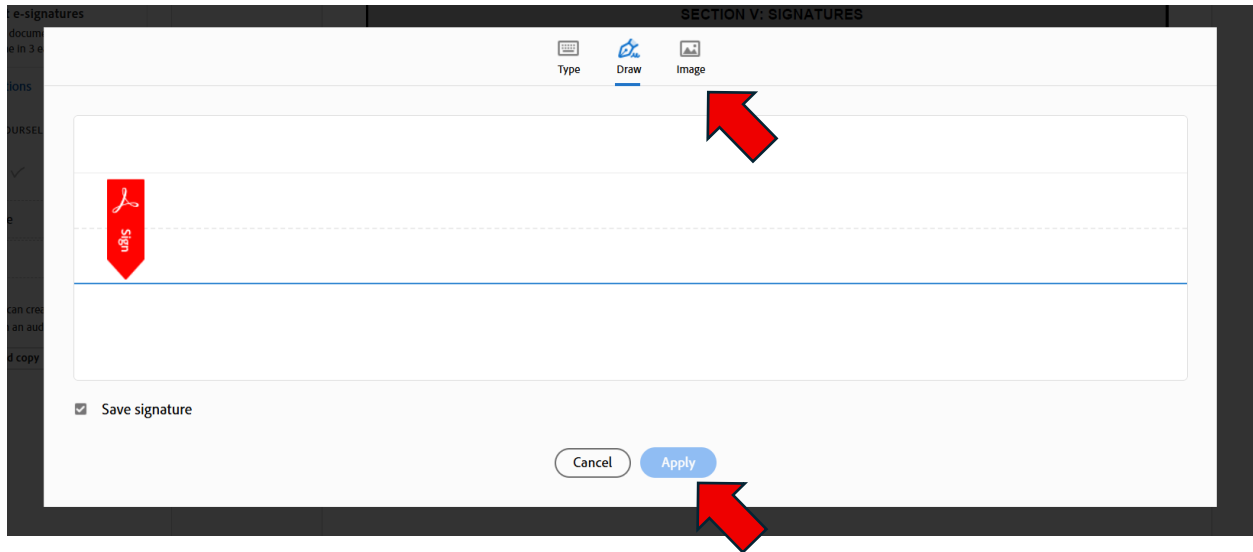
https://acrobat.adobe.com/link/acrobat/add-comment?x_api_client_id=adobe_com&x_api_client_location=add_comment

You will do the same thing for each form needed for the claim.



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- When the white box comes up, click on “image” at the top of the white box.
- Upload the signature image from the desktop (or where you saved it).



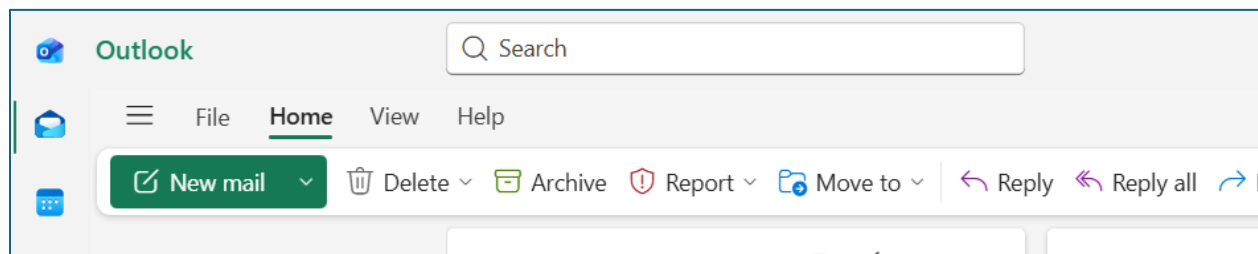
- Single-click on APPLY.

You will save each form as a PDF file to the desktop. You will name each file “Veteran’s last name” and the form number (EXAMPLE: Smith-21-0526EZ).

You will scan each piece of evidence as a PDF file to the desktop. You will name each file “Veteran’s last name” and the file type (EXAMPLE: Smith-DD-214).

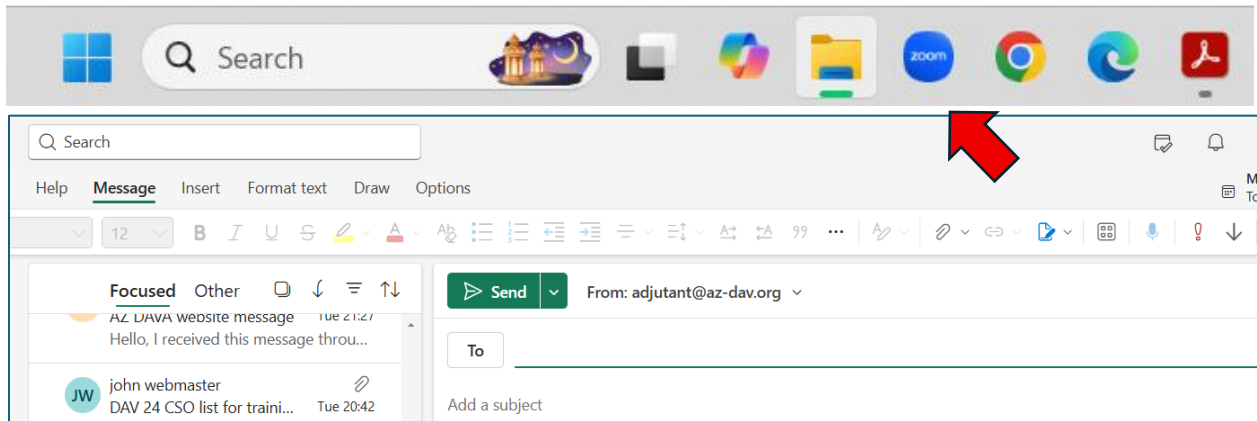
You will attach each file to an email that will be sent to an email address that the Service Officer provides.

- Open your Outlook email program.
- Click on the email that the service officer used to send you the Zoom link before the videoconference started.
- Click on NEW

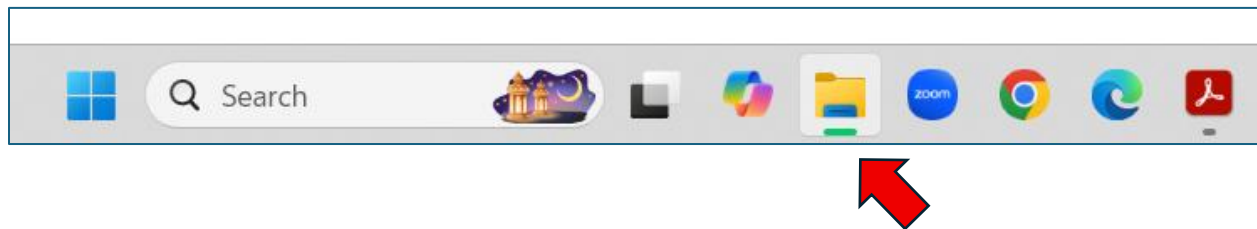


- Attach the completed forms or scanned documents to the email by single-clicking on the paper clip symbol.

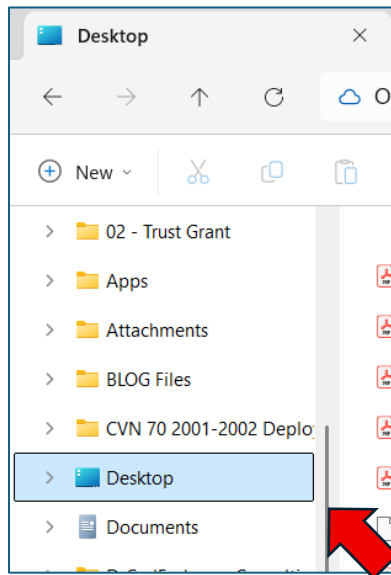
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- Select your files from the desktop by single-clicking on the folder icon at the bottom of the screen.

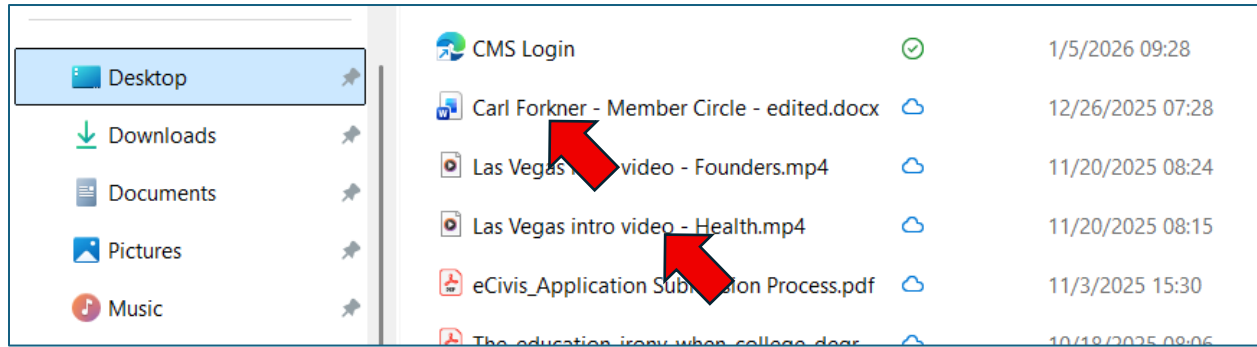


- In the left-hand menu, select DESKTOP with a single click.

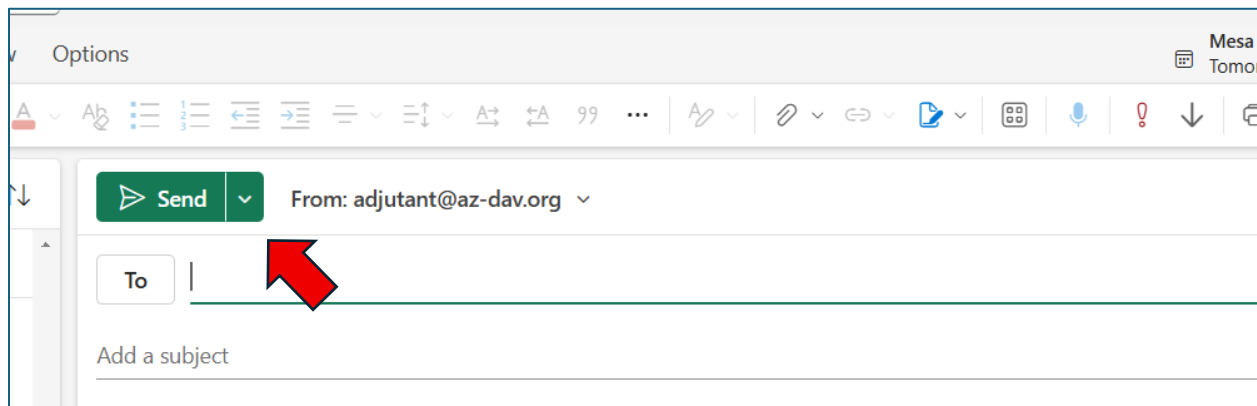


- In the window on the right, double-click on each file that you want to send to the Service Officer.

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- When the files are all attached to the email, single-click on SEND.



When the Service Officer says that they received your email with all the files, you will then delete your files from the desktop.

- Single-click on each file and then hit the DELETE key on the keyboard.

Then, delete your files from the “Recycle Bin” to make sure they are off the computer.

- Double-click on the recycle bin.
- When the list of files comes up, single-click on the top file.
- Hold down the SHIFT key on the keyboard and single-click on the bottom file in the list. All the files should now be selected.
- Hit the DELETE key on the keyboard.

The original files (the ones you signed and scanned) are yours to keep for your records.

When finished, close the Zoom meeting by clicking the END button in the bottom right corner and then click on “Leave meeting.”