

PSIP Job Aid: How To Create a Case

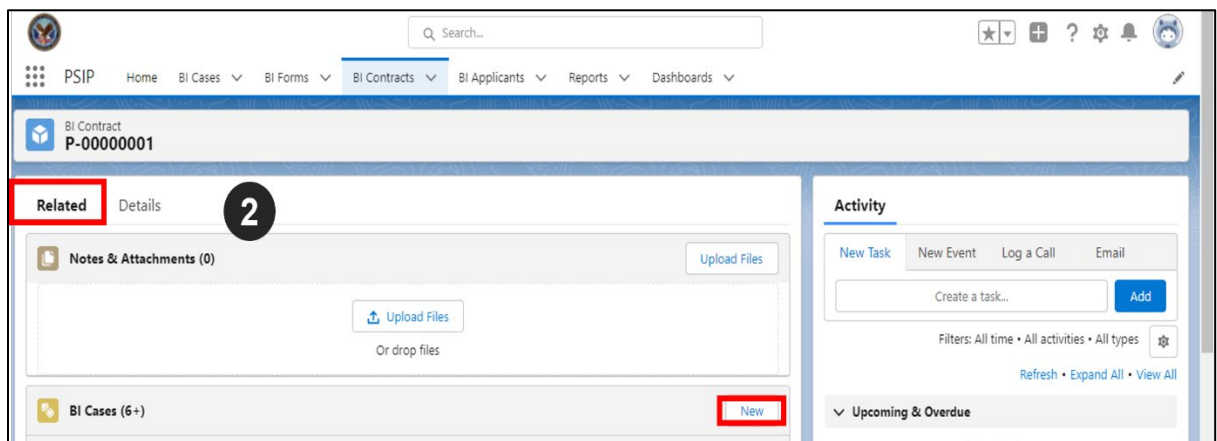
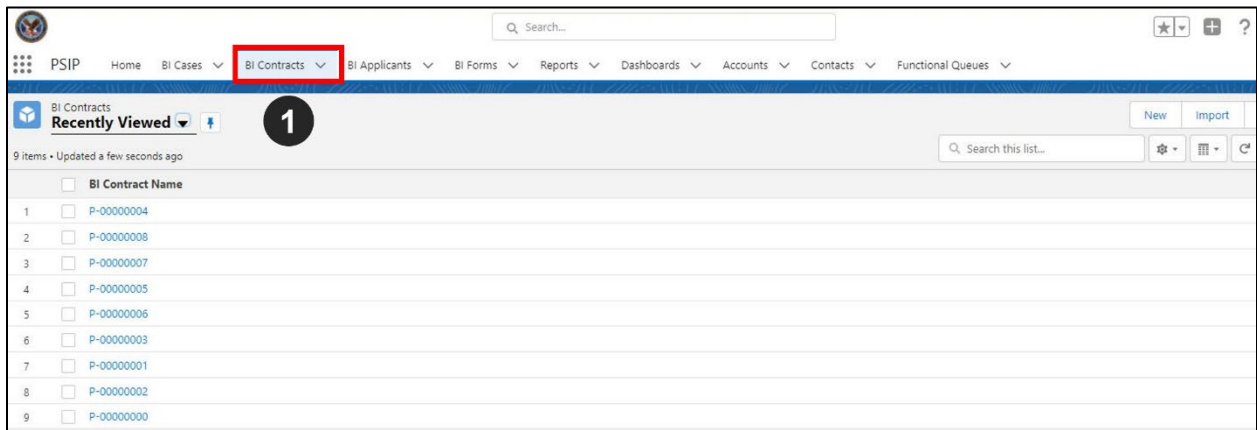
OBJECTIVE Train users to create a BI case

AUDIENCE Contractor POCs and CORs

INSTRUCTIONS

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

1. Select **BI Contracts** in the tabs bar and select relevant contract.
2. Click **Related**, then select **New** next to BI Cases.



3. A new window will appear where you will need to enter information into the following required fields:
 - a. BI Contract – this field will already be prepopulated with your contract number
 - b. Category
 - c. Applicant Type
 - d. Applicant Name – Click into field, then select **+ New BI Applicant**, and enter applicant’s data into the fields. Be sure to select the appropriate contracting company and contract.
4. Click **Save**. Your case is now created and in draft phase.

Note: Do not manually update case statuses when submitting a case. If the buttons are not used then the case will not get assigned to a queue and will not be visible to the PERSEC Team. The only fields that need to be filled when creating a case are the ones in red.

The screenshot shows a web form titled "New BI Case" with three main sections: "General BI Case Information", "Applicant Provided Information", and "COR Provided Information".

- General BI Case Information:**
 - BI Case Number: [Text field]
 - Transfer Type: [Dropdown menu with "--None--" selected]
 - * BI Contract: [Search field with "Search BI Contracts..." and a magnifying glass icon, highlighted with a red box and labeled 'a']
 - * Category: [Dropdown menu with "--None--" selected, highlighted with a red box and labeled 'b']
 - * Applicant Type: [Dropdown menu with "--None--" selected, highlighted with a red box and labeled 'c']
 - Submitter Comments: [Text area]
- Applicant Provided Information:**
 - * Applicant Name: [Search field with "Search BI Applicants..." and a magnifying glass icon, highlighted with a red box and labeled 'd']
 - Applicant Company Name: [Text field, note: "This field is calculated upon save"]
 - Applicant Email: [Text field, note: "This field is calculated upon save"]
- COR Provided Information:**
 - Assigned COR: [Text field]
 - Buttons: "Cancel", "Save & New", "Save" (highlighted with a red box and labeled '4'), and "Listed".



Applicant Provided Information

* Applicant Name

Applicant Company Name
This field is calculated upon save

+ New BI Applicant **d** Applicant Email
This field is calculated upon save

Hidden Assigned COK

This field is calculated upon save

d New BI Applicant

Applicant (Last Name, First Name)

* Applicant SSN

* Applicant Email

Contracting Company

* BI Contract

Active?

Owner Sherri Salisbury POC

* Date of Birth

* City of Birth

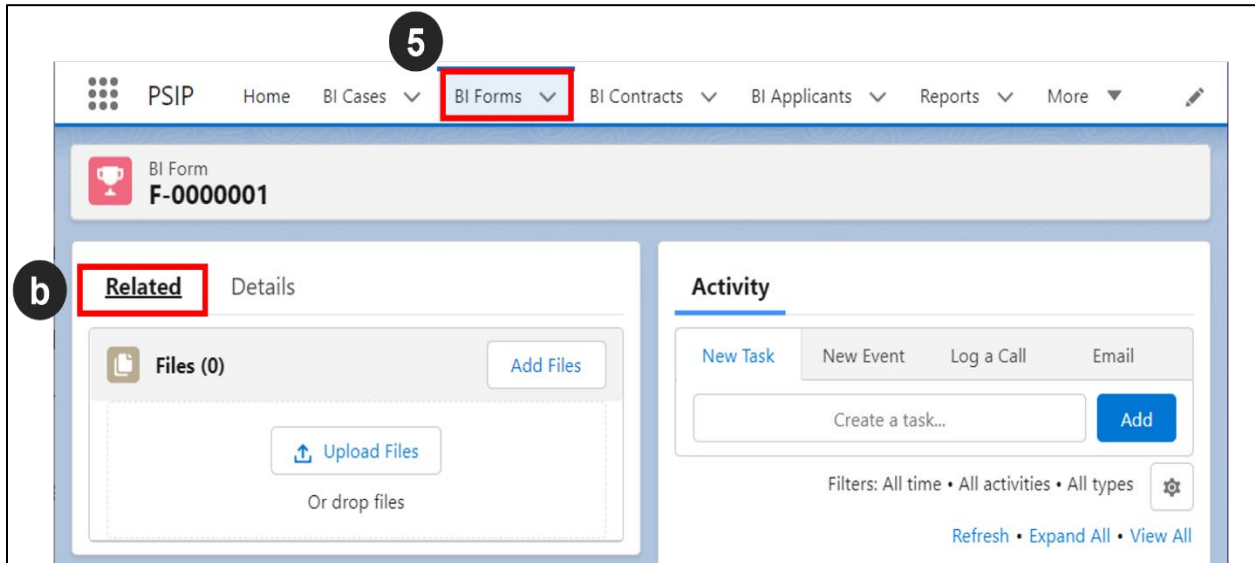
* Country of Birth --None--

* State of Birth --None--

* Citizenship --None--

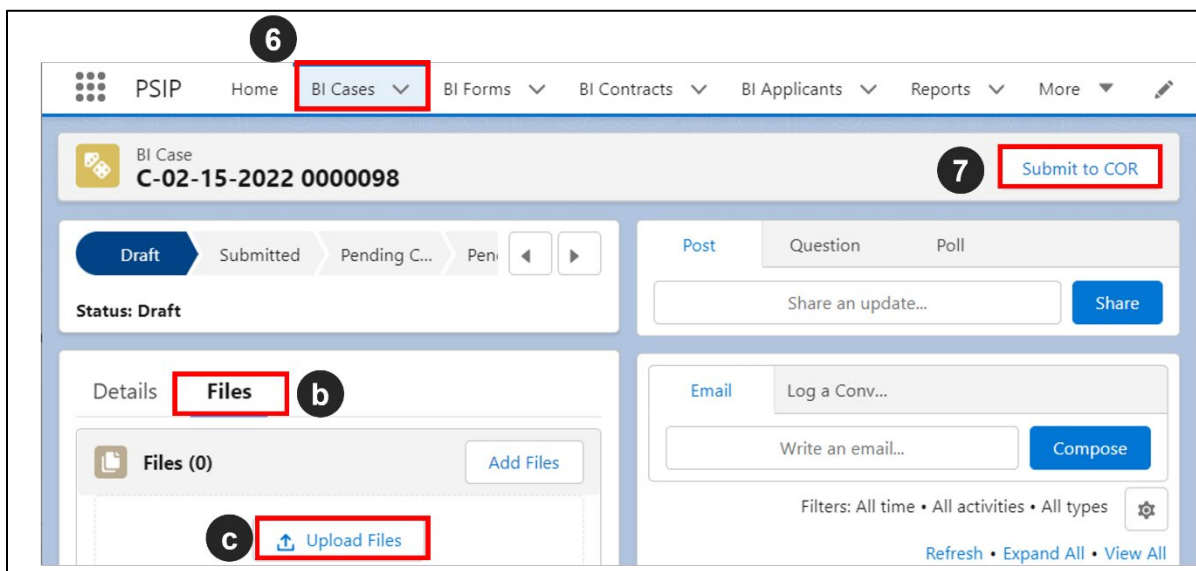


5. If you need to provide the applicant with any BI forms, click on **BI Forms** tab.
 - a. Click on the relevant form.
 - b. Click **Related**.
 - c. Download relevant forms and email to applicant.



6. If you need to Upload any completed files by the applicant, click on **BI Cases** tab.
 - a. Click on the relevant case.
 - b. Click **Files**.
 - c. Click **Upload Files** to upload the completed files.

7. Click **Submit to COR** in the upper right-hand corner.



8. A pop-up window will ask you to acknowledge if the applicant has completed their VA trainings. Although not required to create a case, these trainings will need to be completed for the case to be considered complete and fully submitted. Click **Next**.

Submit to COR

Please acknowledge the following trainings have been completed and certificates provided:

10176 - VA Privacy and Information Security Awareness & Rules of Behavior Certificate

10203 - Privacy and HIPAA Training Certificate

[Next](#)

9. The following prompt will ask you to confirm if all required forms were uploaded in the Files tab. Although not required to create a case, all required forms must be completed for the case to be considered complete and fully submitted. Check the box if they have been completed or leave blank if not. Click **Next**.

Submit to COR

Please confirm that all required forms have been uploaded in the Files tab.

[Next](#)



10. Click **Finish** button to submit. Once submitted, the COR will receive an automated email notification. The submitter will also receive a notification saying the case was submitted successfully.

Submit to COR

Please upload all required forms.

[Finish](#)

