

PSIP Job Aid: How to Assign a Case for PERSEC Managers

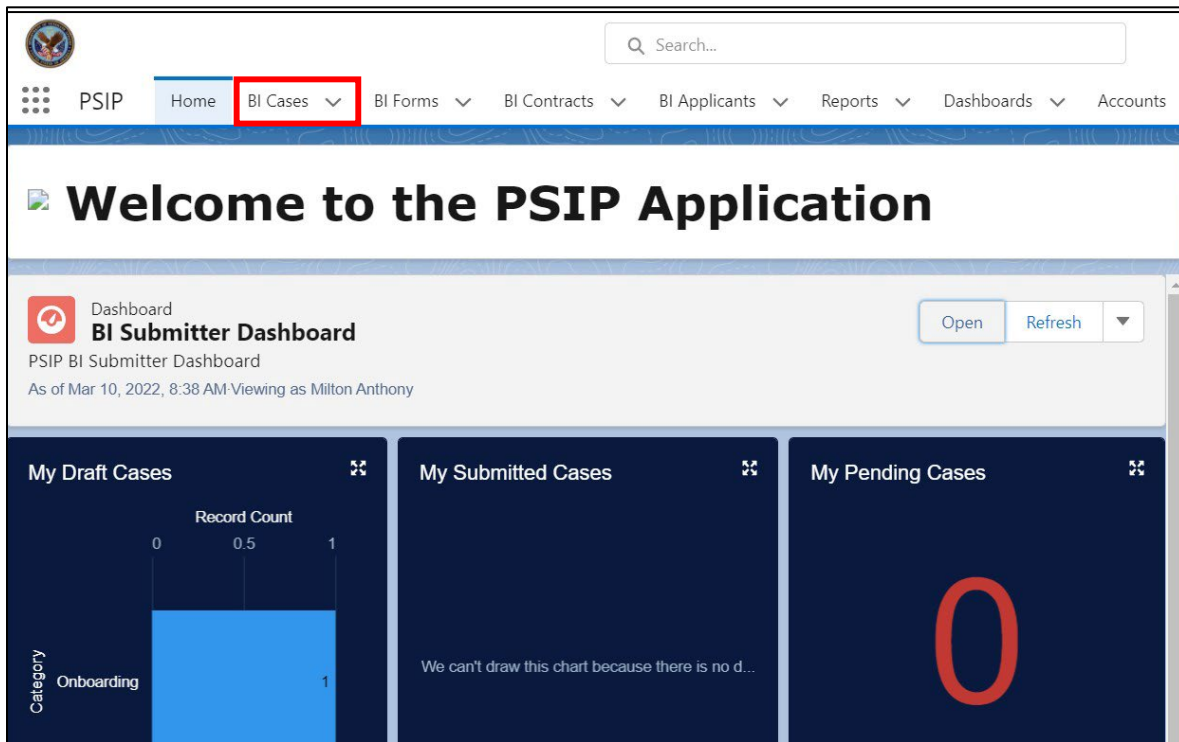
OBJECTIVE Train PERSEC Managers on how to assign a BI Case to a PSS

AUDIENCE PERSEC Managers

INSTRUCTIONS

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

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

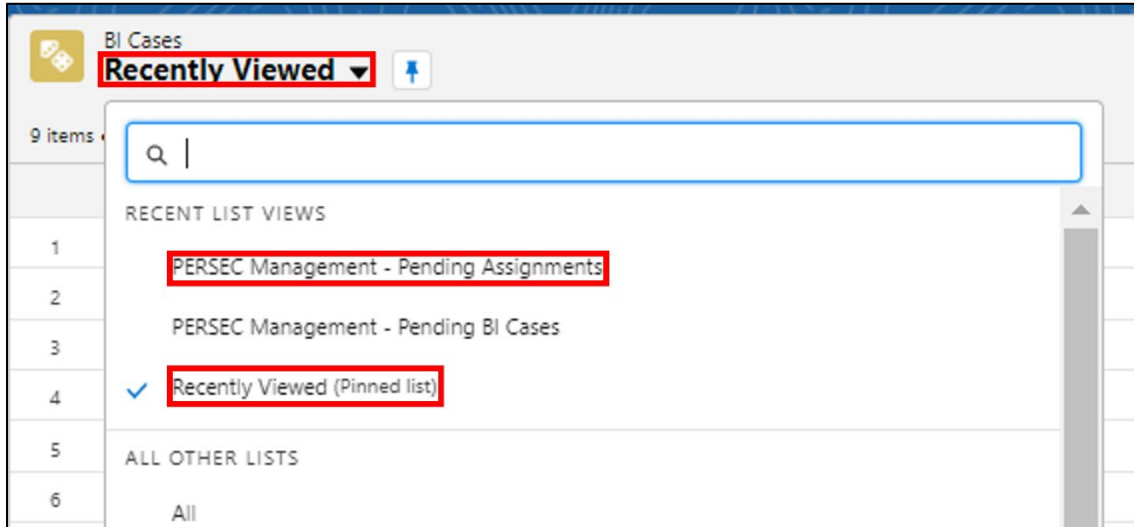


The screenshot shows the Salesforce interface for the PSIP Application. At the top, there is a search bar and a navigation bar with tabs: PSIP, Home, BI Cases (highlighted with a red box), BI Forms, BI Contracts, BI Applicants, Reports, Dashboards, and Accounts. Below the navigation bar, the main content area displays a 'Welcome to the PSIP Application' message. Underneath, there is a 'Dashboard BI Submitter Dashboard' section with 'Open' and 'Refresh' buttons. The dashboard includes three panels: 'My Draft Cases' with a bar chart showing 1 record for 'Onboarding', 'My Submitted Cases' with a message 'We can't draw this chart because there is no d...', and 'My Pending Cases' with a large red '0'.



2. Search the case you need to assign after clicking **PERSEC Management – Pending Assignments**. Click the 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 **PERSEC Management – Pending Assignments** using the drop-down icon. 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 **Assigned PSS** field.



- Click in the empty field. Search and select the name of the PSS who will be reviewing the case.

Note: If you will be personally handling the case, assign it to yourself.

BI Case Tracking Information

| | | | |
|---------------------------|---------------------------------------|------------------------------|---------------------------------------|
| Status | Pending PSS Assignment | Sub-Status | --None-- |
| | View all dependencies | | View all dependencies |
| Status Comments | | Assigned PSS | Search People... |
| COR Comments to Submitter | test | PERSEC Comments to Submitter | |
| Submission Date | 1/20/2022 | Completion Date | |
| Returned Date | 1/20/2022 | | |

- Click **Save** at the bottom of the page to save changes made.

- The status of the case will be updated to **Assigned to PSS**.

Status: Assigned to PSS

Note: The PSS will then receive an email letting them know they have been assigned a case that is ready to be reviewed. The PERSEC Manager will be notified once the review is complete.

