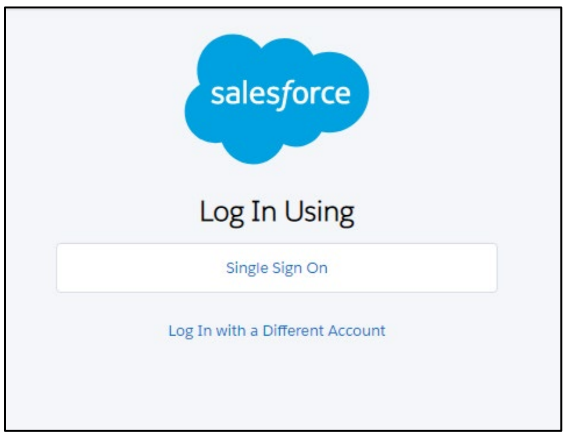
PSIP Job Aid:
How to Log in and Navigate PSIP

OBJECTIVE Train users to log in to and navigate the PSIP application

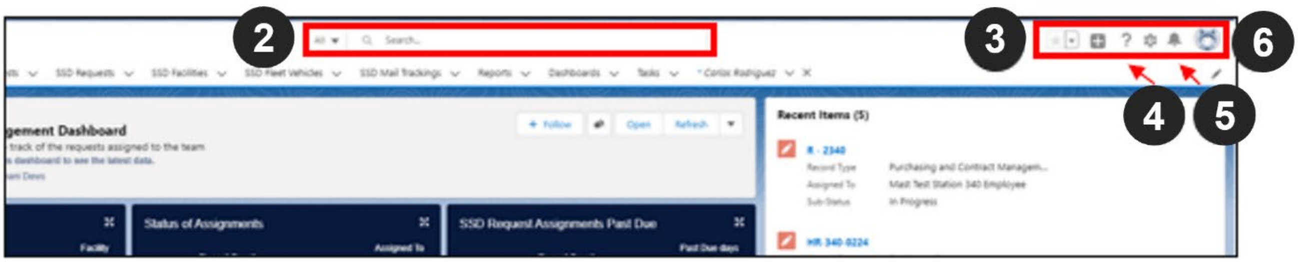
AUDIENCE All Users

INSTRUCTIONS

1. Access the PSIP application via https://va-vet.my.salesforce.com/. Log in by clicking **Single Sign On.** The user must select **Accept** under **Authorized Use Only.** Upon successful log-in, users will automatically be taken to their homepage. A pop-up message may appear requesting your phone number.
   Note: The application works best using Google Chrome.



2. The **Search Bar** allows you to type in any key terms or phrases to pull up all related results within the system. Use the arrow on the Search Dropdown to the left to specify the search criteria.
3. Click **Favorites** to see your list of favorited items.
   Note: Add favorites by clicking on the star when on that specific page.
4. **Salesforce Help** allows users to access available resources and documentation.
5. See **Notifications** for any requests or actions that need to be taken.
6. Users can view and update settings by clicking on **Account Information**.



7. The tabs bar can be used to navigate and execute various actions in PSIP:
   Note: The tabs bar reflects differently depending on the persona.

   - **BI Cases:** Store general BI case information
   - **BI Forms:** Access and create BI forms
   - **BI Contracts:** Create new contracts and import existing BI contracts
   - **BI Applicants:** Create and view BI applicants
   - **Reports:** Create, share, and store reports by category
   - **Dashboards:** The majority of the PSIP homepage will be populated by dashboards that are customized to each individual's role requirements