

PSIP Job Aid: How to Review a Case for CORs

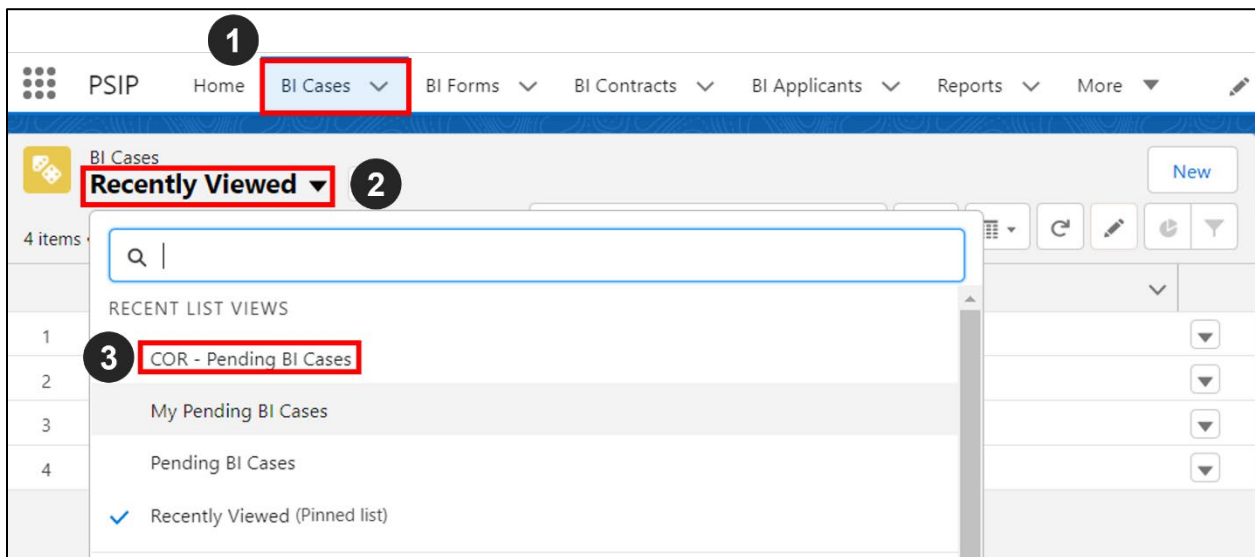
OBJECTIVE Train CORs how to review a BI case

AUDIENCE CORs

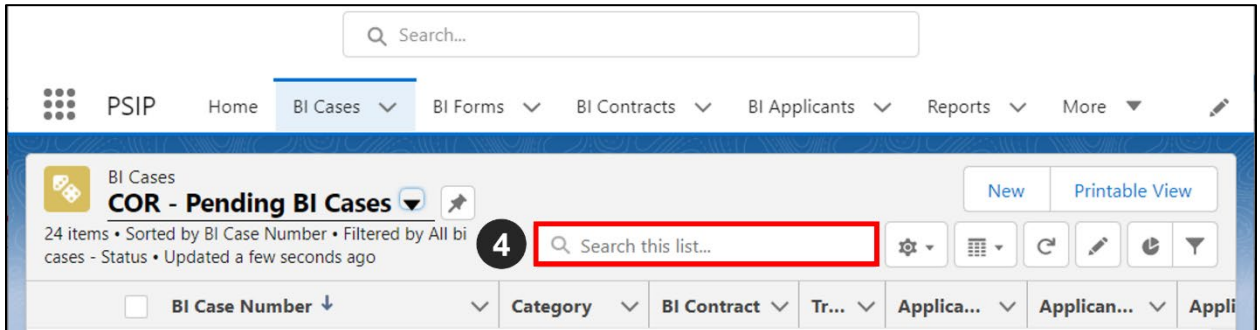
INSTRUCTIONS

Pre-Step: Access the Salesforce Homepage via <https://va-vet.my.salesforce.com/>.

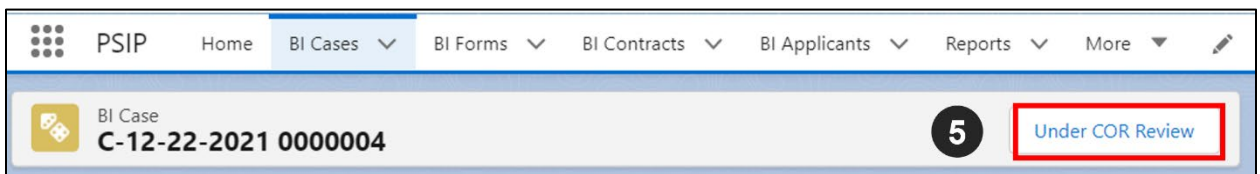
1. Select **BI Cases** in the tabs bar.
2. Click the drop-down icon next to **Recently Viewed**.
3. Click **COR – Pending BI Cases**.



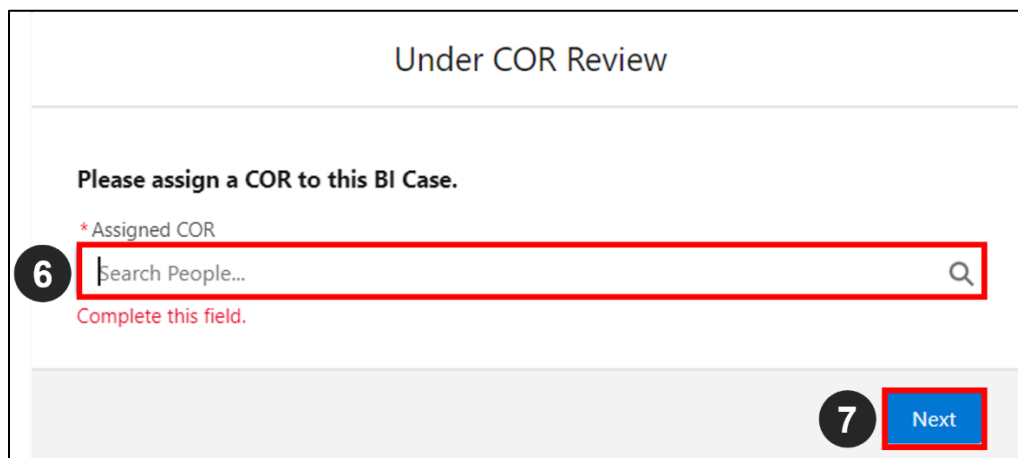
4. Select your relevant BI Case using the search bar.
Note: Additional option is to type in the applicant's name, if known, using the search bar.



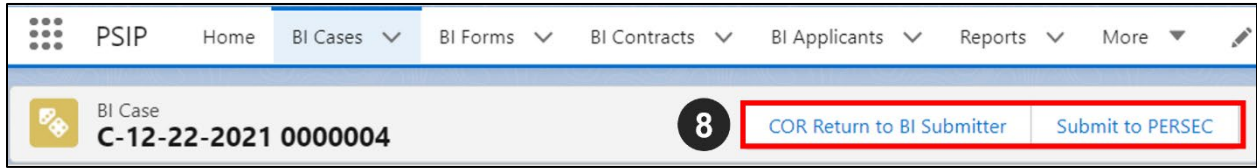
5. Click **Under COR Review** in upper righthand corner.



6. A pop-up window will appear to assign a COR to the BI Case. Use the search bar to assign.
7. Click **Next**.



8. Click **Submit to PERSEC** if case meets COR standards. If any corrections need to be made, click **COR Return to BI Submitter**.



The screenshot shows a web application interface with a navigation bar at the top. The navigation bar includes a grid icon, the text "PSIP", and several dropdown menus: "Home", "BI Cases", "BI Forms", "BI Contracts", "BI Applicants", "Reports", and "More". Below the navigation bar, there is a header section with a yellow icon of two dice, the text "BI Case", and the case ID "C-12-22-2021 000004". To the right of the case ID is a black circle containing the number "8". Further right, there are two buttons: "COR Return to BI Submitter" and "Submit to PERSEC". Both buttons are highlighted with a red rectangular border.

