



KONICA MINOLTA

KMBS

ECM

PROFESSIONAL SERVICES

**DVS - VSO
ONBASE USER GUIDE**

Table of Contents

Web Client Login	4
Working with Veterans	4
Basic Info	5
Service Info.....	6
Contact Info.....	7
Relationships View	7
Related Items View	8
Working with Applicants.....	9
Basic Info	10
Contact Info.....	10
Pairing an Applicant to a Veteran	11
VS-1 Applications	13
Create a VS-1.....	13
Initiate Refund	20
What to do when a Veteran Passes Away	20
VS-21A Applications.....	25
Creating a VS-21A Application	27
Entering Benefits.....	27
Submitting VS-21As for Approval.....	28
Completing the VS-21A.....	29
Escalating VS-21As	29
Amending Open Benefits	30
Working with Periods.....	34
Close a Period.....	34
Filter Bars and Filters	36
Financial Assistance Cases Filter Bar	36
Veterans and Applicants Filter Bar.....	37
Period Management Filter Bar.....	37
Attribute Constraints	37
Wildcard	38
Dates	39
WorkView Basics.....	41

Attribute indicators.....	43
Embedded filters.....	44
Formatted Text	44
Documents.....	45
Viewing Documents	45
<i>Static folder</i>	45
Importing Documents	46

Web Client Login

<https://massdvs.hylandcloud.com/203IDP/>

Enter your Username, Password and click the Login button.

Hyland IdP

Login

Username
[]

Password
[]

Login Cancel

External Login

SAML

Working with Veterans

If not already in WorkView, click on the (3) horizontal lines icon and choose **Open WorkView**.

Document Retrieval

Document Types

Q

DVS - MIS

- DVS - Agreement to Reimburse Letter
- DVS - Appeals
- DVS - Authorization for Release Letter

Document Retrieval

DOCUMENT

- Document Retrieval
- Import Document
- Batch Indexing
- Documents Checked Out

WORKFLOW

- Open Workflow

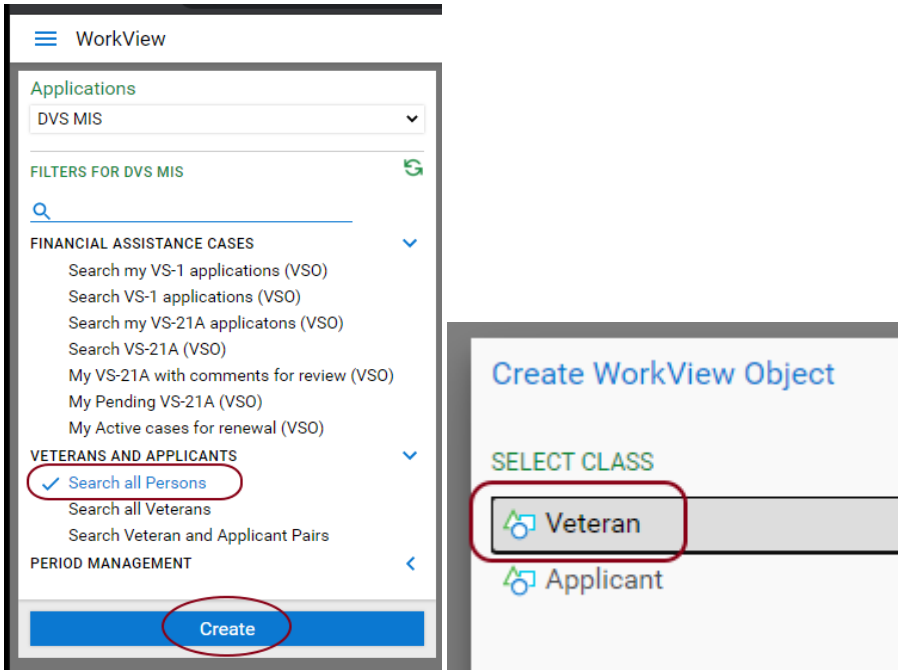
WORKVIEW

- Open WorkView

KNOWLEDGE TRANSFER

- Open Knowledge Transfer

Click on the **Search All Persons** filter bar, click on **Create** and choose the **Veteran**.



Basic Info

Be sure to complete all three sections as it is important to capture as much information as possible.

The screenshot shows the 'Veteran Detail' form for Carl M. Jr. McKinney. The form includes fields for Last Name, First Name, MI, Suffix, Full Name, SSN, Date of Birth, Date Deceased, Gender, Spoken Language, and US Citizen. There are also checkboxes for 'Is Enabled' and 'Director Override'. The 'Ethnicity/Race' section includes checkboxes for various racial categories and 'Special Circumstances'.

Veteran Detail* Relationships Related Items			
Veteran - McKinney, Carl M Jr			
Basic Info			
Last Name*	First Name*	MI	Suffix
McKinney	Carl	M	Jr
Full Name		<input checked="" type="checkbox"/> Is Enabled	
McKinney, Carl M Jr			
SSN	Date of Birth	Date Deceased	<input type="checkbox"/> Director Override - this person is verified to be alive
012-34-5678	2/28/1985		
Gender*	Spoken Language	US Citizen*	
Male	English	Yes	
Ethnicity/Race: This information is collected to make sure everyone is treated fairly. Your answer is voluntary.			
Race (Check all that apply)		Special Circumstances (Check all that apply)	
<input checked="" type="checkbox"/> American Indian or Alaskan Native		<input type="checkbox"/> Physical/Mental Impairment	
<input type="checkbox"/> Asian		<input type="checkbox"/> Hearing Impaired	
<input type="checkbox"/> Black or African American		<input type="checkbox"/> Visually Impaired	
<input type="checkbox"/> Hispanic or Latino		<input type="checkbox"/> Interpreter Required	
<input type="checkbox"/> Native Hawaiian or other Pacific Islander		<input type="checkbox"/> Sign Language Required	
<input type="checkbox"/> White		Other	
Other			

Name

When creating or working with any veteran, First Name and Last Name are required. Once saved, the Full Name will be updated to the format [Last Name], [First Name] [MI], [Suffix]

Basic Info		
Last Name*	First Name*	MI
<input type="text" value="Mackenzie"/>	<input type="text" value="Mason"/>	<input type="text"/>
Full Name		<input checked="" type="checkbox"/> Is Enabled
<input type="text" value="Mackenzie, Mason"/>		

Is Enabled

Is Enabled

Veteran records are visible by other departments (i.e SAVE Team, Annuity Team). If you determine a particular veteran record is a duplicate and should no longer be used you can uncheck this box. Unchecking the “Is Enabled” box will prevent new VS-1 applications from being created in relation to this veteran.

Service Info


Service Info		
Branch Of Service*	Service Start Date	Service End Date
<input type="text" value="Air Force"/>	<input type="text" value="12/14/2013"/>	<input type="text" value="12/14/2017"/>
Discharge Type		
<input type="text" value="Honorable discharge"/>		
DD-214		
<input type="text" value="5/4/2021 - DVS - Birth Certificate for Case # - Veteran: MCKINNEY CARL - Applicant:"/>		
<input checked="" type="checkbox"/> Wartime Service <input checked="" type="checkbox"/> Wartime Service has been determined		
MOS/Rating/AFSC		
<input type="text"/>		
Unit(s) Served In		
<input type="text"/>		

DD-214



DD-214



This control allows you import and view the veteran’s DD-214. Click the  **Import button** to import a DD-214.

You can use the  **Find button** to select an already existing document. If the DD-214 field has a value in it, you can double click it to open the document for viewing.

DD-214



Wartime Service

Wartime Service Wartime Service has been determined

When a veteran record is initially saved, the system will use the service dates to determine if the veteran served at least 90 days and at least one of those days was during a recognized period of war. If the veteran meets the criteria, then **“Wartime Service”** will be automatically checked. If you believe the **“Wartime Service”** is incorrect you can uncheck the box **“Wartime Service has been determined”** and save the record to force the system to reevaluate.

Contact Info

Please complete all fields in this section.

Contact Info			
Phone Number	Email Address		
(123)456-7890			
Phone Type	<input type="checkbox"/> Is willing to receive text messages	Email Type	
Cellular			
Street 1*			
65 Lambert Ave.			
Street 2			
Apt 1			
City*	State*	Zip Code	
Boston	MA	02119	

Relationships View

[Veteran Detail*](#) [Relationships](#) [Related Items](#)

The **“Relationships”** view is where you pair an existing veteran record with an existing applicant record. Creating the veteran/applicant relationship is necessary when initiating a VS-1 application where a person other than the veteran is the applicant. **Important Note:** You must create the Applicant before pairing (see Working with Applicants).

Click the **+** **“Create Object”** button to create a new relationship. The new relationship will be displayed, and you can select the applicant from the list of existing applicants.

[Veteran and Applicant Detail*](#)



Bravo, Billy (Vet) - Bravo, Betty (Applicant)

Veteran and Applicant Detail

Veteran Name*	SSN	Date of Birth	
Bravo, Billy	111-11-1155	1/1/1970	
Applicant Name*	SSN	Date of Birth	Relationship To Veteran*
Bravo, Betty	111-11-1116	1/1/1970	Widow



In the example below, you can see the veteran Billy Bravo has a widow Betty Bravo, who is the applicant.

Enter only the person who will serve as an applicant for benefits. Do not enter all family members.
You must create the Applicant before you can create the relationship.

Veteran and Applicant			
	Veteran	Applicant	Relationship to Veteran
	Bravo, Billy 	Bravo, Betty 	Widow

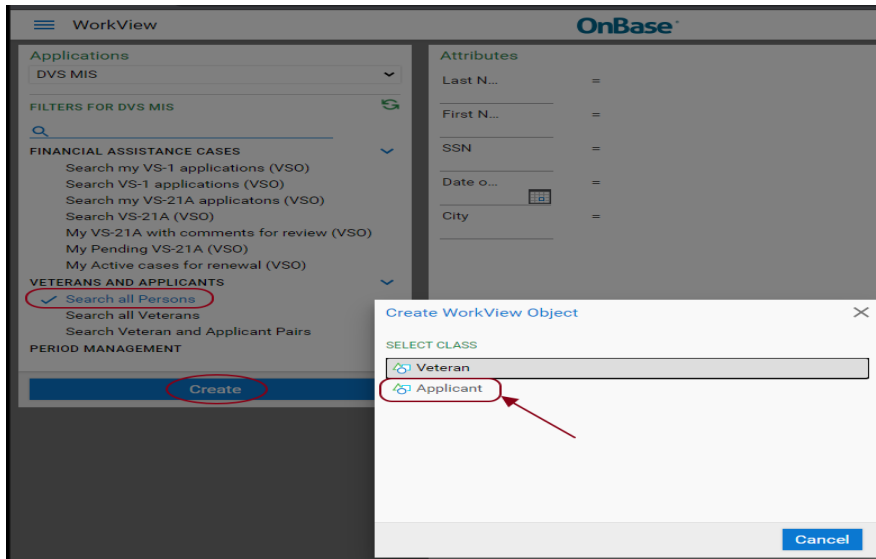
Related Items View

The “**Related Items**” view includes an embedded filter that will display the veteran’s VS-1 application if one exists.

Veteran Detail*	Relationships	Related Items				
Veteran - Alpha, Adam						
VS-1 Application						
	Case #	Status	Application Date	City	Applicant	Veteran
	10044	Saved	5/22/2020	Amherst 	Alpha, Adam 	Alpha, Adam











Working with Applicants

Click on the **Search All Persons** filter bar, click on **Create** and choose the **Applicant** class.



Basic Info

Note: The full name field will populate when saved.

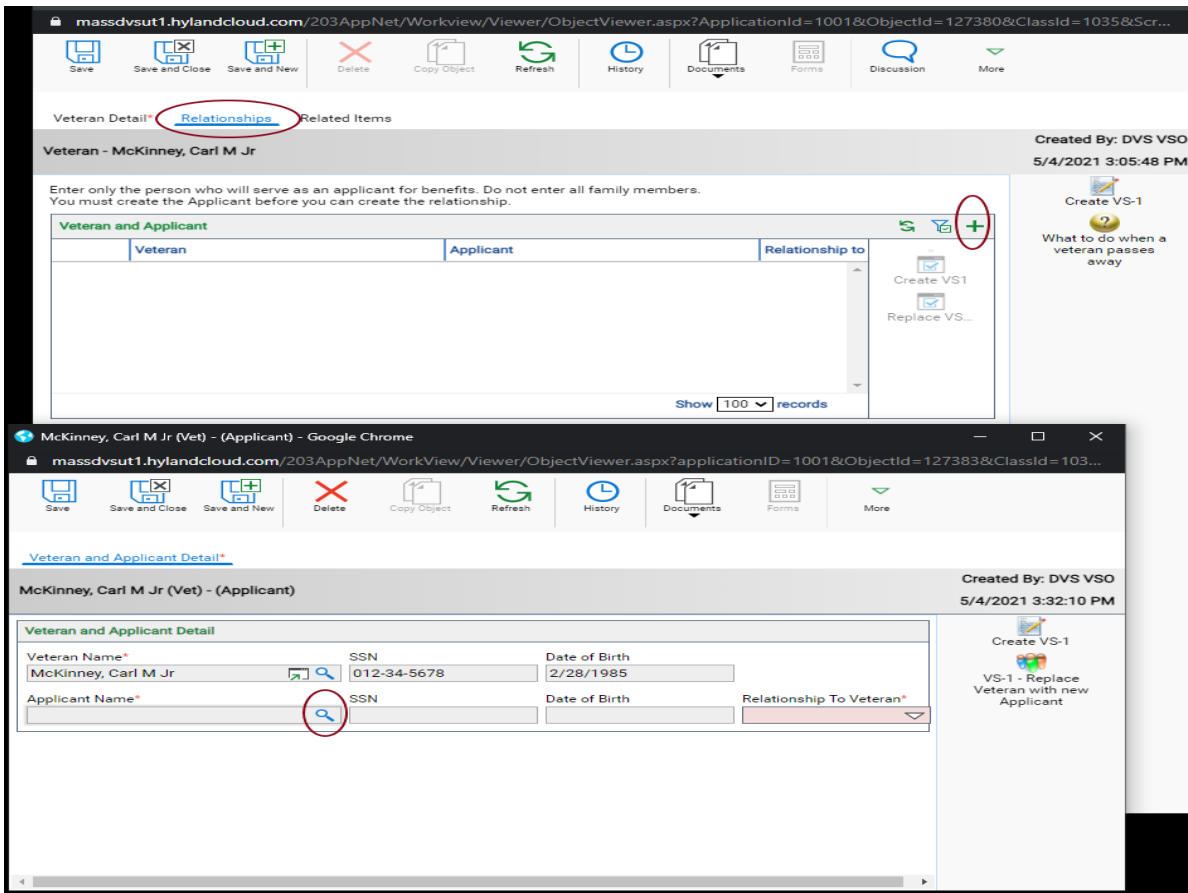
 Save	 Save and Close	 Save and New	 Delete	 Copy Object	 Refresh	 History	 Documents	 Forms	 More
Applicant Detail*			Relationships	Related Items					
Applicant - McKinney, JoAnn L								Created By: DVS VSC	
								5/4/2021 3:21:44 PM	
Basic Info									
Last Name*		First Name*		MI	Suffix				
McKinney		JoAnn		L					
Full Name				<input checked="" type="checkbox"/> Is Enabled					
McKinney, JoAnn L									
SSN*	Date of Birth	Date Deceased		<input type="checkbox"/> Director Override - this person is verified to be alive					
000-00-0078	5/6/1988								
Gender*	Spoken Language	US Citizen							
Female	English	Yes							
Ethnicity/Race: This information is collected to make sure everyone is treated fairly. Your answer is voluntary.									
Race (Check all that apply)					Special Circumstances (Check all that apply)				
<input type="checkbox"/> American Indian or Alaskan Native					<input type="checkbox"/> Physical/Mental Impairment				
<input type="checkbox"/> Asian					<input type="checkbox"/> Hearing Impaired				
<input type="checkbox"/> Black or African American					<input type="checkbox"/> Visually Impaired				
<input checked="" type="checkbox"/> Hispanic or Latino					<input type="checkbox"/> Interpreter Required				
<input type="checkbox"/> Native Hawaiian or other Pacific Islander					<input type="checkbox"/> Sign Language Required				
<input type="checkbox"/> White					Other				
Other									

Contact Info

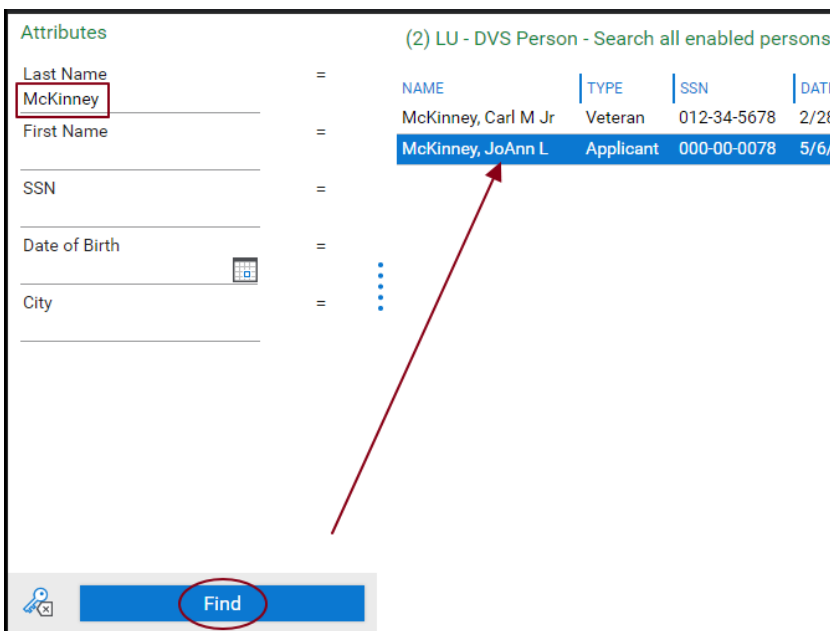
Contact Info			
Phone Number	Email Address		
(987)654-3210			
Street 1*			
65 Lambert Ave.			
Street 2			
Apt 1			
City*	State*	Zip Code	
Boston	MA	02119	

Pairing an Applicant to a Veteran

After the Veteran and Applicant have been created, open the Veteran, and click on the **Relationships** tab. Click on the **green + sign** to create a pairing. Click on the **magnifying glass** to search for the applicant.



In this example we will search for McKinney and click **Find** and then double click to select JoAnn.



Now select the relationship and click **Save and Close**.

Veteran and Applicant Detail*

McKinney, Carl M Jr (Vet) - (Applicant)

Veteran and Applicant Detail			
Veteran Name*	SSN	Date of Birth	
McKinney, Carl M Jr	012-34-5678	2/28/1985	
Applicant Name*	SSN	Date of Birth	Relationship To Veteran*
McKinney, JoAnn L	000-00-0078	5/6/1988	▼

- Applicant
 - Relation to Veteran - Applicant
 - Spouse**
 - Relation to Veteran - Spouse
 - Child
 - Relation to Veteran - Child
 - Parent
 - Relation to Veteran -

Now we see the pairing.

Veteran Detail* Relationships Related Items

Veteran - McKinney, Carl M Jr

Enter only the person who will serve as an applicant for benefits. Do not enter all family members. You must create the Applicant before you can create the relationship.

Veteran and Applicant			
Veteran	Applicant	Relationship to	
McKinney, Carl M Jr	McKinney, JoAnn L	Spouse	<input type="checkbox"/> Create VS1 <input type="checkbox"/> Replace VS...

1 - 1 of 1 records Show 100 records

VS-1 Applications

Create a VS-1

Open the Veteran record and click on **Create VS-1**.

Save Save and Close Save and New Delete Copy Object Refresh History Documents Forms Discussion More

Veteran Detail* Relationships Related Items

Veteran - McKinney, Carl M Jr Created By: DVS VSO 5/4/2021 3:05:48 PM

Basic Info

Last Name* First Name* MI Suffix
McKinney Carl M Jr

Full Name
McKinney, Carl M Jr Is Enabled

SSN Date of Birth Date Deceased Director Override - this person is verified to

Create VS-1
What to do when a veteran passes away

Demographics

Information carries over from the detail page. Please complete all other fields in this section.

Demographics* VS-21A Applications Recipients Employment* Shelter* Autos Obligations* Investments Insurance Documents

Case 1101 - Boston - 5/4/2021 - McKinney, Carl M Jr

Case Maintenance

Case # Status Application Date*
1101 Saved 5/4/2021

City* VSO
Boston DVS VSO

Refund Status	Refund Amount	Refund Balance
None	\$0.00	\$0.00

Applicant Info

Full Name
McKinney, Carl M Jr

Date of Birth SSN Relationship To Veteran
2/28/1985 012-34-5678 Applicant

Gender US Citizen Spoken Language
Male Yes English

Street 1
65 Lambert Ave.

Street 2
Apt 1

City State Zip Code
Boston MA 02119

Phone Number Email Address
(123)456-7890

Veteran Info

Full Name Date of Birth SSN
McKinney, Carl M Jr 2/28/1985 012-34-5678

Branch Of Service Service Start Date Service End Date
Air Force 12/14/2013 12/14/2017

Discharge Type
Honorable discharge

Basic Demographics

Race

- Hispanic or Latino
- American Indian or Alaskan Native
- Asian
- Black or African American
- Native Hawaiian or other Pacific Islander
- White
- Other

Special Circumstances

- Physical/Mental Impairment
- Hearing Impaired
- Visually Impaired
- Interpreter Required
- Sign Language Required
- Other

VS-21A Applications






VS-21As would be listed here in the red box. Once the VS-1 is correctly filled out, a green plus will be available to create a VS-21A. See Working with VS-21A Applications.

Demographics* VS-21A Applications Recipients Employment* Shelter* Autos Obligations* Investments Insurance Documents

Case 1101 - Boston - 5/4/2021 - McKinney, Carl M Jr

Lockout

Lockout VS-21A Missing Applicant

VS-21A Applications     

ID	VS-21A Date	Status	Benefit Start Date	Submitted Amount
[Red Box]				






Show 100 records

Recipients

Click on the **green + sign** to add a child.

Demographics* VS-21A Applications Recipients Employment* Shelter* Autos Obligations* Investments Insurance Documents

Case 1101 - Boston - 5/4/2021 - McKinney, Carl M Jr

Household Members Seeking Aid     

Last Name	First Name	Date Of Birth	Relationship To Applicant
McKinney	Carl	2/28/1985	Applicant

1 - 1 of 1 records

Show 100 records

Employment

Please complete all fields in this section.

Demographics* VS-21A Applications Recipients **Employment*** Shelter* Autos Obligations* Investments Insurance Documents

Case 1101 - Boston - 5/4/2021 - McKinney, Carl M Jr

Employment

Name of Last Employer* Length of Employment (Months)*
Cartsons, Inc. 42

Last Employer Address*
35442 Cartsons Lane
Boston, MA 02119

Occupation*
Foreman

Self Employed*
No If Yes, Prior Approval Required

Reason For Application*
Financial - Under Employed

Shelter

Please complete all fields in this section.

Demographics* VS-21A Applications Recipients Employment **Shelter*** Autos Obligations* Investments Insurance Documents

Case 1101 - Boston - 5/4/2021 - McKinney, Carl M Jr

Shelter

Real Estate owned by Applicant and/or Spouse

Applicant Owns A Home*
Yes

Date of Original Mortgage Original Mortgage Amount Current Mortgage Balance
09/24/2000 \$118,000.00 \$112,500.00

Multi-family Building Monthly Income from Property
No

Has a Second Mortgage Or Equity Line
No If yes, provide complete details on VS-21A

Has Sold Or Transferred Real Estate Within Past 36 Months If yes, dates
No

Do you pay any of the following:

Heat/AC separate from rent Electric or gas for cooking
Yes Yes

Telephone, including Cell Phone
Yes

Autos

Click on the **green + sign** to add automobiles.

Demographics* VS-21A Applications Recipients Employment* Shelter* **Autos** Obligations* Investments Insurance Documents

Case 1101 - Boston - 5/4/2021 - McKinney, Carl M Jr

Automobiles Owned or Leased by Applicant and/or Spouse. List all vehicles, even if not registered.

Automobiles					
Year	Make	Model	Registration Number	Registration	
2011	Chevy	Silverado	76JM4391	MA	
2018	Ford	Edge	72GV3926	MA	

1 - 2 of 2 records Show 100 records

Obligations

Please complete all fields in this section.

Demographics* VS-21A Applications Recipients Employment* Shelter* Autos **Obligations*** Investments Insurance Documents

Case 1101 - Boston - 5/4/2021 - McKinney, Carl M Jr

Obligations

Has Child Support Obligation*
No

Any Support Payment in Arrears*
No

In Receipt of Other Public Assistance*
No

Has Applicant received or is receiving C.115 benefits from any other community*
No

Is there an assignment or lien against this case*
No

Does Applicant's court record have any effect on this application*
No





Investments

In the three sections below, click on the **green + sign** in each section to add information.

Demographics* VS-21A Applications Recipients Employment* Shelter* Autos Obligations* **Investments** Insurance Documents

Case 1101 - Boston - 5/4/2021 - McKinney, Carl M Jr

List the details of all IRAs, Savings Bonds, Money Market Accounts, CDs, 401k accounts, or any other type of savings, investment or retirement account of any kind.

Investments    **+** 





Account Name	Account Number	Account Value
JPM	98392847723	\$1,450.00

1 - 1 of 1 records Show 100 records

Has Applicant transferred any Bonds, Bank Books, or any amount of Money; made an irrevocable beneficiary on any insurance or assigned any insurance; do you have a joint account with any other person; created any real property trusts, living wills, etc.?

If yes, prior approval from DVS is required. Describe fully on the VS-21A.





List all outstanding creditors and amounts owed, including personal loans.

Creditors    **+** 

Creditor Name	Amount Owed
Lowe's	\$1,305.00
Rhodes Dentistry	\$345.00
Robinson's Furniture	\$895.00

1 - 3 of 3 records Show 100 records

Give full details of all bank withdrawals in the past 12 months other than monthly living expenses.

Bank Withdrawals    **+** 

Account Name	Account Number	Amount	Withdrawal Date	Purpose
Community College	534768	\$250.00	4/17/2021	Tuition
Community College	534768	\$250.00	3/17/2021	Tuition
Community College	534768	\$250.00	2/17/2021	Tuition
Community College	534768	\$250.00	1/17/2021	Tuition

1 - 4 of 4 records Show 100 records

Insurance





Please complete all fields in this section. Click the **green + sign** to add Life Insurance.

Demographics* VS-21A Applications Recipients Employment* Shelter* Autos Obligations* Investments **Insurance** Documents

Case 1101 - Boston - 5/4/2021 - McKinney, Carl M Jr

Insurance

Has Life Insurance
Yes

Life Insurance    

Name Of Insured	Policy Amount	Monthly Premium	Policy Number
Carl McKinney	\$100,000.00	\$14.00	235MC-2345227

1 - 1 of 1 records Show 100 records

Does Applicant or Spouse have Medical Insurance
Yes

Company Name
Med 1

Insurance Type
PPO

Premium Amount
\$125.00

Medicare A Effective Date
No

Medicare B Effective Date
No

Prescription Drug Plan Plan Name Monthly Cost
Yes Prescription Plus \$35.00

Prescription Advantage
No

Low Income Subsidy
Yes

Documents

The documents in **Standard Required Documents** are required on each VS-1 application. Click on each of the green arrows to upload that document type.

The documents in **Conditionally Required Documents** may be required based on data you enter in the application. For example, if you indicate an applicant has a spouse in the **Recipients** list then the **Spouse Agreement to Reimburse**, **Authorization for Release of Information** and **Spouse DOR Letter** are both required.

Demographics* VS-21A Applications Recipients Employment* Shelter* Autos Obligations* Investments Insurance **Documents**

Case 1101 - Boston - 5/4/2021 - McKinney, Carl M Jr

Standard Required Documents

DD-214	Proof Of Residency
5/4/2021 - DVS - DD-214 for Case # 1101 - Veteran: CARL MCKINN ▾ ↑	5/4/2021 - DVS - DD-214 for Case # 1101 - Veteran: CARL MCKINN ▾ ↑
Income Verification	Authorization Release
5/4/2021 - DVS - DD-214 for Case # 1101 - Veteran: CARL MCKINN ▾ ↑	5/4/2021 - DVS - DD-214 for Case # 1101 - Veteran: CARL MCKINN ▾ ↑
Agreement To Reimburse	DOR Letter
5/4/2021 - DVS - DD-214 for Case # 1101 - Veteran: CARL MCKINN ▾ ↑	5/4/2021 - DVS - DD-214 for Case # 1101 - Veteran: CARL MCKINN ▾ ↑
Bank Statement 1	Bank Statement 2
5/4/2021 - DVS - DD-214 for Case # 1101 - Veteran: CARL MCKINN ▾ ↑	5/4/2021 - DVS - DD-214 for Case # 1101 - Veteran: CARL MCKINN ▾ ↑
Bank Statement 3	
5/4/2021 - DVS - DD-214 for Case # 1101 - Veteran: CARL MCKINN ▾ ↑	

Conditionally Required Documents

If you recently modified the VS-1 or added, modified, or deleted a recipient then click the **Save** button to refresh the list of conditionally required documents.

Spouse Agreement to Reimburse	Required
▾ ↑ <input type="checkbox"/>	
Spouse DOR Letter	Required
▾ ↑ <input type="checkbox"/>	
Employment Plan	Required
▾ ↑ <input type="checkbox"/>	
Spouse Employment Plan	Required
▾ ↑ <input type="checkbox"/>	
Medical Evaluation	Required
▾ ↑ <input type="checkbox"/>	
Marriage Certificate	Required
▾ ↑ <input type="checkbox"/>	

Initiate Refund

You can initiate a refund on a VS-1 application. If the current Refund Status is “None” then you can use the “**Initiate Refund (VSO)**” action and you will be prompted to enter a Refund Amount.

Case 1081 - Fairhaven - 3/31/2021 - Fish, Bradford J

Created By: JBETTENCOURT
3/31/2021 10:38:20 AM

Case Maintenance

Case # 1081 Status Saved Application Date* 3/31/2021

City* Fairhaven VSO DVS VSO

Refund Status	Refund Amount	Refund Balance
None	\$0.00	\$0.00

Applicant Info

Actions: Initiate Refund (VSO), Benefit History, Create Agreement to Reimburse Letter, Create Authorization for Release Letter

What to do when a Veteran Passes Away

Clicking on the task will open a window containing the instructions. If a window does not open, check your web browser for pop up blockers and disable.

Veteran Detail* Relationships Related Items

Veteran - McKinney, Carl M Jr

Created By: DVS VSC
5/4/2021 3:05:48 PM

Basic Info

Last Name* First Name* MI Suffix
McKinney Carl M Jr

Full Name
McKinney, Carl M Jr Is Enabled

SSN Date of Birth Date Deceased Director Override - this person is verified to

Actions: Create VS-1, What to do when a veteran passes away

WorkViewController.aspx - Google Chrome
massdvsut1.hylandcloud.com/203AppNet/Workview/WorkViewController.aspx

WorkViewController.aspx

1 / 1 | 100% +

Follow these steps when a veteran with a VS-1 application passes away:

- Update the veteran record with the date deceased.

If the veteran is survived by a family member who will take over the case follow these steps:

- Update the veteran record with the date deceased.
- If no Applicant record exists for the family member then create a new Applicant.
- If no record for the new applicant appears in the Relationships view of the veteran then create a new Relationship record.
- On the Relationship record between the veteran and the new applicant, execute the task "VS-1 - Replace Veteran with new Applicant".

To change over the Veteran to the Widow taking over the benefits

1. Search your VS-1's
2. Double click on the applicant

The screenshot shows the OnBase WorkView interface. On the left is a navigation pane with categories like 'Applications', 'FILTERS FOR DVS MIS', 'VETERANS AND APPLICANTS', 'PERIOD MANAGEMENT', 'SHARED LOOKUP DATA', 'FINANCIAL ASSISTANCE LOOKUP DATA', 'FINANCIAL ASSISTANCE CORE MAINTENANCE', 'STAFF', and 'CONFIGURATION ITEMS'. The 'Applications' section is expanded, showing a search for 'all VS-1 applications'. The main area displays a table with one row of results:

CASE #	STATUS	APP DATE	CITY	APPLICANT FULL NAME	VETERAN FULL NAME
1019	Saved	2/26/2021	Attleboro	Corrigan, James S	Corrigan, James S

Below the table is a 'Find' button. The top right shows the user 'Brown, Tracey' and a search bar.

3. The Demographics tab comes up.
4. Click on the box with the green arrow (blue arrow)

The screenshot shows the OnBase Object Viewer interface for Case 1019. The 'Demographics' tab is selected. The case details are as follows:

Case 1019 - Attleboro - 2/26/2021 - Corrigan, James S
Created By: EVANVSO
2/26/2021 10:16:39 AM

Case Maintenance

Case #	Status	Application Date*
1019	Saved	2/26/2021

City*: Attleboro VSO: evan VSO

Refund Status	Refund Amount	Refund Balance
None	\$0.00	\$0.00

Applicant Info

Full Name: Corrigan, James S

Date of Birth: 11/2/1969 SSN: 035-48-4255 Relationship: Applicant

Gender: Male US Citizen: Yes Spoken Language: English

Street 1: 100 Fisher Street #2

Street 2:

City: Attleboro State: MA Zip Code: 02703

Phone Number: (401)390-6091 Email Address: jamescorrigan1969@gmail.com

Veteran Info

On the right side, there are buttons for 'Initiate Refund (VSO)', 'Initiate Refund', and 'Benefit History'. A blue arrow points to a small green box next to the 'Full Name' field.

5. That will bring you to the Veteran Detail tab.
6. Click on the Relationships tab

Veteran - Corrigan, James S Created By: TBROWN150
2/23/2021 2:19:24 PM

Basic Info

Last Name* [Corrigan] First Name* [James] MI [S] Suffix []

Full Name [Corrigan, James S] Is Enabled

SSN [035-48-4255] Date of Birth [11/2/1969] Date Deceased [] Director Override - this person is verified to be alive

Gender* [Male] Spoken Language [English] US Citizen* [Yes]

Ethnicity/Race: This information is collected to make sure everyone is treated fairly. Your answer is voluntary.

Race (Check all that apply)

- American Indian or Alaskan Native
- Asian
- Black or African American
- Hispanic or Latino
- Native Hawaiian or other Pacific Islander
- White
- Other []

Special Circumstances (Check all that apply)

- Physical/Mental Impairment
- Hearing Impaired
- Visually Impaired
- Interpreter Required
- Sign Language Required
- Other []

Service Info

Branch Of Service* [Army] Service Start Date [9/8/2006] Service End Date [5/24/2009]

7. Double click on the Veteran and Applicant

Veteran - Corrigan, James S Created By: TBROWN150
2/23/2021 2:19:24 PM

Enter only the person who will serve as an applicant for benefits. Do not enter all family members. You must create the Applicant before you can create the relationship.

Veteran	Applicant	Relationship to Veteran
Corrigan, James S	Corrigan, Nancy	Widow

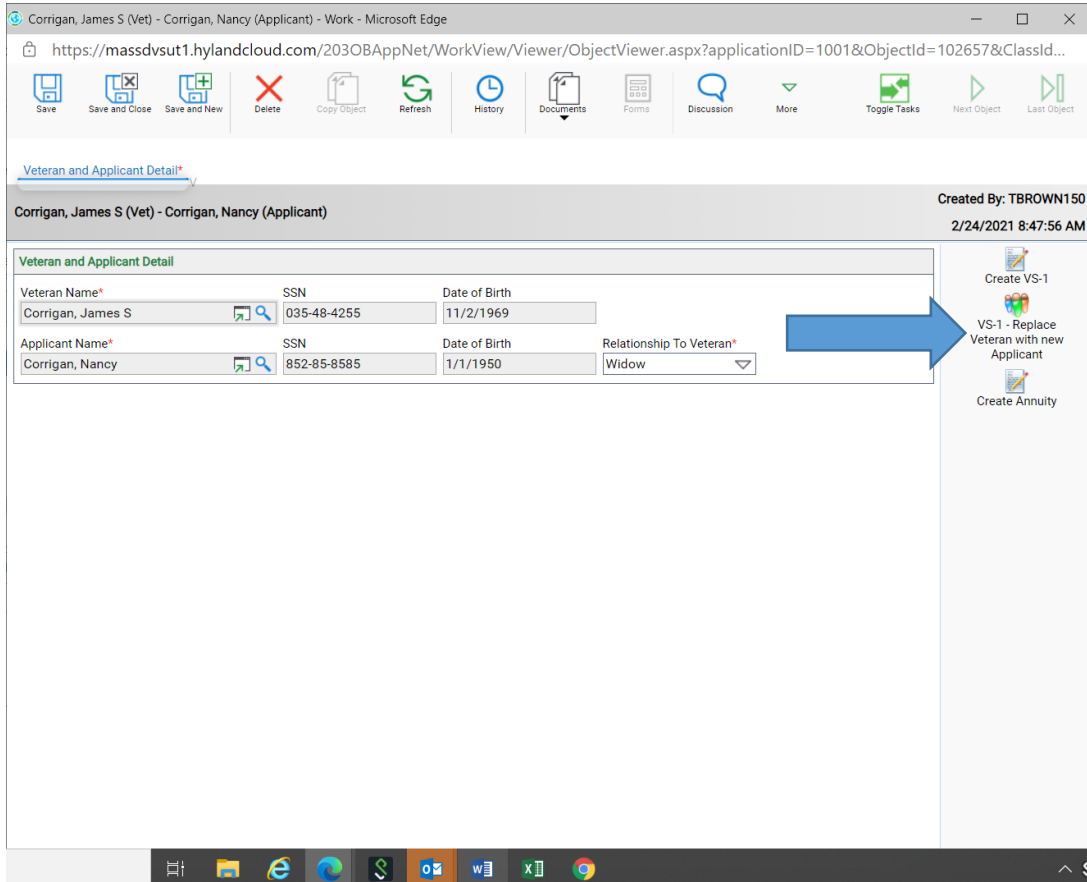
1 - 1 of 1 records Show 100 records

Relationships where one Veteran is claiming benefits of another veteran

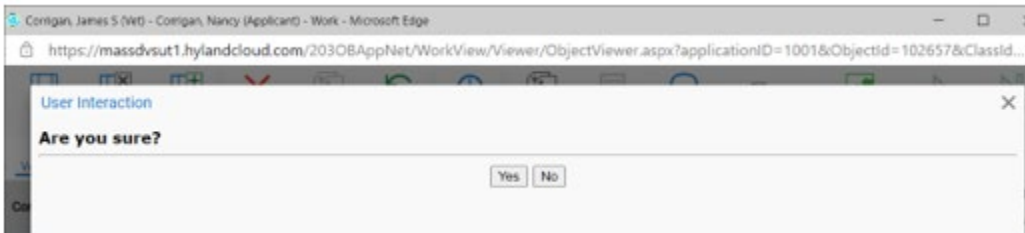
Veteran	Applicant	Relationship to Veteran
---------	-----------	-------------------------

Show 100 records

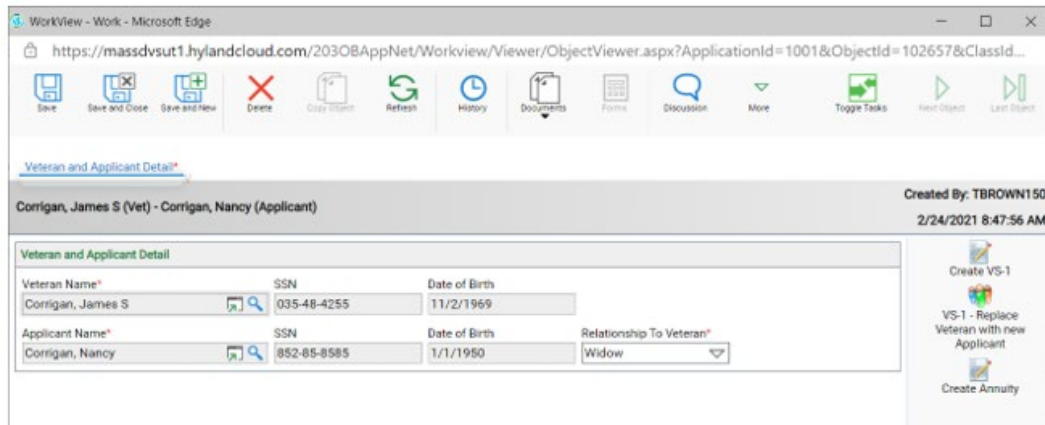
8. That will bring you to the Veteran and Applicant Detail
9. On the right-hand side, you will see the VS-1 – Replace Veteran with new applicant (blue arrow)



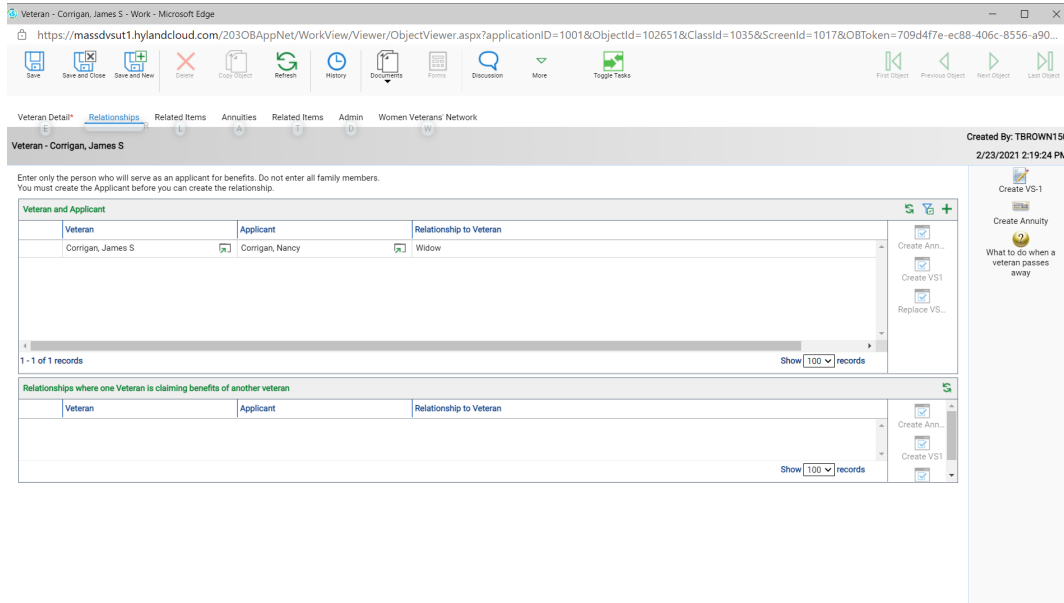
10. You will receive a message "Are you sure?", click yes



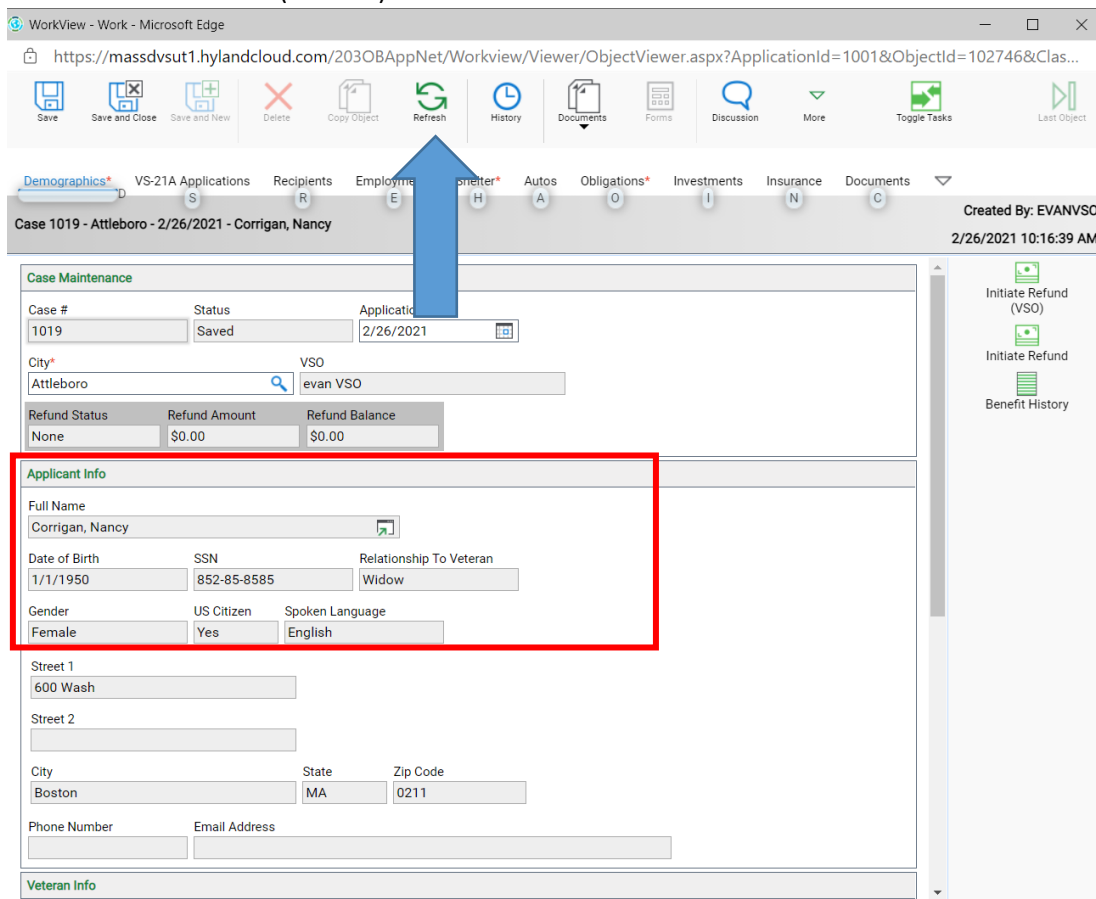
11. Click save and close



12. Click save and close again.



13. Click the refresh button (blue arrow) and you will see the new applicant is now the widow and relationship to Veteran is now widow (red box)

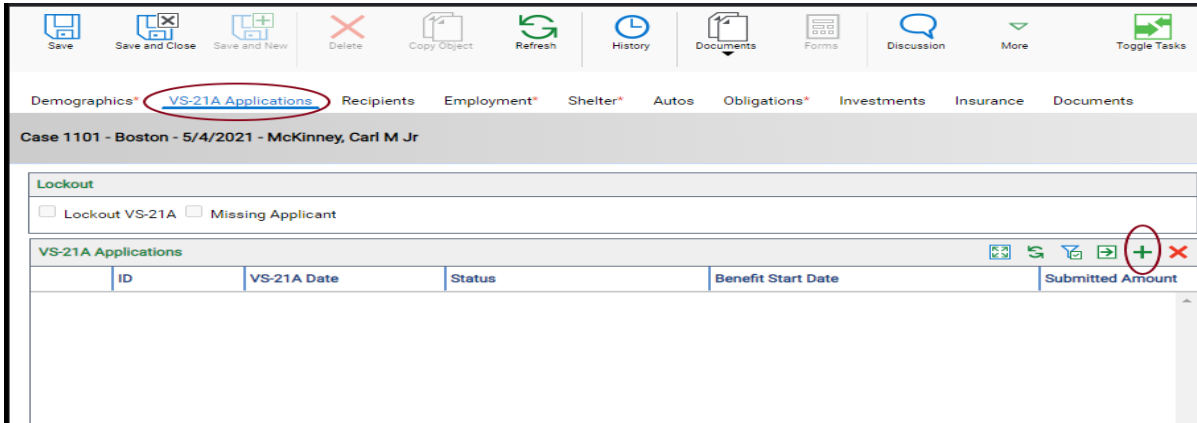


Now update all the tabs to the widow/er.

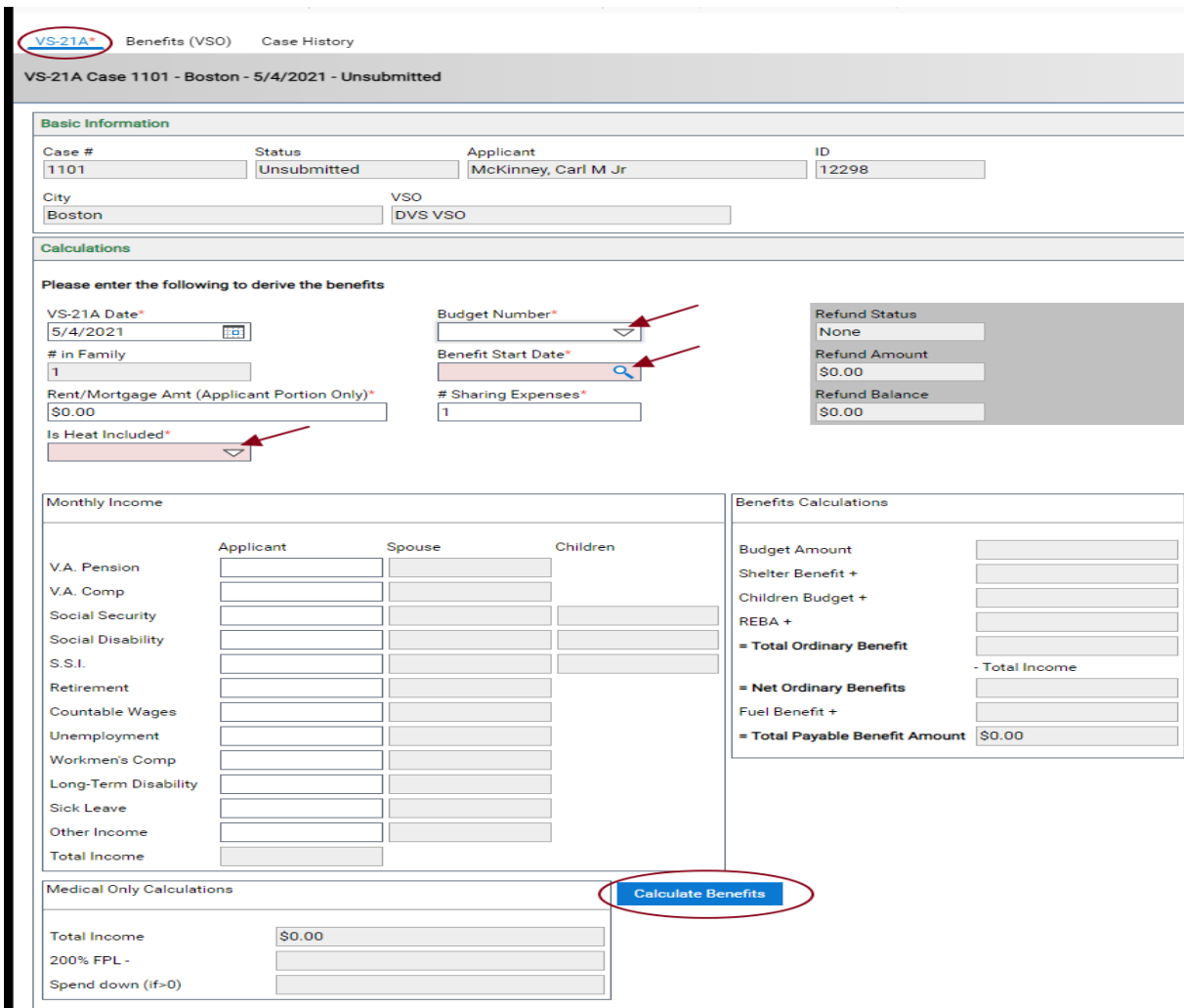
Working with the VS-21A Applications

Creating the VS-21A

On the VS-1, click on the VS-21A Applications tab and click the **green + sign** to create.



On the main VS-21A tab enter Budget Number, Benefit Start Date, answer the Is Heat Included field and then click on **Calculate Benefits**.



After clicking on **Calculate Benefits** we can see the totals.

[VS-21A*](#) Benefits (VSO) Case History

VS-21A Case 1101 - Boston - 5/4/2021 - Unsubmitted

Basic Information

Case #	Status	Applicant	ID
1101	Unsubmitted	McKinney, Carl M Jr	12298
City	VSO		
Boston	DVS VSO		

Calculations

Please enter the following to derive the benefits

VS-21A Date*	Budget Number*	Refund Status
5/4/2021	1 - Single	None
# in Family	Benefit Start Date*	Refund Amount
1	4/1/2021	\$0.00
Rent/Mortgage Amt (Applicant Portion Only)*	# Sharing Expenses*	Refund Balance
\$0.00	1	\$0.00
Is Heat Included*		
No		

Monthly Income	Benefits Calculations		
	Applicant	Spouse	Children
V.A. Pension			
V.A. Comp			
Social Security			
Social Disability			
S.S.I.			
Retirement			
Countable Wages			
Unemployment			
Workmen's Comp			
Long-Term Disability			
Sick Leave			
Other Income			
Total Income	\$0.00		

Budget Amount	\$747.00
Shelter Benefit +	\$0.00
Children Budget +	\$0.00
REBA +	\$0.00
= Total Ordinary Benefit	\$747.00
	- Total Income
= Net Ordinary Benefits	\$747.00
Fuel Benefit +	\$302.00
= Total Payable Benefit Amount	\$1,049.00

Medical Only Calculations Calculate Benefits

Total Income	\$0.00
200% FPL -	\$2,126.00
Spend down (if>0)	\$0.00

Creating a VS-21A Application

VS-21A applications are created from VS-1 applications. The VS-1 must include a recipient where the Relationship to Applicant is "Applicant" and the VS-1 must not have VS-21A lockout applied. Navigate to the "VS-21A Applications" view of the VS-1 and click the **green + sign "Create Object"** button to create a new VS-21A.

Object ID	ID	VS-21A Date	Status	Benefit Start Date	Submit
2162	50010	5/6/2020	Denied	4/1/2020	

At the time of creation, the VS-21A will have the "# in Family" set based on the recipients on the VS-1.

Entering Benefits

On the Benefits (VSO) tab, click on the **green + sign** to create a benefit row. Be sure to select the Month and then enter values. In this example we entered \$275.00 for Doctor then clicked Save and Close. Double-click a benefit row to open the benefit detail view. Once submitted, you will no longer be able to edit the amounts.

Month	OB	Fuel	Doctor	Medical	Hospital	Dental
4/1/2021	\$0.00	\$0.00	\$275.00	\$0.00	\$0.00	\$0.00

VS-21A* [Benefits \(VSO\)](#) Case History

VS-21A Case 1101 - Boston - 5/4/2021 - Unsubmitted

Benefit Summary

Net Ordinary Benefit Amount	Fuel Benefit Amount	Total Payable Benefit Amount
\$747.00	\$302.00	\$1,049.00

Prior Approval Spend Down (if > \$0)

\$0.00

VSO Benefits

Month	OB	Fuel	Doctor	Medical	Hospital	Dental
4/1/2021	\$0.00	\$0.00	\$275.00	\$0.00	\$0.00	

Submitting VS-21As for Approval

After you have entered benefit amounts, submit the VS-21A to the authorizer by clicking the **Send to Authorizer** button in the side **Tasks** panel.

VS-21A* [Benefits \(VSO\)](#) Case History

VS-21A Case 1101 - Boston - 5/4/2021 - Unsubmitted

Created By: DVS VSC
5/4/2021 6:04:36 PM

Basic Information

Case #	Status	Applicant	ID
1101	Unsubmitted	McKinney, Carl M Jr	12298

City: Boston VSO: DVS VSO

Calculations

Amend Open Benefits

→
Send to Authorizer

Notice of Determination

Click Toggle Tasks to turn panel on/off.

VS-21A* [Benefits \(VSO\)](#) Case History

Save
Save and Close
Save and New
Deletes
Copy Object
Refresh
History
Documents
Forms
Discussion
More
Toggle Tasks
Last Object

Completing the VS-21A

Once the VS-21A has been approved, you can generate your letters and then click on **Complete** to mark this VS-21A as **Complete**.

VS-21A* Benefits (VSO) Case History

VS-21A Case 1101 - Boston - 5/4/2021 - Approved Created By: DVS VSO
5/4/2021 6:04:36 PM

Basic Information			
Case #	Status	Applicant	ID
1101	Approved	McKinney, Carl M Jr	12298
City	VSO		
Boston	DVS VSO		

Calculations

Please enter the following to derive the benefits

Notice of Determination

Notice of Intent Letter

Notice of Action

Completed

Escalating VS-21As

If an application was denied, you will now see a task to **Escalate**. Escalation goes from Authorizer to Chief to Director.

If an Authorizer denied the application, it will be escalated to the Chief.

If a Chief denied the application, it will be escalated to the Director.

VS-21A* Benefits (VSO) Case History

VS-21A Case 1101 - Boston - 5/4/2021 - Denied Created By: DVS VSO
5/4/2021 6:35:02 PM

Basic Information			
Case #	Status	Applicant	ID
1101	Denied	McKinney, Carl M Jr	12300
City	VSO		
Boston	DVS VSO		

Calculations

Please enter the following to derive the benefits

VS-21A Date*	Budget Number*	Refund Status
5/4/2021	1 - Single	None

Escalate

Notice of Determination

Notice of Intent Letter

Notice of Action

Completed

Amending Open Benefits

1. Go to the VS-21A Applications.

Case 1075 - Boston - 3/23/2021 - Moo, Mark

Created By: TBROWN150
3/23/2021 9:08:37 AM

Case Maintenance

Case # 1075 Application Date* 3/23/2021

City* Boston VSO Brown, Tracey

Refund Status Settlement Refund Amount \$200.00

Applicant Info

Full Name Moo, Mark

Date of Birth 1/1/1950 SSN 880-00-0000 Relationship To Veteran Applicant

Gender Male US Citizen Yes Spoken Language

Street 1 600 wash st

Street 2

City Boston State MA Zip Code 02111

Phone Number Email Address

Veteran Info

2. All the VS-21A's will come up.

3. Click on the green +.

Case 1075 - Boston - 3/23/2021 - Moo, Mark

Created By: TBROWN150
3/23/2021 9:08:37 AM

VS-21A Applications

ID	VS-21A Date	Status	Benefit Start Date	Submitted Amount	Authorized Amount	Is Amended
12262	4/7/2021	Submitted	5/1/2021	\$500.00	\$500.00	<input type="checkbox"/>
12261	4/7/2021	Approved	5/1/2021	\$50.00	\$50.00	<input type="checkbox"/>
12260	4/7/2021	Submitted	5/1/2021	\$150.00	\$150.00	<input type="checkbox"/>
12259	4/7/2021	Approved	4/1/2021	\$200.00	\$200.00	<input type="checkbox"/>
12258	4/7/2021	Submitted	4/1/2021	\$50.00	\$50.00	<input checked="" type="checkbox"/>
12257	4/7/2021	Submitted	4/1/2021	\$150.00	\$150.00	<input checked="" type="checkbox"/>
12248	3/24/2021	Approved	4/1/2021	\$0.00	\$0.00	<input type="checkbox"/>
12247	3/24/2021	Approved	4/1/2021	\$650.00	\$650.00	<input checked="" type="checkbox"/>
12243	3/23/2021	Approved	3/1/2021	\$4,385.00	\$4,385.00	<input checked="" type="checkbox"/>
12242	3/23/2021	Approved	3/1/2021	\$4,385.00	\$4,385.00	<input checked="" type="checkbox"/>

1 - 15 of 15 records Show 100 records

4. Enter the Benefit Start Date on the month you would like to amend.
5. If anything has changed in their income, rent, sharing or heat. Make sure you re-calculate the benefits.

VS-21A Case 1075 - Boston - 4/8/2021 - Unsubmitted - Work - Microsoft Edge

https://massdvsut1.hylandcloud.com/2030BAppNet/WorkView/Viewer/ObjectViewer.aspx?applicationID=1001&ObjectID=105465&ClassID=1018&ScreenID=1022&OBToken=4e5c...

VS-21A* Benefits (Authorizer) Benefits (VSO) Authorizer Comments Case History Admin (Director and Chief) Repayments

VS-21A Case 1075 - Boston - 4/8/2021 - Unsubmitted Created By: TBROWN 4/8/2021 11:21:38 AM

Basic Information

Case #	Status	Applicant	ID
1075	Unsubmitted	IMoo, Mark	12264
City	VSO		
Boston	Brown, Tracey		

Calculations

Please enter the following to derive the benefits

VS-21A Date* 4/8/2021

in Family 1

Rent/Mortgage Amt (Applicant Portion Only)* \$950.00

Is Heat Included* No

Budget Number* 1 - Single

Benefit Start Date*

Sharing Cases* 1

Refund Status

Settlement	
Refund Amount	\$200.00
Refund Balance	\$200.00

Monthly Income

	Applicant	Spouse	Children
V.A. Pension	\$145.00		
V.A. Comp			
Social Security	\$850.00		

Benefits Calculations

Budget Amount	
Shelter Benefit +	
Children Budget +	

6. Click on the Benefits (VSO) tab (blue arrow), then click Amend Open Benefits (yellow arrow).

VS-21A Case 1075 - Boston - 4/8/2021 - Unsubmitted - Work - Microsoft Edge

https://massdvsut1.hylandcloud.com/2030BAppNet/WorkView/Viewer/ObjectViewer.aspx?applicationID=1001&ObjectID=105465&ClassID=1018&ScreenID=1022&OBToken=4e5c...

VS-21A* Benefits (Authorizer) **Benefits (VSO)** Authorizer Comments Case History Admin (Director and Chief) Repayments

VS-21A Case 1075 - Boston - 4/8/2021 - Unsubmitted Created By: TBROWN 4/8/2021 11:21:38 AM

Benefit Summary

Net Ordinary Benefit Amount	Fuel Benefit Amount	Total Payable Benefit Amount
		\$0.00
<input type="checkbox"/> Prior Approval	Spend Down (if > \$0)	

VSO Benefits

Month	OB	Fuel	Doctor	Medical	Hospital	Dental	Misc	Description

Show 100 records

Repeat Benefit Row # Times

VSO Comment

7. This is where you can amend all the benefits from the benefit start date you have chosen forward.
8. Click in the row to want to change the amount.

VS-21A* Benefits (Authorizer) **Benefits (VSO)** Authorizer Comments Case History Admin (Director and Chief) Repayments

VS-21A Case 1065 - Ashby - 4/8/2021 - Unsubmitted Created By: TBROWN
4/8/2021 11:30:52 AM

Benefit Summary

Net Ordinary Benefit Amount: \$501.00 + Fuel Benefit Amount: \$0.00 = Total Payable Benefit Amount: \$501.00

Prior Approval Spend Down (if > \$0): \$0.00

Month	OB	Fuel	Doctor	Medical	Hospital	Dental	Misc	Description
2/1/2021	\$501.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	
2/1/2021	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$250.00	Eye Glasses
3/1/2021	\$501.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	
4/1/2021	\$501.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	
5/1/2021	\$501.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	
6/1/2021	\$501.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	

1 - 6 of 6 records Show 100 records

Repeat Benefit Row # Times

VSO Comment

9. Change the amount then click on Save and Close now that line has been updated.

VS-21A Benefit **VSO Benefit**

VS-21A Case # 1065 VS-21A Status Unsubmitted Applicant Pop, Peter

VSO Benefit

Month: 2/1/2021

OB: \$501.00 Fuel: \$0.00 Doctor: \$0.00 Medical: \$0.00 Hospital: \$0.00 Dental: \$0.00 Misc: \$0.00

Description: Delete

10. You can also change an amount from using the pencil.

The screenshot shows the 'Benefits (VSO)' page in Microsoft Edge. The 'Benefit Summary' section displays:
Net Ordinary Benefit Amount: \$501.00
Fuel Benefit Amount: \$0.00
Total Payable Benefit Amount: \$501.00
Spend Down (if > \$0): \$0.00
A table titled 'VSO Benefits' contains the following data:

Month	OB	Fuel	Doctor	Medical	Hospital	Dental	Misc	Description
2/1/2021	<input type="checkbox"/>	\$501.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
2/1/2021	<input type="checkbox"/>	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$250.00	Eye Glasses
3/1/2021	<input type="checkbox"/>	\$501.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
4/1/2021	<input type="checkbox"/>	\$501.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
5/1/2021	<input type="checkbox"/>	\$501.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
6/1/2021	<input type="checkbox"/>	\$501.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00

A blue arrow points to the pencil icon in the table's toolbar. The right sidebar contains actions: Amend Open Benefits, Send to Authorizer, Notice of Determination, Notice of Intent Letter, and Notice of Action.

11. Once the pencil is clicked on, you can click in any box you want to change (yellow arrow) AND you can add a row as well (blue arrow)

12. Once all changes are done send to Authorizer (red arrow)

This screenshot is identical to the previous one but includes annotations:
- A yellow arrow points to the 'OB' cell in the first row of the 'VSO Benefits' table.
- A blue arrow points to the 'Add new row' button below the table.
- A red arrow points to the 'Send to Authorizer' button in the right sidebar.

Working with Periods

The system automatically creates twelve periods for each fiscal year. As a VSO you have access to view the current period and past open periods for each city where you are the primary VSO.

Close a Period

Click on the My Past Open Periods (VSO) filter under the PERIOD MANAGEMENT filter bar. In this example we have five open periods listed.

The screenshot shows the OnBase WorkView interface. On the left is a sidebar with a search bar and several filter categories: Applications (DVS MIS), FILTERS FOR DVS MIS, FINANCIAL ASSISTANCE CASES, VETERANS AND APPLICANTS, and PERIOD MANAGEMENT. Under PERIOD MANAGEMENT, 'My Past Open Periods (VSO)' is selected and circled in red. The main content area displays '(5) My Past Open Periods (VSO)' with a table of open periods.

PERIOD	CITY
January 2021	Fairhaven
February 2021	Fairhaven
February 2021	Plainfield
March 2021	Fairhaven
March 2021	Plainfield

Double click to open a Period. Notice the area that lists VS-21A's requiring your review and the area that lists the open periods. Click on Close Period to close.

The screenshot shows the OnBase Period Management interface for 'Period X City - January 2021 - Fairhaven'. The top right corner indicates 'Created By: KMBS-DLESPER' and the date '9/2/2020 4:02:52 PM'. The interface includes fields for Period Name, Start Date, Quarter, and Fiscal Year, and City, VSO, and Treasurer. There are checkboxes for 'Is Closed', 'Is Certified', and 'VSO 50%', along with fields for Closure Date, Closed By, VSS/6 Report, Certification Date, and Certified By. Two tables are visible: 'VS21A's requiring VSO Review' and 'Open periods for thi...'. The 'Close Period' button is circled in red. Red arrows point to the 'VS21A's requiring VSO Review' and 'Open periods for thi...' tables.

Case #	Applicant Name	VS-21A Date
--------	----------------	-------------

Period Name
January 2021
February 2021
March 2021

Once closed you will see that the close fields have been populated, the VS 5/6 report has been generated, the task to close the period is no longer available and the Open Periods area has been updated.

To view the report, double click on the report name.

Period X City - January 2021 - Fairhaven

Created By: KMBS-DLESPEF
9/2/2020 4:02:52 PM

Period

Period Name	Start Date	Quarter	Fiscal Year
January 2021	1/1/2021	Q3	FY2021

City

City	VSO	Treasurer
Fairhaven	DVS VSO	Treasurer

Is Closed Closure Date: 4/28/2021 Closed By: DVS VSO VS5/6 Report: **DVS - VS5/6 for JANUARY 2021 - FAIRHAVEN**

Is Certified Certification Date: Certified By: VS7 Report:

VSO 50%

VS21A's requiring VSO Review

Case #	Applicant Name	VS-21A Date
--------	----------------	-------------

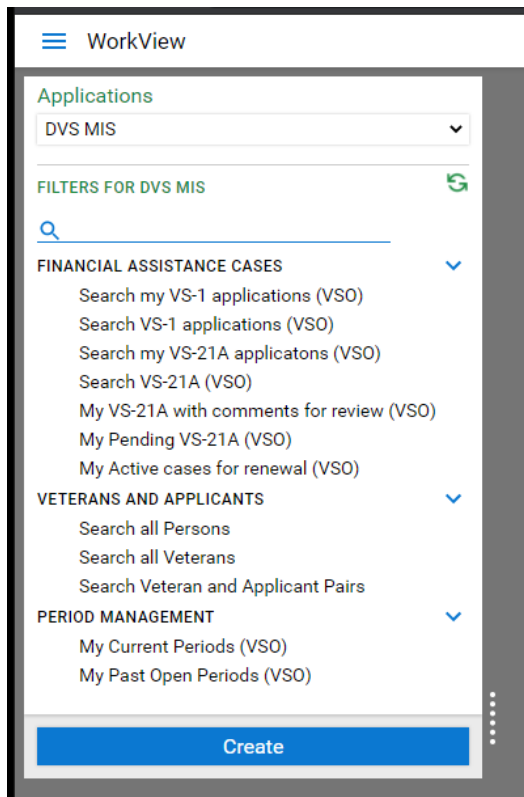
Open periods for thi...

Period Name
February 2021
March 2021

If the report doesn't open check the pop-up blocker settings on your web browser. From here you can download or print the report.

Filter Bars and Filters

Filters are what you use to search for and find the data you are looking for; they present you a list of data in rows and columns. Related filters are grouped in Filter Bars that you can collapse and expand as needed to find the filter you are looking for.



Financial Assistance Cases Filter Bar

FINANCIAL ASSISTANCE CASES



The “Financial Assistance Cases” filter bar contains all the filters you will need to work with VS-1 and VS-21A applications. The “Financial Assistance Cases” filter bar offers several filters:

- “Search my VS-1 applications (VSO)” allows you to search all VS-1 applications assigned to you.
- “Search VS-1 applications (VSO)” allows you to search all VS-1 applications associated with cities you have access to.
- “Search my VS-21A applications (VSO)” allows you to search all VS-21A applications assigned to you.
- “Search VS-21A (VSO)” allows you to search all VS-21A applications associated with cities you have access to.
- “My VS-21A with comments for review (VSO)” lists all the VS-21A applications that require you to review comments from authorizers.
- “My Pending VS-21A (VSO)” lists all VS-21A applications assigned to you that have been marked as pending due to missing information or documents.
- “My Active cases for renewal (VSO)” is a list of VS-1 applications associated with your city that have a VS-21A benefit within the last six months.

Veterans and Applicants Filter Bar

VETERANS AND APPLICANTS



The “Veterans and Applicants” filter bar contains all the filters you will need to work with veterans and applicants. The “Veterans and Applicants” filter bar offers several filters:

- “Search all Persons” searches all persons and may return both veterans and applicants.
- “Search all Veterans” limits results to only veterans.
- “Search Veteran and Applicant Pairs” returns the veteran and applicant relationship.

Period Management Filter Bar

PERIOD MANAGEMENT




The “Period Management” filter bar exposes periods for cities where you are the primary VSO:

- “My Current Periods (VSO)” lists the current period for each city where you are the primary VSO.
- “My Past Open Periods (VSO)” lists the open periods for each city where you are the primary VSO.

Attribute Constraints

Attributes

Last Name	=
First Name	=
SSN	=
Date of Birth 	=
City	=

Filter attribute constraints allow you to enter criteria to narrow your search.

Wildcard

You can use "*" as a wildcard character.

Here you can see a search for "buck*" was performed and the results were limited to only those veterans whose last name begins with "buck". Notice the search is not case-sensitive.

Attributes		(4) Search all Veterans	
Last Name	=	NAME	DATE OF BI
buck*		Buck, Kenneth T.	
First Name	=	Buckey, Lucky	3/10/1981
SSN	=	Buckland, Betty	1/1/1970
Date of Birth	=	Buckley, Edward M.	
City	=		

Here you can see we have further narrowed our search with "buckl*".

Attributes		(2) Search all Veterans	
Last Name	=	NAME	DATE C
buckl*		Buckland, Betty	1/1/1
First Name	=	Buckley, Edward M.	
SSN	=		
Date of Birth	=		
City	=		

And here we have narrowed results using a combination of last name and first name.

Attributes		(1) Search all Veterans	
Last Name	=	NAME	DATE
buckl*		Buckley, Edward M.	
First Name	=		
e*			
SSN	=		
Date of Birth	=		
City	=		

Here you can see * was used in the middle and end of the search criteria, results are those beginning with “b” and containing “ck” somewhere after “b”.

Attributes		(5) Search all Veterans	
Last Name	=	NAME	DATE OF
b*ck*		Blocker, Kenneth C	2/11/
First Name	=	Buck, Kenneth T.	
SSN	=	Buckey, Lucky	3/10/
Date of Birth	=	Buckland, Betty	1/1/1
City	=	Buckley, Edward M.	

The * can be used anywhere within the search criteria, beginning, middle, and end.

Dates

Dates can be searched with multiple operators, click the symbol to cycle through the options:

Date of Birth	=	>
City	=	

You can search dates with a date range by clicking in the input box and pressing F6 or clicking on the attribute name (“Date of Birth” in this case) which will present a new criteria input box for the same attribute. In the example below, F6 was pressed and the operator was changed to greater than to and less than allowing us to search for all veterans born between January and September 1971.

Attributes		(3) Search all Veterans		
Last Name	=	NAME	DATE OF BIRTH	CITY
First Name	=	Neumyer, Kenneth S	1/29/1971	Bostc
SSN	=	Nye, Pamela E	7/29/1971	Salen
	=	Rowell, Michael P	8/10/1971	Bedfc
Date of Birth	>			
01/01/1971	AND			
Date of Birth	<			
09/30/1971				
City	=			

WorkView Basics

When viewing filter results, double-click to open the item.

Attributes		(863) Search all Veterans		
Last Name	=	NAME	DATE OF BIRTH	CITY
		Cook, Thomas A	4/8/1955	Falmout
First Name	=	Cooper, Carl L	2/21/1958	Boston
SSN	=	Coose, Matthew W	5/8/1995	Boston
Date of Birth	=	Copeland, Leonard A	10/28/1965	Shrewsb
		Corn, Joshua C	11/30/1979	Quincy
City	=	Corrigan, James S	11/2/1969	Attleboro
		Corchia, Ronald		

After double-clicking the second row (Cooper, Carl L) in the above image:

Save Save and Close Save and New Delete Copy Object Refresh History

[Veteran Detail](#) Relationships Related Items

Veteran - Cooper, Carl L

Basic Info (this information was imported from another system)

Last Name	First Name	MI	Suffix
Cooper	Carl	L	

Full Name Is Enabled

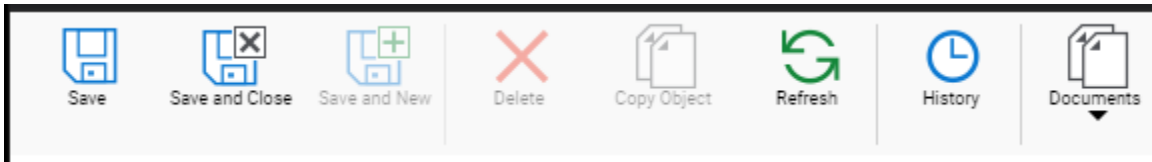
Cooper, Carl L

SSN	Date of Birth	Date Deceased
340-23-6137	2/21/1958	

Gender	Spoken Language	US Citizen
Male	English	Yes

Ethnicity/Race: This information is collected to make sure everyone is treated fairly. Your s

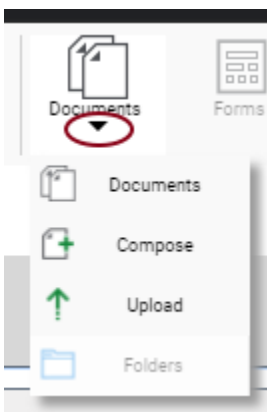
When viewing any individual item, you may have some options available to you. Depending on your permission, some of these buttons may be disabled.



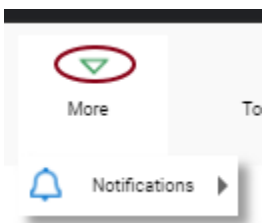
- Save – save the item you are viewing.
- Save and Close – save the current item and close the window.
- Save and New – save the current item and create a new item of the same type.
- Delete – delete the current item.
- Copy Object – create a new item by copying the current item.
- Refresh – reload the current item.



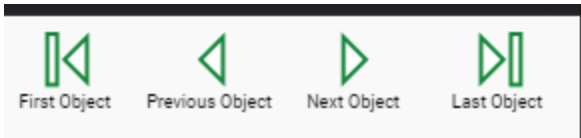
- History – view the history of this item including attribute value changes.



- Documents – view documents related to the current item.
- Import – import a new document to the current item.
- Compose – generate a new form letter based on the current item.



- More-> Notifications – receive notifications each time this item is updated.



- Navigation – If there was more than one item in the filter you opened this item from, you can use these buttons to navigate through the list of items.

Attribute indicators

An asterisk at the end of the attribute name indicates this attribute is required before you can save the current item.

First Name*

William

A downward pointing arrow indicates a drop-down list of values is available.

Gender*

Male ▾


Male

Female

Unspecified


Click the calendar icon in date fields to display a calendar. For date attributes you may enter a date manually or use the calendar.

Service End Date*

12/31/2005 

Dec 2005

Su	Mo	Tu	We	Th	Fr	Sa
27	28	29	30	1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31





The magnifying glass icon  indicates a list of choices is available, click the icon to display the choices.

City

Marshfield 

Embedded filters

Some items may have a list of other related items. In this screenshot, you can see multiple rows in “History Notes”. The control box “History Notes” is an embedded filter. The embedded filter allows you to create an unlimited number of items related to the current item.

History Notes    			
	Created Date	Created By	Note
	8/12/2020 4:05:11 PM	KMBS-BILLANN	Note 2
	8/12/2020 4:05:03 PM	KMBS-BILLANN	Note 1



Refresh – click this to refresh the list.



Create Object – click this to create a new item in the list.



Delete – click this after selecting one or more rows in the filter to delete the selected items.




Toggle filter – allows you to dynamically limit the results of the embedded filter.

You can double-click an item in the list to open in a new window, just like when you double-click an item in a main filter.

Formatted Text

Some text attributes may allow you to apply special formatting to the text as seen here:

History Note

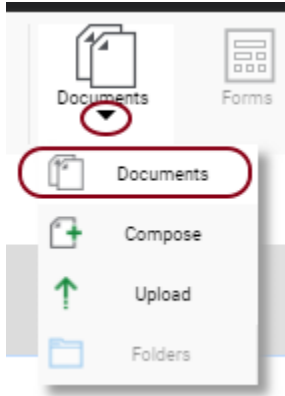


Text in this box can be marked up with **BOLD**, *italic*, font color, etc.

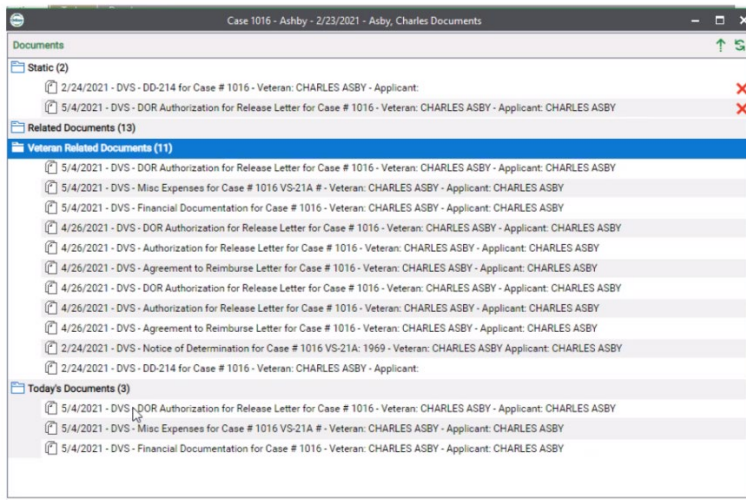
Documents

Viewing Documents

Click the “Documents” down arrow and choose Documents to show documents related to the current item you are viewing.



The Documents window will display documents related to the current item you are viewing. All WorkView items have a Static folder that will automatically contain all documents that have been manually imported to the item.



Static folder

This folder is native to OnBase and cannot be deleted or renamed. All documents imported to a specific workview object (ie. Veteran, Annuity, VS21-A) will appear here. If you delete a document from this folder it will remove it from the folder but not OnBase. Depending on what type of item you are viewing, there may be other custom folders.

Related Documents folder

The context of a Related Documents folder is different depending upon what you are viewing (i.e. a Person, VS21-A, Annuity, etc.). Documents in this folder are related by its keyword (identifier). For example:

- Person documents are related by an SSN
- VS-1 is related by a Case Number
- Annuity documents are related by an Annuity ID

Veteran Related Documents folder

This folder holds documents that are imported with SSN that match the Veteran SSN.

Today's Documents folder

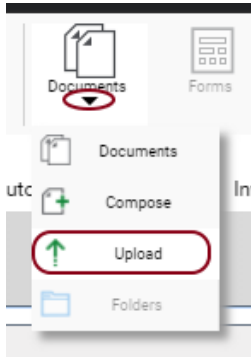
This folder will show documents created or imported on "today's date". These documents will remain in the folder for 24 hours then will no longer appear in this folder (as they do not meet the date criteria) but will be visible in the Related Documents and/or Veteran Related Documents folders. These documents will remain in OnBase for users to be able to retrieve.

Important notes:

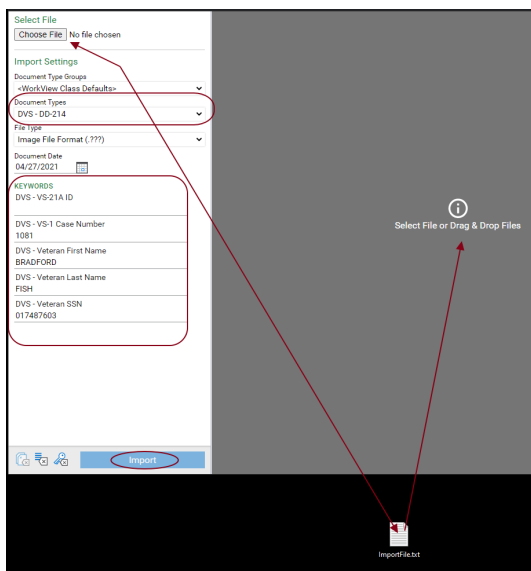
- You may find documents in more than one folder. For example, if documents for "Joe Veteran" are imported with his SSN they will appear in both the Related Documents and Veteran Related Documents folders.
- Related and Veteran Related Documents are related to "a thing (keyword/identifier) and exist for real time retrieval of documents.

Importing Documents

Click the Documents down arrow and choose Upload to import a new document to the current item.



When importing a new document you will have the opportunity to select the Document Type, File Type, and Document Date for the document. You may notice your options for Document Type will change depending on which type of WorkView item you are importing to.



You either choose the document to import by selecting the Choose File button or drag a file to the indicated area.

The File Type will default to the expected type based upon the Document Type selected. You may manually change the File Type to match the document you are uploading if it is a different type.

The Document Date defaults to the current date. You may change the date if needed.

When importing a document the system will automatically set some keyword values for you.

You will then see the notice that your file was imported successfully.

Document Queue (1)

ImportFile.txt	Imported Successfully	X
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