

PSIP Job Aid: How to View Case Status

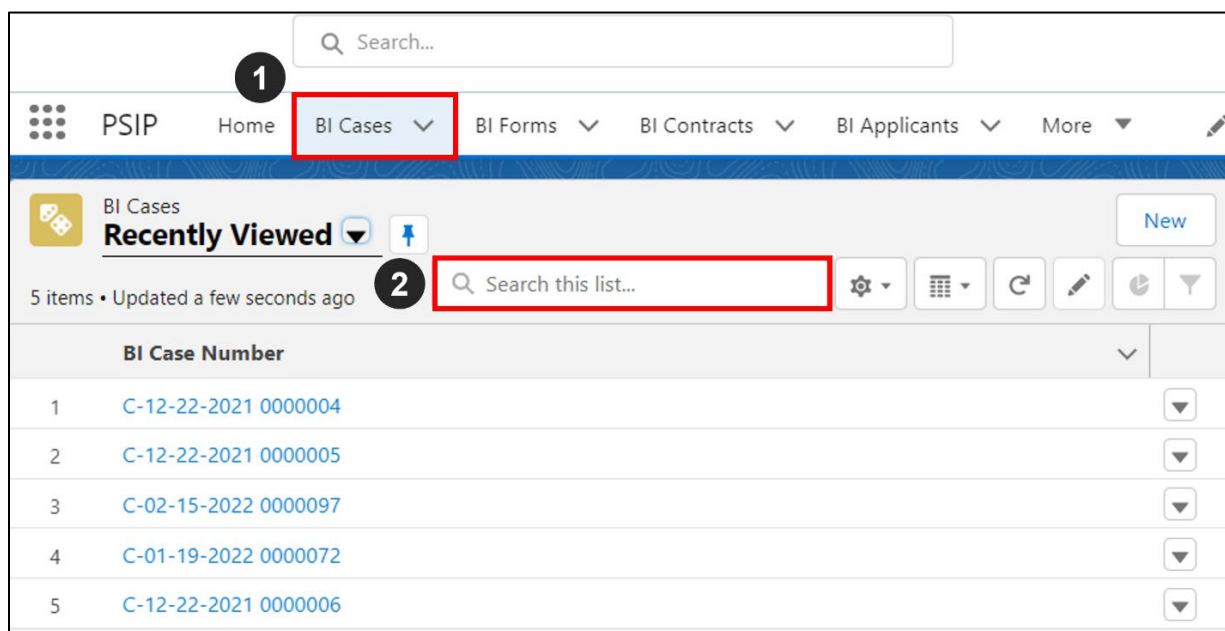
OBJECTIVE Train users on how to view a case's status

AUDIENCE All Users

INSTRUCTIONS

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

1. Select **BI Cases** in the tabs bar.
2. Select the relevant BI Case by typing case number into the search bar.



The screenshot shows the Salesforce interface for BI Cases. The navigation bar at the top includes tabs for PSIP, Home, BI Cases (highlighted with a red box and a circled '1'), BI Forms, BI Contracts, BI Applicants, and More. Below the navigation bar, the BI Cases section is displayed with a 'Recently Viewed' filter and a search bar (highlighted with a red box and a circled '2'). The search bar contains the text 'Search this list...'. Below the search bar, there is a table with the following data:

BI Case Number	
1	C-12-22-2021 0000004
2	C-12-22-2021 0000005
3	C-02-15-2022 0000097
4	C-01-19-2022 0000072
5	C-12-22-2021 0000006



- Once the relevant case is selected, the screen will show all details about the case. The status bar will appear at the top of the screen. This bar shows where the case currently is in the overall process.

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The screenshot displays a web interface for a BI Case. At the top, the case ID is C-12-22-2021 0000004. A status bar below it shows a sequence of steps: Pending COR Review (highlighted in blue), Pending PSS A..., Assigned to PSS, Pending, Returned, and Completed. The current status is Pending COR Review. Below the status bar, there are tabs for Details and Files. The Details section is expanded to show General BI Case Information, including fields for BI Case Number, BI Contract, Category, Transfer Type, Applicant Type, and Submitter Comments.

BI Case
C-12-22-2021 0000004

✓ ✓ Pending COR ... Pending PSS A... Assigned to PSS Pending Returned Completed

Status: Pending COR Review

Details Files

General BI Case Information

BI Case Number	C-12-22-2021 0000004	Transfer Type	
BI Contract	P-00000001	Applicant Type	Contractor
Category	Onboarding	Submitter Comments	

Applicant Provided Information

