PSIP Job Aid:
How To Create a Case

OBJECTIVE Train users to create a BI case

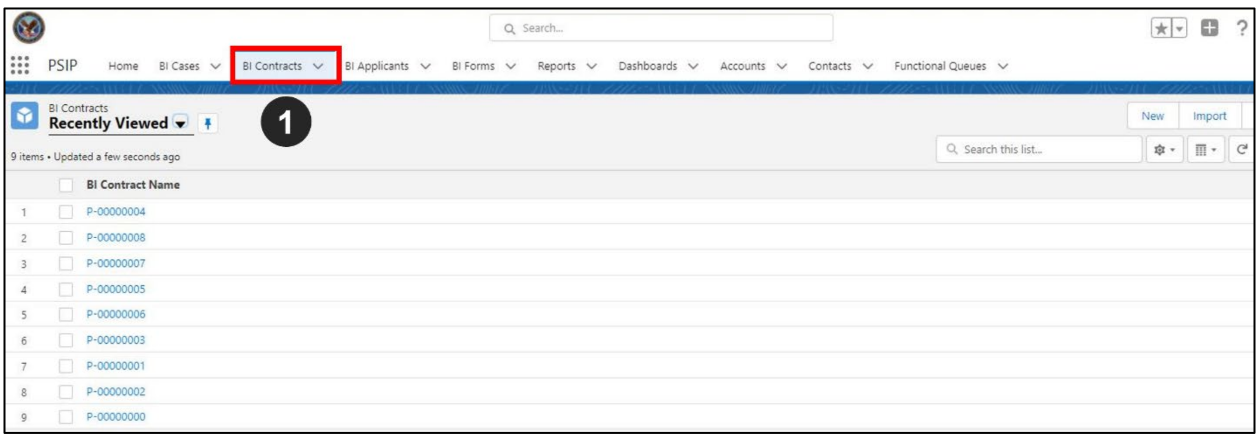
AUDIENCE Contractor POCs and CORs

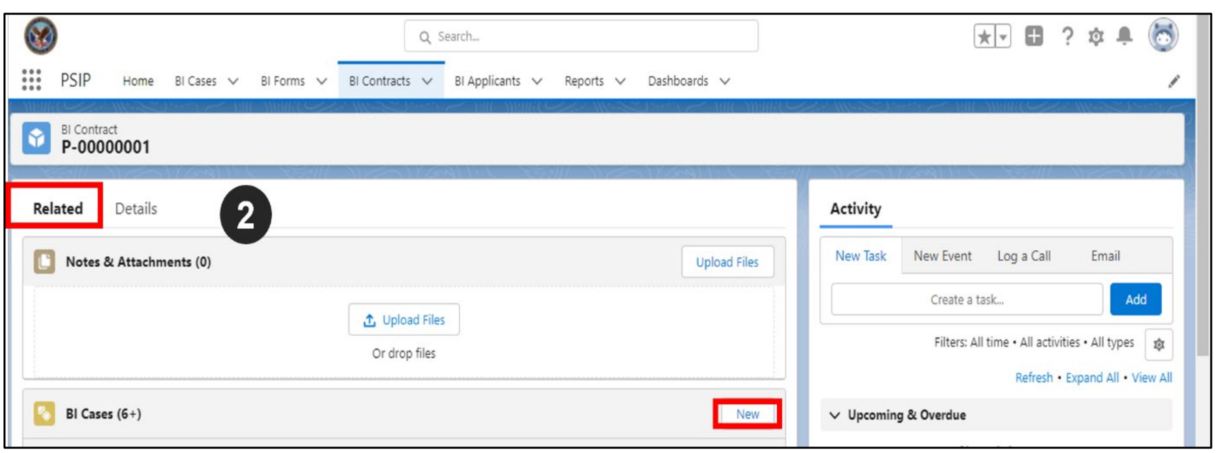
INSTRUCTIONS

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

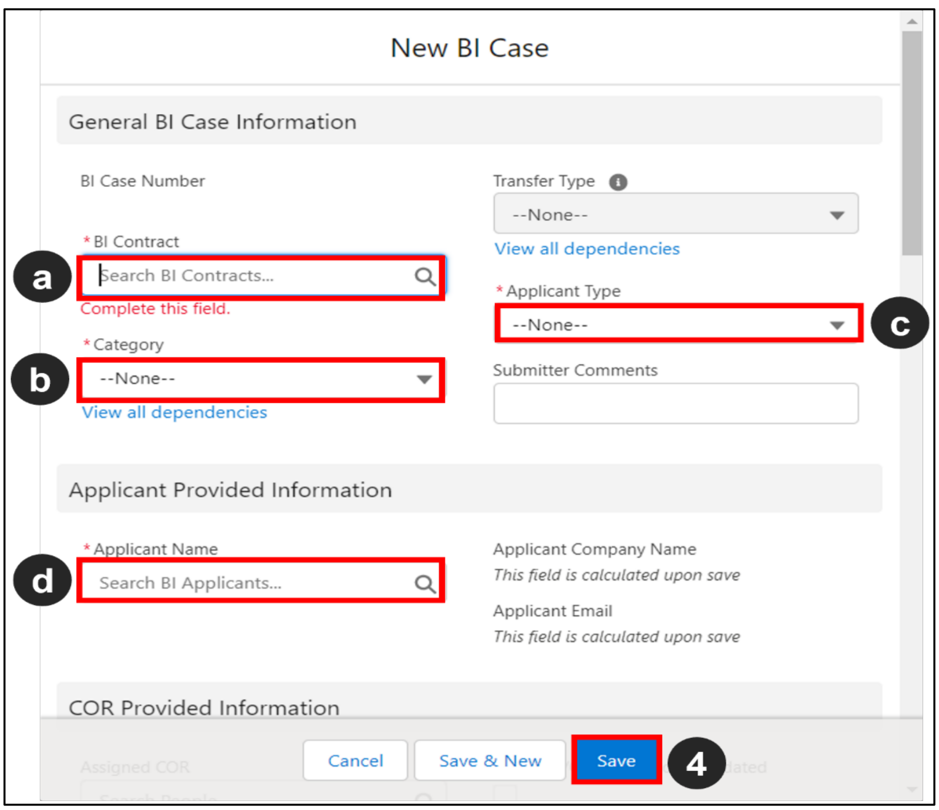
    b. Category

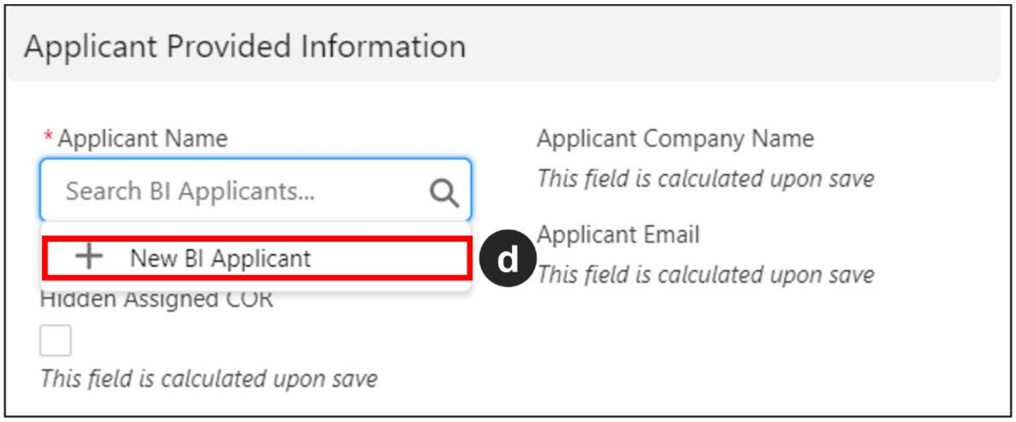
    c. Applicant Type

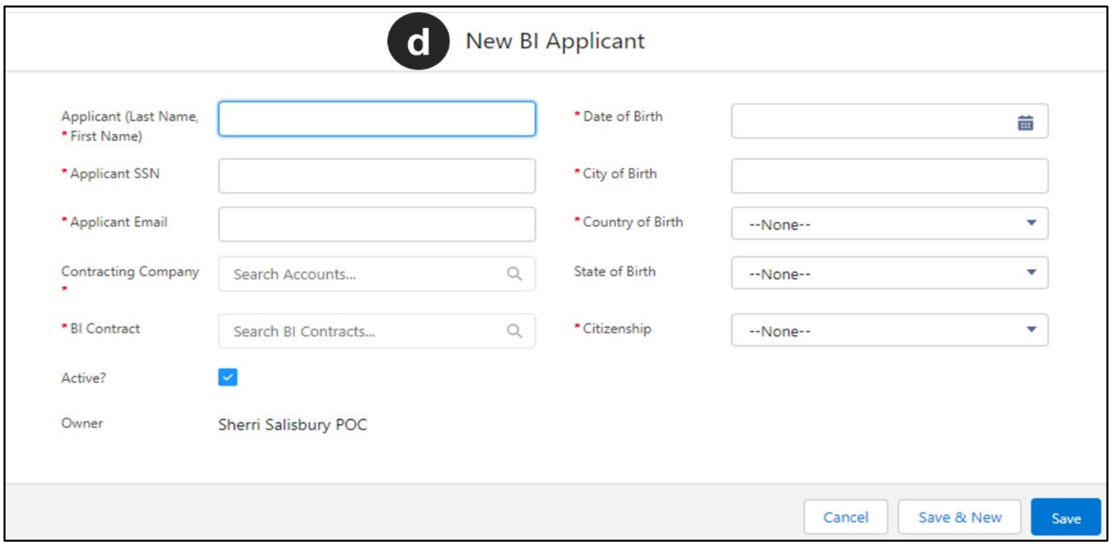
    d. Applicant Name – Click into field, then select **+ New BI Applicant**, and enter applicant's data into the fields. Be sure to select the appropriate contracting company and contract.

4. Click **Save**. Your case is now created and in draft phase.

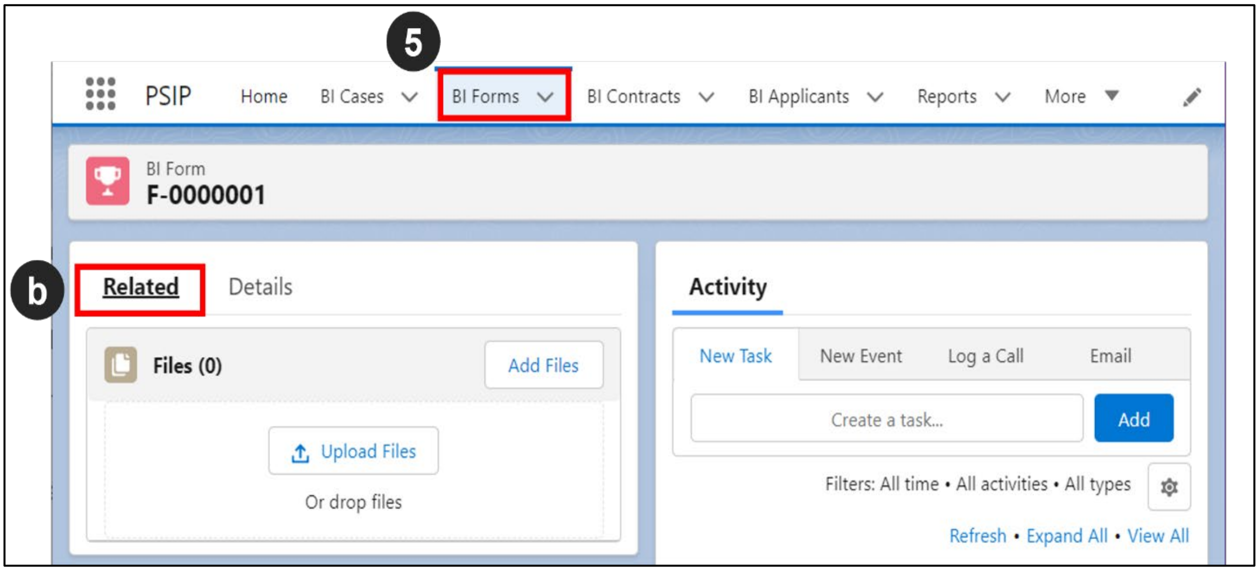
    Note: Do not manually update case statuses when submitting a case. If the buttons are not used then the case will not get assigned to a queue and will not be visible to the PERSEC Team. The only fields that need to be filled when creating a case are the ones in red.




Applicant Provided Information
* Applicant Name
Search BI Applicants...
New BI Applicant
d
Hidden Assigned COR
This field is calculated upon save
Applicant Company Name
This field is calculated upon save
Applicant Email
This field is calculated upon save

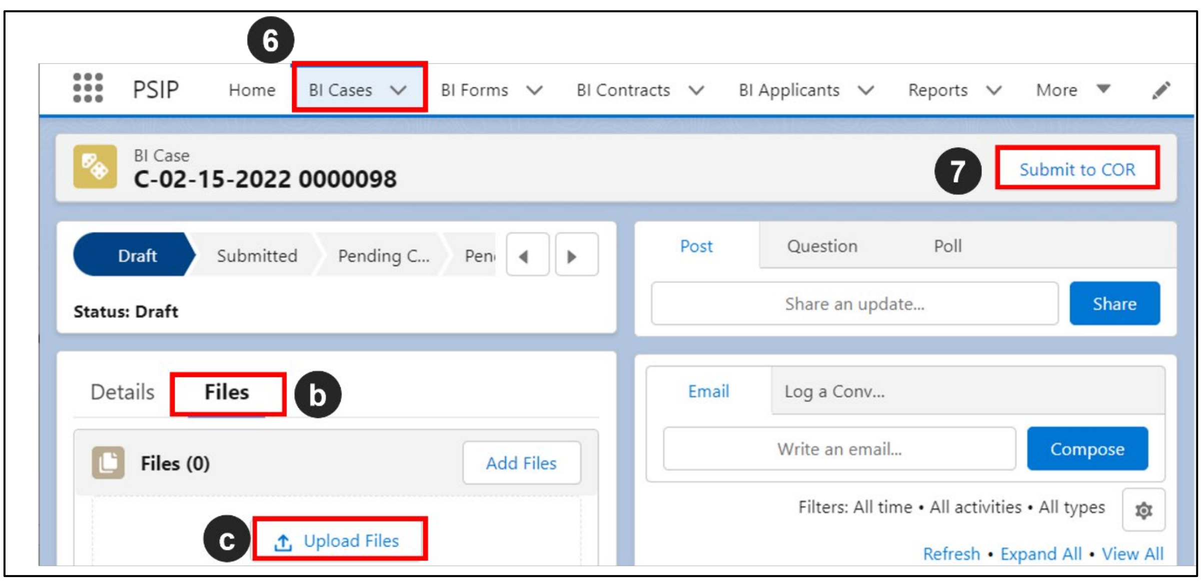

d
New BI Applicant
Applicant (Last Name, * First Name)
* Applicant SSN
* Applicant Email
Contracting Company *
Search Accounts...
* BI Contract
Search BI Contracts...
Active?
Owner
Sherri Salisbury POC
* Date of Birth
* City of Birth
* Country of Birth
--None--
State of Birth
--None--
* Citizenship
--None--
Cancel
Save & New
Save

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.

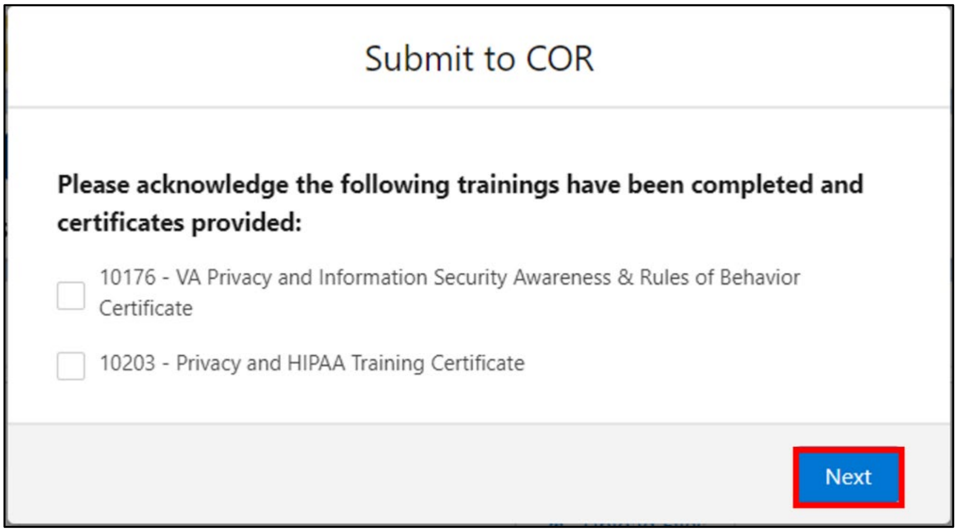


6. If you need to Upload any completed files by the applicant, click on **BI Cases** tab.
    a. Click on the relevant case.
    b. Click **Files.**
    c. Click **Upload Files** to upload the completed files.

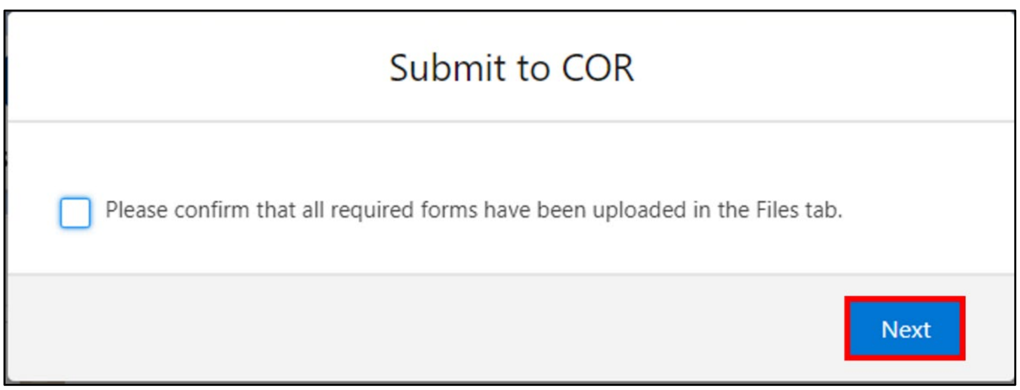
7. Click **Submit to COR** in the upper right-hand corner.



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.**



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.**



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.