

# Smart Search User Guide



## Purpose

This user guide provides instructions on how VBMS-Claims Evidence users can perform a query using Smart Search functionality. Smart Search, also known as Text Search, is enhanced VBMS functionality which allows users the ability to search Veteran eFolders, without having to open them individually. This search functionality affords users increased efficiency and will result in a significant time savings.

## 1: Identifying eFolders Eligible for Smart Search Queries

When opening the text search panel, users will see one of three Optical Character Recognition (OCR) statuses - All documents in the Claim Evidence folder OCR'ed, Some documents not OCR'ed, No documents have been OCR'ed OCR not begun. Please note, Smart Search is not operable in eFolders where the OCR status is no documents have been OCR'ed.

Filters	Text Search
Some documents not OCR'ed	
Actions	⇅
- Select -	⇅

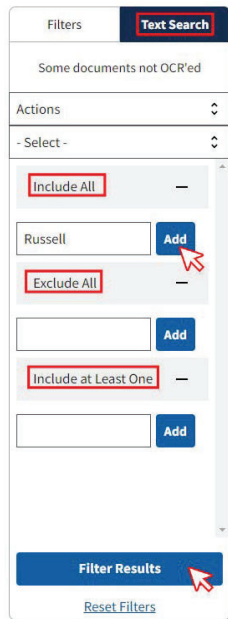
## 2: Identifying Documents Eligible for Smart Search Queries

When viewing the document library, users should review the new 'Text Searchable' column. This column will generate one of two searchable indicators for each document. These indicators are 'Searchable' and 'Not Searchable.'

Subject	Document Title	Document Type	Text Searchable
Statement Support Demo	STATEMENT SUPPORT OF CLAIM VBA-21-4138-ARE.pdf	<a href="#">Education - General</a>	Not Searchable
Diabetes Text Search Sample	Diabetes - Wikipedia.pdf	<a href="#">General Records Request (Non-Medical)</a>	Not Searchable
REQUEST VA FORMS	REQUEST VA FORMS VBA-20-8800-ARE-2023-04-05 T13.43.53.pdf	<a href="#">General Records Request (Non-Medical)</a>	Searchable

### 3: Conducting a Smart Search Query

From the document library, users should navigate to the left sidebar panel and select Text Search. Users have three text search options - 'Include All', 'Exclude All' and 'Include At Least One.' Once users have entered their desired text, select Filter Results. Users will be prompted to update results - accepting the text search will adjust the table layout.



**Update Results**

Applying text search filters will adjust the table layout. Additional columns will be added to the table. Click 'Continue' to apply changes

[Continue](#) [Cancel](#)

**If users are searching for a word, often contained within a word, they must search using the wildcard. The wildcard can only be used in the middle of a word or at the end; it cannot be used at the start of a word.**

*Example Search: Asia\**

This text is also found as 'AsiaService' within eFolders. Users must include the wildcard to surface all matches.

### 4: Identifying Smart Search Query Results

Documents with matching text from users' text search, will populate in the document library queue. Findings will be organized by receipt date. The "Text Match" column provides users the number of search keyword matches within the document. A higher count in this column may result in the best match for the keyword search.

This column represents the number of instances the text was located within the corresponding document.

Subject	Document Title	Document Type	Text Searchable	Text Matches
	20230328111748_datasheet.pdf	<a href="#">Award Print</a>	Searchable	6
Rating Decision - Narrative	20230328110102 - narrative.pdf	<a href="#">Rating Decision - Narrative</a>	Searchable	2
Rating Decision - Codesheet	20230328110102 - codesheet.pdf	<a href="#">Rating Decision - Codesheet</a>	Searchable	1

## 5: Navigating to Smart Search Query Findings

To view a document, select the hyperlink in the 'Document Type' column. VBMS will open a separate web page allowing the user to view the document. On this same page, users will see Smart Search results on the left sidebar.

Text matches will be shown in bold on the left sidebar and shown in blue on the document viewer.

To view a match in the search results sidebar, click the listed text match result.

Hide Search Results

Matches: Results 6 of 6

	Page
NUMBER: 999-03-2323 <b>RUSSELL JACKSON</b> Claim	1
Initial 010 <b>Russell</b> Jackson Compensation	1
Char Disch <b>Russell</b> Jackson Navy	1
Payment Address <b>RUSSELL JACKSON RUSSELL</b>	1
RUSSELL JACKSON <b>RUSSELL JACKSON</b> Date	1
FILE NUMBER:999-03-2323 <b>RUSSELL JACKSON</b> Review	2

1

### Award Print

STATION OF JURISDICTION: COLUMBIA (319)FILE NUMBER: 999-03-2323  
**RUSSELL JACKSON**

Claim information

Date of Claim	Type of Claim	End Product	FOA	Claimant	Claim Jurisdiction
03/28/2023	Initial Compensation & Issues	D10		Russell Jackson	

Miscellaneous Data

Net Effect of Award as of Generation	C-File Cross Reference Number	Employable	Competent Status	Fiduciary Status	PGF Loc
\$6,387.01		Y	Competent	Pay Direct	

Verified Service

Name	Branch	Duty	ECO	RAD	Char Disch
Russell Jackson	Navy	Active Duty	04/04/2020	05/05/2022	Honorable

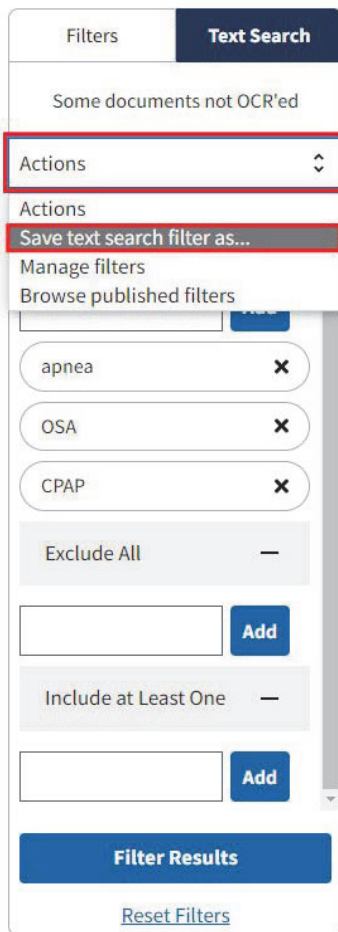
Primary Beneficiary Information

Mailing Address RUSSELL JACKSON 123 MAIN ST CHARLESTON SC USA 29414	Payment Address RUSSELL JACKSON 123 MAIN ST CHARLESTON SC USA 29414	Date of Birth: 03/03/2000 Gender: Male SSN: 999-03-2323 Net Effect: \$6,387.01
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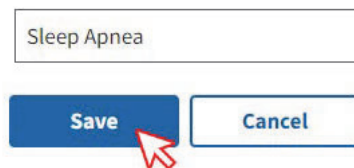
## 6: Saving Smart Search Filters

Users can save recently used smart search filters from the left text search sidebar. After conducting a text search, users should select the actions drop down and then select 'save text search filter as.'

Users will be prompted to name and save the filter.



### Save text search filter as

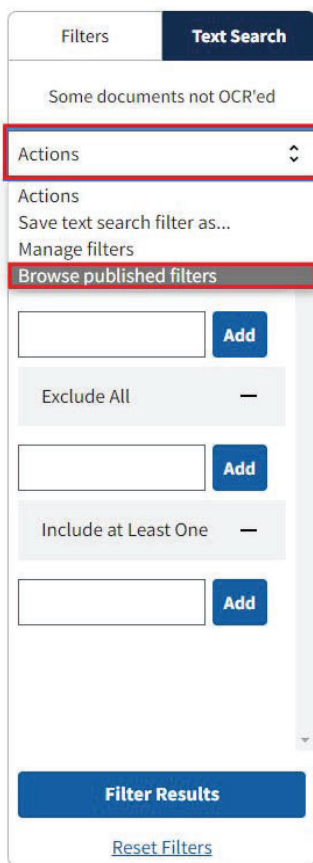
A screenshot of a dialog box titled 'Save text search filter as'. It contains a text input field with the text 'Sleep Apnea'. Below the input field are two buttons: 'Save' and 'Cancel'. A red mouse cursor is pointing at the 'Save' button.

Users can *rename* or *remove* saved filters from the *Manage Filters* section under the *Actions* drop down.

## 7: Subscribing to Published Filters

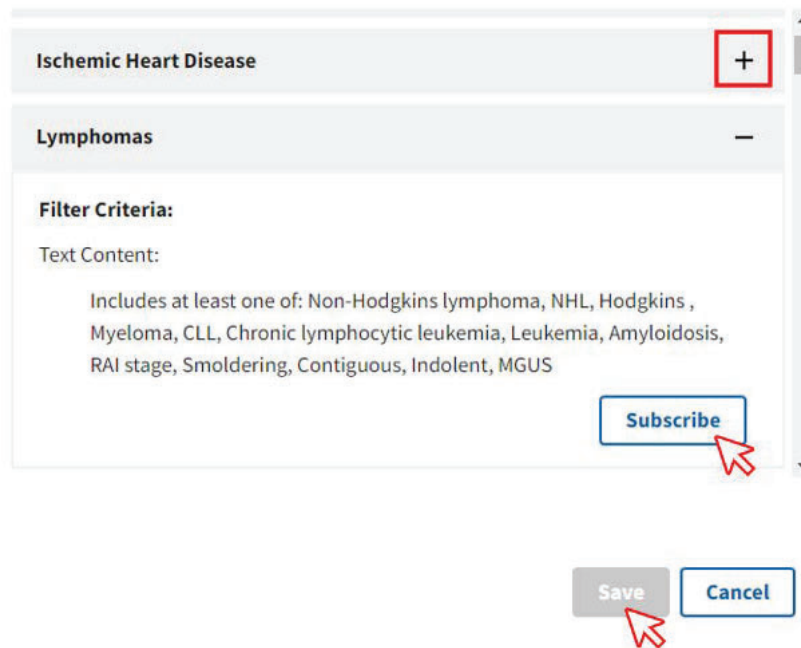
Users can save search time by subscribing to *published filters* found under the *actions drop down* on the left text search sidebar. Published filters will populate in a pop out for users to review details - details can be seen by electing the *plus symbol* next to filter name.

Users can subscribe to the filter by selecting the *subscribe* button and selecting *save*. Subscribed filters are available to users under the left text search sidebar *select drop down* and the *manage filters* action under the *actions drop down*.



The image shows a sidebar with two tabs: 'Filters' and 'Text Search'. Below the tabs, there is a message 'Some documents not OCR'ed'. A dropdown menu labeled 'Actions' is open, with 'Browse published filters' highlighted in red. Below the dropdown are several input fields with 'Add' buttons, and a 'Filter Results' button at the bottom.

### Published Filters



The image shows a pop-out window titled 'Published Filters'. It contains two filter entries: 'Ischemic Heart Disease' with a '+' icon and 'Lymphomas' with a '-' icon. Below the entries is a section for 'Filter Criteria' for 'Lymphomas', which lists various conditions. A 'Subscribe' button is highlighted with a red arrow. At the bottom of the window are 'Save' and 'Cancel' buttons, with a red arrow pointing to the 'Save' button.