

PSIP Job Aid: How to Review a Case for PSS & PERSEC Managers

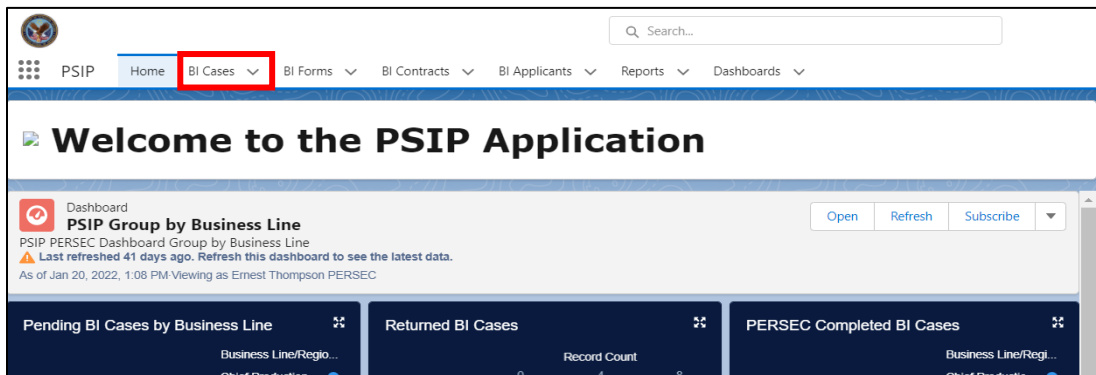
OBJECTIVE Train PSS & PERSEC Managers how to review BI Case

AUDIENCE PSS and PERSEC Managers

INSTRUCTIONS

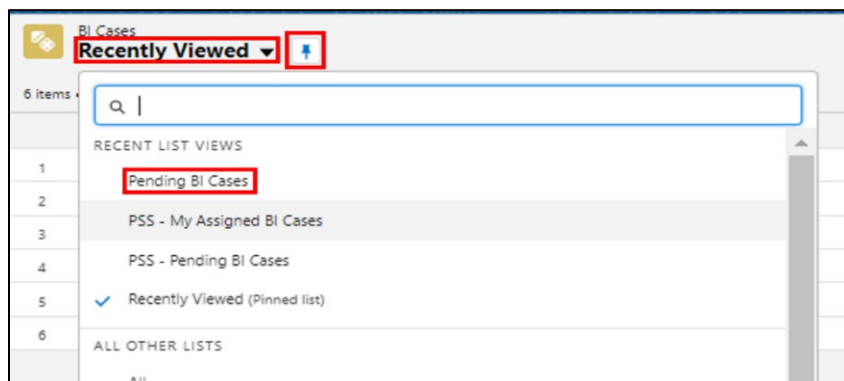
Pre-Step: Access the Salesforce Homepage via <https://va-vet.my.salesforce.com/>.

1. Click **BI Cases** in the tabs bar.



2. Search for the case you've been assigned. Select relevant case to open.

Note: If this is your first time accessing PSIP, you will need to change your list view from **Recently Viewed** to **Pending BI Cases** using the drop-down option. It is strongly suggested to pin this view using the pin icon for easier access in the future.



3. Scroll down to the **BI Case Tracking Information** section and click the pencil icon located next to the **Status** field to update the status of the case.

BI Case Tracking Information

Status	Assigned to PSS		Sub-Status		
Status Comments			Assigned PSS	Milton Anthony PSS	
COR Comments to Submitter			PERSEC Comments to Submitter		
Submission Date	1/3/2022		Completion Date		
Returned Date					

4. Change the status from **Assigned to PSS** to **Pending**.

5. Update the **Sub-Status** to **Received**.

BI Case Tracking Information

Status	4 Pending	Sub-Status	5 Received
Status Comments	<input type="text"/>	Assigned PSS	Milton Anthony PSS
COR Comments to Submitter		PERSEC Comments to Submitter	<input type="text"/>
Submission Date	1/3/2022	Completion Date	<input type="text"/>
Returned Date			

6. Click **Save** at the bottom of the page to save changes made. The status of the case will then be updated to **Pending**

Progress bar: Status: Pending

The progress bar consists of seven steps. The first six steps are green with a white checkmark, indicating they are completed. The seventh step is blue with the text 'Pending', indicating it is the current status. The eighth step is grey with the text 'Returned', and the ninth step is grey with the text 'Completed'.

Under **Personnel Security Provided Information** section, fill in the appropriate information:

7. Click into the blank field next to **Date Transmittal Notice Provided to COR** and select a date from the calendar that populates.
8. Click the dropdown menu entitled **SAC Adjudication Outcome** and select one of the following options: **Favorable** or **Unfavorable**.
9. Click the dropdown menu entitled **Final Adjudication Status** and select one of the following options: **Favorable**, **Unfavorable**, or **Discontinued**.

Personnel Security Provided Information	
Date Assigned to PerSec	
Date Submitted to PERSEC	3/9/2022
Quality Control Decision	
Date of CVS/PIPS Previous BI Check	
Date of SAC Adjudication and QC	
BI Decision	
ROI Received	<input type="checkbox"/>
Date Transmittal Notice Provided to COR	
SAC Adjudication Outcome	
Date Accepted by PERSEC	
Date Rejected by PERSEC	
Quality Control Comments	
Date eQIP Initiated	
Date eQIP Approved	
Date Record closed out in CVS/PIPs	
Date Suitability Granted / Located	
Date of BI Files Upload to CABS/PSAC	
Final Adjudication Status	

BI Case Tracking Information	
Status	Pending PSS Assignment
Status Comments	
COR Comments to Submitter	
Submission Date	3/9/2022
Returned Date	
Sub-Status	
Assigned PSS	
PERSEC Comments to Submitter	
Completion Date	

10. Click **Save** at the bottom of the page.

11. Click **Complete BI Case** in the top right-hand corner.

12. A confirmation message will appear that the case has been completed. The decision will be communicated in a separate email. Click **Finish**.



13. The case's status will update to **Completed**.

