



KMBS ECM PROFESSIONAL SERVICES

DVS - VSO ONBASE USER GUIDE

Table of Contents

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

Attribute indicators	43
Embedded filters	44
Formatted Text	44
Documents	45
Viewing Documents	45
Static folder	45
Importing Documents	46

Web Client Login

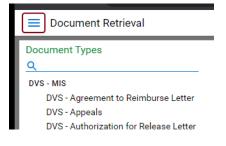
https://massdvs.hylandcloud.com/203IDP/

Enter your Username, Password and click the Login button.

I Hyland IdP	
Login	
Username	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

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.

Applications		
DVS MIS	~	
FILTERS FOR DVS MIS	G	
<u>Q</u>		
FINANCIAL ASSISTANCE CASES	~	
Search my VS-1 applications (VSO)		
Search VS-1 applications (VSO)		
Search my VS-21A applicatons (VSO)		
Search VS-21A (VSO)		
My VS-21A with comments for review (VSO))	Create WorkView Object
My Pending VS-21A (VSO)		
My Active cases for renewal (VSO)		
VETERANS AND APPLICANTS	~	SELECT CLASS
🗸 Search all Persons		
Search all Veterans		An Matanan
Search Veteran and Applicant Pairs		√⊖ Veteran
PERIOD MANAGEMENT	<	
		457 Applicant
Create		

Basic Info

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

Save Save and Close Save	e and New Delete Co	py Object Refresh	History Document	s Forms Discussion
Veteran Detail* Relationsh Veteran - McKinney, Carl M J				
Basic Info				
Last Name* McKinney	First Name* Carl	MI	Suffix Jr	
Full Name McKinney, Carl M Jr SSN 012-34-5678	Date of Birth	Date Deceased		verride - this person is verified to
Gender* Male		US Citizen*	\bigtriangledown	
Ethnicity/Race: This informa Race (Check all that apply) American Indian or Alat Asian Black or African America Hispanic or Latino Slander White Other	ikan Native	I Circumstances (Chec nysical/Mental Impairm earing Impaired sually Impaired terpreter Required gn Language Required	nent	untary.

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
Mackenzie	Mason	
Full Name		
Mackenzie, Mason		🗹 Is Enabled

Is Enabled

-	ls	Ena	bl	led
	10	LING		C G

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. Unchcecking the **"Is Enabled"** box will prevent new VS-1 applications from being created in relation to this veteran.

C	I C .	_
Servio	CO INTO	ר
JUIN		~

Service Info		
Branch Of Service*	Service Start Date	Service End Date
Air Force	▽ 12/14/2013	12/14/2017
Discharge Type		
Honorable discharge		\bigtriangledown
DD-214		
5/4/2021 - DVS - Birth Certificate f	for Case # - Veteran: MCKINNE)	′ CARL - Applicant: 🛛 🗸
Wartime Service Wartime Ser MOS/Rating/AFSC	vice has been determined	

DD-214

DD-214			
	\bigtriangledown	1	

This control allows you import and view the veteran's DD-214. Click the Timport 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

4/27/2021 - DVS - Birth Certificate for Case # - Veteran: MASON MACKENZIE - Applicant: 🗢 个

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 (123)456-7890	Email Address
Phone Type Cellular Street 1*	Email Type Is willing to receive text messages
65 Lambert Ave.	
Street 2	
Apt 1 City*	State ^s Zip Code
Boston	

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*	5	SSN	Date of Birth			
Bravo, Billy	٦ ٩	111-11-1155	1/1/1970			
Applicant Name*	5	SSN	Date of Birth	Relationship To Veteran*		
Bravo, Betty	<mark>م</mark> ا	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 ar	d Applicant					
	Veteran		Applicant		Relationship to Veteran	
	Bravo, Billy	7	Bravo, Betty	7	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				
v	eteran - Alpha, /	Adam					(
	VS-1 Applicatio	n					
	Case	e #	Status	Application Date	City	Applicant	Veteran
	100	44	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.

■ WorkView			OnBase [®]	
Applications		Attributes		
DVS MIS	~	Last N	=	
FILTERS FOR DVS MIS	5	First N	=	
<u>q</u>				
FINANCIAL ASSISTANCE CASES	~	SSN	=	
Search my VS-1 applications (VSO) Search VS-1 applications (VSO)		Date o	=	
Search my VS-21A applicatons (VSO)				
Search VS-21A (VSO) My VS-21A with comments for review (VSO)		City	=	
My Pending VS-21A (VSO)				
My Active cases for renewal (VSO)				
VETERANS AND APPLICANTS	~			
Search all Veterans	Creat	e WorkView Objec	t	×
Search Veteran and Applicant Pairs				
PERIOD MANAGEMENT	SELECT	T CLASS		
	-67 Ve	eteran		
Create	(47 AI	pplicant		
	\sim			
				Cancel

Basic Info

Note: The full name field will populate when saved.

Save Save and Close Save	e and New	Delete	Copy Object	Refresh	History	Documents	Forms	▽ More	
Applicant Detail* Relation		Related Items							Created By: DVS VS
	-								5/4/2021 3:21:44 PM
Basic Info									
Last Name*		First Name*		MI	Suffo	(
McKinney		JoAnn		L					
Full Name									
McKinney, JoAnn L				🗹 Is Enal	oled				
SSN*	Date of E	Birth	Date	Deceased					
000-00-0078	5/6/198	38				Director Over	ride - this per	son is verified to	o be alive
Gender*	Spoken L	anguage	US Ci	itizen					
Female 🗢	English		Q Yes		\bigtriangledown				
Ethnicity/Race: This information	tion is coll	ected to mak	e sure everyo	one is treated	fairly. Your a	nswer is volunt	ary.		
Race (Check all that apply)				Circumstand					
					(_		
American Indian or Alas	kan Nativ	-	D Phy	ysical/Mental	Impairment				
		-		aring Impaire	-				
Black or African Americ				• •					
	an			ually Impaire					
Hispanic or Latino				erpreter Requ					
Native Hawaiian or othe	er Pacific I	slander		in Language F	Required				
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	Q MA Q 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.

a massd	Vsut1.hylandcloud.co		py Object		aspx?Applic		80bjectId=	= 1273808 ~ More	2ClassId=1035&Scr	
Veteran De	tail* Relationships	Related Items								
Veteran - M	cKinney, Carl M Jr								Created By: DVS V 5/4/2021 3:05:48 F	
	he person who will serve reate the Applicant befo			ter all family me	embers.			\cap	Create VS-1	
Veteran a	nd Applicant						51	∂(+)		
	Veteran		Applicant			Relationship	to Create Replace		What to do when a veteran passes away	,
					Show 100	0 🗸 records	-			
massdvsu	arl M Jr (Vet) - (Applican t1.hylandcloud.com/		G	bjectViewer.as	px?applicati	onID=1001&(Dbjectld=12 ▽ More	— 17383&Cli	assid=103	
Veteran and A	oplicant Detail*							0		
McKinney, Carl	M Jr (Vet) - (Applican	it)							d By: DVS VSO 21 3:32:10 PM	
Veteran and Ap	plicant Detail							6	ate VS-1	
Veteran Name		SSN		Date of Birth				Cre	Ref Sin	
McKinney, Ca	rl M Jr	012-34-56	78	2/28/1985					- Replace an with new	
Applicant Nam	e*	Q SSN		Date of Birth		Relationship To	Veteran*	A	oplicant	
4		~								

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

Attributes		(2) LU - DVS Perso	n - Search a	all enabled pe	rsons
Last Name McKinney	=	NAME	TYPE	SSN	DATE
First Name	=	McKinney, Carl M Jr McKinney, JoAnn L	Veteran Applicant	012-34-5678 000-00-0078	2/28, 5/6/1
SSN	=		Applicant	000 00 0070	0/0/1
Date of Birth	=				
City	=				
	/	/			
	/				
Find Find					

Now select the relationship and click Save and Close.

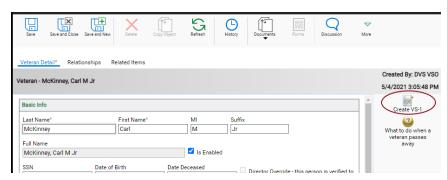
Save and Close Save and New	Delete Copy Object	Refresh History Docume	nts Forms More
Veteran and Applicant Detail*			
McKinney, Carl M Jr (Vet) - (Applicar	nt)		Cr 5/
Veteran and Applicant Detail			
Veteran Name* McKinney, Carl M Jr	SSN 012-34-5678	Date of Birth 2/28/1985	
Applicant Name*	SSN	Date of Birth	Relationship To Veterap*
McKinney, JoAnn L	000-00-0078	5/6/1988	
			Applicant Applicant Applicant
			Spouse Relation to Veteran - Spouse
			Child Relation to Veteran - Child
4			Parent Relation to Veteran -

Now we see the pairing.

Save	Save and Close	Save and New	Delete	Copy Obj	ect Refree	sh	History	Documents	Forms	Discussion	▽ More
Veteran De	etail* Relati	onships Rel	ated Items								
Veteran - N	AcKinney, Carl	M Jr									
		o will serve as a icant before yo				nter all fa	amily men	ibers.			
Veteran a	and Applicant									S S	6 +
	Veteran			A	pplicant				Relationship	to	-
<	McKinney, C	arl M Jr			AcKinney, Jo	Ann L			Spouse	A Breate	VS1
										Replace	VS
•									۰.		
1 - 1 of 1 r	records							Show 100	✓ records		

Create a VS-1

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



Demographics

Information carries over from the detail page. Pleases 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						
011.1		VSO							
City* Boston			\$0						
		_							
Refund Status None	Refund Amount \$0.00	Refun \$0.00	d Balance						
India	00.00	0.00							
Applicant Info									
Full Name									
McKinney, Carl M	l Jr		7						
Date of Birth	SSN		Relationship	To Veteran					
2/28/1985	012-34-5678	В	Applicant						
Gender	US Citizen	Spoken La	nguage						
Male	Yes	English							
Street 1									
65 Lambert Ave.									
Street 2 Apt 1									
City		State	Zip Co						
Boston		MA	0211	9					
Phone Number	Email Addres	s							
(123)456-7890									
Veteran Info									
Full Name			Dat	e of Birth		SSN			
McKinney, Carl M	l Jr			28/1985		012-34-5678			
Branch Of Service		Service	Start Date	Servic	e End Date				
Air Force		12/14			4/2017				
Discharge Type									
Honorable discha	arde								
L	-								
Basic Demographic	ŝ								
Race				Sp	ecial Circur	nstances			
Hispanic or La						Mental Impairme	ent		
	an or Alaskan Native				Hearing Ir				
Asian					Visually Ir				
Black or Africa					Interprete				
	an or other Pacific Island	ler				guage Required			
White				0	ther				
Other				, IL					
1									

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.

	- Boston - 5/4/20	Applications Recipients 021 - McKinney, Carl M Jr	Employment*	Shelter*	Autos	Obligations*	Investments	Insurance	Documents
Lockout									
Locka	out VS-21A 🔲 Mi	ssing Applicant							~
VS-21A A	pplications								G 🔁 🗗 (+)
	ID	VS-21A Date	Status			Benefit Start Da	ite		Submitted Amour
								Show	100 v records

Recipients

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

ousehold Members Seeking Aid	1		s To D -
Last Name	First Name	Date Of Birth	Relationship To Applicant
McKinney	Carl	2/28/1985	Applicant

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*	Lenght 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 Applica	tions Recipients	Employment* She	Iter* Autos	Obligations*	Investments	Insurance	Documents
Case 1101 - Bosto	on - 5/4/2021 - M	IcKinney, Carl M Jr						
Shelter								
Real Estate owne	ed by Applicant an	d/or Spouse						
Applicant Owns Yes	A Home*							
Date of Original I	Mortgage	Original Mortgage An	nount Current Mo	rtgage Balance				
09/24/2000		\$118,000.00	\$112,500	.00				
Multi-family Build	ding 🗸	Monthly Income from	Property					
	ortgage Or Equity							
No		If yes, provid	le complete details on V	S-21A				
Has Sold Or Tran	sferred Real Estat	te Within Past 36 Mor	nths If y	es, dates				
No			\bigtriangledown					
Do you pay any o	of the following:							
Heat/AC separat	te from rent	Electric or gas fo	r cooking					
Yes		✓ Yes	\bigtriangledown					
Telephone, inclu	ding Cell Phone							
Yes		\bigtriangledown						

Autos

Click on the green + sign to add automobiles.

utomobile	es			5	™ ⇒(+)×
	Year	Make	Model	Registration Number	Registration
	2011	Chevy	Chevy Silverado 76JM43		MA ^
	2018	Ford	Edge	72GV3926	MA

Obligations

Please complete all fields in this section.

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

Demographi	cs* VS-21A Applications Recipients	Employment* Shelter* Autos	Obligations* Inve	stments Insurance	Documents
ase 1101 - I	Boston - 5/4/2021 - McKinney, Carl M Jr				
List the deta	ils of all IRAs, Savings Bonds, Money Market ،	Accounts, CDs, 401k accounts, or any	other type of savings, in	vestment or retirement a	count of any kind
Investment	S			57	° ∋(+)×
	Account Name	Account Number	Account Value		\cup
	JPM	98392847723	\$1,450.00		
↓ 1 - 1 of 1 rec	ords			Show 10	0 ✓ records
No	nt transferred any Bonds, Bank Books, or any . account with any other person; created any re	al property trusts, living wills, etc.? iired. Describe fully on the VS-21A.	e beneficiary on any insu	ırance or assigned any in	surance; do you
List all outst	anding creditors and amounts owed, including	j personal loans.		S.	ਙ €
	Creditor Name	Amount Owed		5	
	Lowe's	\$1,305.00			
	Rhodes Dentistry	\$345.00			
	Robinson's Furniture	\$895.00			
↓ 3 of 3 rec	ords			Show 10	► • records
	ails of all bank withdrawals in the past 12 mor	ths other than monthly living expense	·S.		\cap
Bank Withd	rawals	1		5	᠖
	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 rec 	ords			Show 10	► 0 V records

Show 100 v records

Insurance

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

Demographic	s* VS-21A A	applications	Recipients	Employment*	Shelter*	Autos	Obligations*	Investments (Insurance Doe	cuments
Case 1101 - E	8oston - 5/4/20	121 - McKinney,	Carl M Jr						\smile	
Insurance										
Has Life Ins	urance									
Yes	\bigtriangledown]								\cap
Life Insura	nce								S 🛚	∋(+)×
	Name Of Insure	ed		Policy Amoun	nt	Month	ly Premium		Policy Number	\cup
	Carl McKinney			\$100,000.00		\$14.0	D	235MC-234522	7 🔺	
4										• • •
1 - 1 of 1 re	cords								Show 100 •	 records
Dece Applie	ant as Saawaa k	eve Medical Inc.								
Yes	ant or Spouse h	ave medical Insi	urance							
Company N	2000									
Med 1	anne									
Insurance T	VDe									
PPO	ype									
Premium Ar	mount									
\$125.00]								
Medicare A		- Effective Date								
No	\bigtriangledown		0							
Medicare B		Effective Date								
No	\bigtriangledown		0							
Prescription	Drug Plan	Plan Name		Monthly Cost						
Yes	∇	Prescription	Plus	\$35.00						
Prescription	Advantage									
No	\bigtriangledown]								
Low Income	Subsidy									
Yes	\bigtriangledown]								

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
ase 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 🗢 个
Income Verification Authorization Release
5/4/2021 - DVS - DD-214 for Case # 1101 - Veteran: CARL MCKINN 🗢 个
Agreement To Reimburse DOR Letter
5/4/2021 - DVS - DD-214 for Case # 1101 - Veteran: CARL MCKINN 🗢 个
Bank Statement 1 Bank Statement 2
5/4/2021 - DVS - DD-214 for Case # 1101 - Veteran: CARL MCKINN 🗢 个
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
Spouse DOR Letter
Employment Plan
Employment Plan Image: Constraint of the second s
Spouse Employment Plan
Spouse Employment Plan
Image: Spouse Employment Plan Image: Medical Evaluation
Spouse Employment Plan
Image: Spouse Employment Plan Image: Medical Evaluation

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.

	0/01/0001 Etch Dec	ford 1	Created By: JBETTENCOURT
ase 1081 - Fairnavi	en - 3/31/2021 - Fish, Brad	ford J	3/31/2021 10:38:20 AM
Case Maintenance			Initiate Refund
Case #	Status	Application Date*	(VS0)
1081	Saved	3/31/2021	Benefit History
City*		VSO	
Fairhaven	٩	DVS VSO	
Refund Status	Refund Amount	Refund Balance	Create Agreement to Reimburse Letter
None	\$0.00	\$0.00	
Applicant Info			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* Rela	tionships Related Items			
V	eteran - McKinney, Ca	-I M Ir			Created By: DVS VS
v	eteran - wickinney, ca	I M JI			5/4/2021 3:05:48 PM
	Basic Info				Create VS-1
	Last Name*	First Name*	MI	Suffix	
	McKinney	Carl	М	Jr	What to do when a veteran passes
	Full Name		Is Enabled		away
	McKinney, Carl M Jr				
	SSN	Date of Birth	Date Deceased	Director Override this person is verify	
S WorkViewController.ashx - Google Cl					- 🗆 X
massdvsut1.hylandcloud.com/	203AppNet/Workvie	w/WorkViewController.ashx			
	x	1 / 1 -	100% + 🗄	3 \$	± ē :
The second statement	Follo	w these steps when a veterar	with a VS-1 application	on passes away:	<u>^</u>
 A construction of a state of the state of th		Update the veteran record	with the date deceased.		
1		Update the veteran record If no Applicant record exist If no record for the new app	with the date deceased. s for the family membe plicant appears in the Ro	ke over the case follow these steps: elationships view of the veteran then create d the new applicant, execute the task "VS-	

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

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

Hyland Cloud - MassDVSUT1 49 × +								- o ×
\leftarrow \rightarrow C \textcircled{o} https://massdvsut1.hylan	ndcloud.com/2030BAppNet/NavF	anel.asp	х					6 作 🗎 🖤
≡ WorkView			O	nBase ⁻				📩 🛛 Brown, Tracey 🗸
Applications	Attributes		(1) Sea	rch all VS-1	applications		Case # =	९ × ± 🗐 🖶 🔂
DVS MIS 🗸	Case #	=	CASE #	STATUS	APP DATE	CITY	APPLICANT FULL NAME	VETERAN FULL NAME
FILTERS FOR DVS MIS	Status	=	1019	Saved	2/26/2021	Attleboro	Corrigan, James S	Corrigan, James S
✓ Search all VS-1 applications Search my VS-1 applications (VSO)	Application Date	=						
Search VS-1 applications (VSO) Seach all VS-21A applications	City	=						
Search my VS-21A applicatons (VSO) Search VS-21A (VSO)	Veteran Last Name Corr*	=						
My VS-21A for Review (Authorizer) My VS-21A with comments for review (VSO)	Veteran First Name	=						
My Pending VS-21A (VSO) Chief Escalated VS-21A	Applicant Last Name	=						
Director Escalated VS-21A My Active cases for renewal (VSO)	Applicant First Name	=						
City List/VSO Phone Book VETERANS AND APPLICANTS Search all Persons	Applicant SSN	=						
Search all Persons Search all Veterans Search Veteran and Applicant Pairs	Applicant Date of Birth	=						
PERIOD MANAGEMENT <								
SHARED LOOKUP DATA < FINANCIAL ASSISTANCE LOOKUP DATA <								
FINANCIAL ASSISTANCE CORE MAINTENANCE								
STAFF <								
CONFIGURATION ITEMS								
	Find Find							
Create						^		

3. The Demographics tab comes up.

4. Click on the box with the green arrow (blue arrow)

🚯 Case 1019 - Attleboro -	2/26/2021 - Corriga	n, James S - V	/ork - Microsoft E	dge							-		\times
https://massd	/sut1.hylandclo	ud.com/20	3OBAppNet/	WorkView/\	viewer/Obje	ctViewer.	aspx?app	olicationID	=1001&Ob	jectlo	d=1027	46&Cla	s
Save Save and Close	Save and New De	K Copy	Dibject Refresh	History	Documents	Forms	Discussion	∽ More	Тор	gle Tasks		Last 0	Object
Demographics* VS-2	1A Applications	Recipients	Employment*	Shelter* Au	utos Obligat	ions* Inve	estments	Insurance	Documents	\bigtriangledown		d By: EVA	11/00
Case 1019 - Attleboro - 2	2/26/2021 - Corriga	an, James S										21 10:16:3	
Case Maintenance											Init	iate Refun	d
Case #	Status		Application Date	e*								(VSO)	u
1019	Saved		2/26/2021										
City*		VS0									Init	iate Refun	d
Attleboro	(🔍 evan VS	0										
Refund Status	Refund Amount	Refund I	Balance								Be	nefit Histor	у
None	\$0.00	\$0.00											
Applicant Info										i 🗌			
Full Name			1										
Corrigan, James S													
Date of Birth	SSN		Relationship	Veteran									
11/2/1969	035-48-4255		Applicant										
Gender	US Citizen	Spoken Lan	guage										
Male	Yes	English											
Street 1													
100 Fisher Street #2													
Street 2													
City Attleboro		State	Zip Code 02703										
Attieboro		MA	02703										
Phone Number	Email Address												
(401)390-6091	jamescorriga	an1969@gma	il.com										
Veteran Info										-			

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

© Veteran - Corrigan, James S - Work - Microsoft Edge		-	
	-ec88-	406c-85	56-a90
Les See Set d'are See Set d'are Set set set set set set set set set set s) Object	Next Object	Last Object
Veteran Detailt Relationships Related Items Annulles Related Items Admin Women Veterans' Network Veteran - Corrigan, James S			TBROWN150 1 2:19:24 PM
Basic Info	-		/
Last Name* First Name* MI Suffix Corrigan James S		1	te VS-1 Annuity
Corrigan, James S			do when a
SSN Date of Birth Date Deceased Date Director Override - this person is verified to be alive			n passes way
Gender* Spoken Language US Citizen*			
Male Construction Ves Enhistly/Race: This information is collected to make sure everyone is treated fairly. Your answer is voluntary. Special Circumstances (Check all that apply) Race (Check all that apply) Special Circumstances (Check all that apply)			
American Indian or Alaskan Native Physical/Mental Impairment			
Asian Hearing Impaired			
Black or African American Visually Impaired			
Hispanic or Latino Interpreter Required			
Native Hawailan or other Pacific Islander Sign Language Required White Other			
U White Other			
Service Info			
Branch Of Service* Service Start Date Service End Date Army V 19/8/2006 Ell S/24/2009 Ell			
Luni A Liverado En laratzoo En	-		

7. Double click on the Veteran and Applicant

Veterar	n - Corrigan, James S - Work - Micros	soft Edge								- 🗆 ×
🖯 ht	tps://massdvsut1.hylandclo	ud.com/20	3OBAppNet/WorkView/Viev	ver/Obj	ectViewer.aspx?applic	ationID=10	01&ObjectId=102651	&ClassId=1035&ScreenId=1017&OBToken	=709d4f7e-ec8	8-406c-8556-a90
Save	Save and Close Save and New	elete Copy	Soject Refresh History	¶∎ Documenta	Forms Discussion	↓ More	Toggle Tasks	First	Object Previous Object	Next Object
Veteran			uities Related Items Admin A T D	Women	Veterans' Network					Created By: TBROWN1
/eteran -	Corrigan, James S									2/23/2021 2:19:24 F
Enter on You mus	ly the person who will serve as an ap st create the Applicant before you ca	pplicant for be an create the re	nefits. Do not enter all family member lationship.	rs.						Create VS-1
Vetera	n and Applicant								s 🛚 +	Erte
	Veteran		Applicant		Relationship to Veteran					Create Annuity
Þ	Corrigan, James S	5	Corrigan, Nancy	5	Widow			*	Create Ann	What to do when a veteran passes
									Create VS1	away
									Replace VS	
4										
1 - 1 of	1 records							Show 100 v records		
Relatio	onships where one Veteran is claimin	ng benefits of a	nother veteran					I	S	
	Veteran		Applicant		Relationship to Veteran				× ^	
								A	Create Ann	
								-	Create VS1	
								Show 100 v records	·	
				_		_				
	O Tupe here to search		н; 🥅 🚄			V TI 🦛	<u></u>		A 9 11 -	12:16 PM

- 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)

https://massdvsutl.hylandcloud.com/2030BAppNet/WorkView/View/Viewer/Object/Viewer.aspx?applicationID=100180bjectd1=10265784Clasdl. Image: I	🚯 Corrigan, James S (Vet) - Corrigan, Nancy (Ap	olicant) - Work - Microsoft Ed	ge			- 🗆 ×
See Save and Dece Save and Dece Deteor Copy State Netro Object Last Object Veteran and Applicant Detail* Created By: TBROWNISD Created By: TBROWNISD Veteran and Applicant Detail* Created By: TBROWNISD Veteran and Applicant Detail* Created By: TBROWNISD Veteran and Applicant Detail* Created By: TBROWNISD Veteran and Applicant Detail Created By: TBROWNISD Veteran wane* SSN Date of Birth Corrigan, James S SSN Date of Birth Corrigan, Nancy SSN Date of Birth Corrigan, Nancy SSN Date of Birth Corrigan, Nancy SSN Date of Birth Relationship To Veteran* Created Applicant Nerwer Corrigan, Nancy SSN Date of Birth Relationship To Veteran* Created Annuty	https://massdvsut1.hylandcloud	d.com/2030BAppNet/	WorkView/Viewer/Ob	jectViewer.aspx?applica	tionID=1001&ObjectId	=102657&ClassId
Corrigan, James S (Vet) - Corrigan, Nancy (Applicant)			С Ц			Next Object
Veteran and Applicant Detail Veteran Name* Corrigan, James S Image: SN Oplicant Name* SSN Date of Birth Pelationship To Veteran* SSN SSN Date of Birth Relationship To Veteran* Corrigan, Nancy SS SS2-85-8585 1/1/1/1950 Window	V	nnlicant)				Created By: TBROWN150
Veteran Name* SN Date of Birth Corrigan, James S I/2 035-48-4255 11/2/1969 Applicant Name* SN Date of Birth Relationship To Veteran* Corrigan, Nancy SN Date of Birth Relationship To Veteran* Corrigan, Nancy S2:85-8585 1/1/1/1950 Widow Create Annulty	Conigan, James 5 (Vet) - Conigan, Hancy (A	ppicanty				2/24/2021 8:47:56 AM
Veteran Warne* SN Date of Birth Corrigan, James S Q Q3-548-4255 11/2/1969 Applicant Name* SN Date of Birth Relationship To Veteran* Corrigan, Nancy Q 852-85-8585 1/1/1950 Widow Image: Corrigan, Nancy	Veteran and Applicant Detail					
Corrigan, James S I/I/2/1969 Applicant Name* SN Corrigan, Nancy SN B52-85-8585 1/1/1950 Widow Create Annuity	Veteran Name*	SSN	Date of Birth			
Applicant Name* SN Date of Birth Relationship To Veteran* Veteran with new Applicant Corrigan, Nancy R & B52-85-8585 1/1/1/1950 Widow Create Annuity	Corrigan, James S 🗖 🔍	035-48-4255	11/2/1969			
Corrigan, Nancy (S2-63-6385) (7/7/950) (Videow Create Annuity Create Annuity						Veteran with new
	Corrigan, Nancy	852-85-8585	1/1/1950	Widow 🗢		
						Create Annuity
H: T C C C C C - S						
H: T C C C C ~ S						
HI 🚍 💪 💽 S 📭 KI 🌀 A S						
H = 6 0 S or we xi o ~ s						
H 🚍 🧀 S 📭 W3 X1 🎯 - S						
H TH CO C C C C C C C C C C C C C C C C C C						
H = 6 0 S 01 ×1 0 ^ S						
H = 6 0 S 02 w1 x1 0 ^ S						
H = 6 2 S or w1 ×1 0 ^ S						
井 🚍 🧀 🕄 📭 🛛 🔿 × I 🌀 🔿 × S						
井 🚍 🧀 🕄 💶 wiii xii 🌀 — ^ S						
井 🚍 🧀 🕄 💶 wii xii 🧿 🔨 ^ S						
H 🚍 🤗 💽 🔽 🖬 XI 🌖 — ^ S						
H 🚍 🤗 💽 🖸 🗤 🗴 🌖 ^ \$						
H 📜 💪 💽 🕄 🚾 💵 🗴 🌖 🔨 🔨 😵						
	其+ 🥫 🤇	🗧 💽 😒 🖸	y wi xi (~ \$

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

9	Contgan, Jar	mes 5 (Vet) - C	loeigan, Nan	ky (Applican	0 - Work - Mi	crosoft Edge						-		×
(https:/	//massdvsu	ut1.hyland	dcloud.cor	m/2030BA	ppNet/Wo	orkView/V	iewer/Obje	ctViewer.	aspx?applicationIt	0=1001&Objectid=1	026578	kClassi	d
		rrisi Ieraction ou sure?	TTFR:	V	(No. 1	2	•	(F)		0		N	3	×
0							D	No No						15 2

11. Click save and close

							lassId
Devere Coar Otherst	Refress History	Doourners Form		▽ More	Toggie Tasks	Next Object	Last Otaes
(Applicant)							1 8:47:56 A
000	Data (Data)						te VS-1
and the second s	11/2/1969						(7
SSN	Date of Birth	Relation	ship To Veteran"			Veterar	Replace with new
\$ 852-85-8585	1/1/1950	Widow	v	1		App	plicant
y	y (Applicant) (Applicant) SSN 035-48-4255 SSN	y (Applicant) SSN Date of Birth SSN Date of Birth SSN Date of Birth SSN Date of Birth	SSN Date of Birth Q 035-48-4255 11/2/1969 SSN Date of Birth	SSN Date of Birth Hildory Doolynamics Forms Discussion SSN Date of Birth 11/2/1969 SSN Date of Birth Relationship To Veteran*	Deter Date of Birth More V (Applicant) Date of Birth More SSN Date of Birth Relationship To Veteran* SSN Date of Birth Relationship To Veteran*	Detex Date of Birth Ports Discussion Nore Togge Tasks y (Applicant)	Deer Date of Birth Relationship To Veteran* Over Togge Tasks Nove Togge Tasks Nee Operated By: y (Applicant) 2/24/202 Created By: 2/24/202 SSN Date of Birth Created By: Y SSN Date of Birth Relationship To Veteran* Veteran*

12. Click save and close again.

③ Veteran - Corrigan, James S - Work - Microsoft Edge	- 🗆 🗙
thtps://massdvsut1.hylandcloud.com/2030BAppNet/WorkView/Viewer/ObjectViewer.aspx?applicationID=1001&ObjectId=102651&Classid=1035&ScreenId=1017&OBToken=709d4f7e-c	c88-406c-8556-a90
See 2	oject Next Object Last Object
Veteran Detail* Relationships Related Items Annulities Related Items Admin Women Veterans Network 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 banefits. Do not enter all family members. You must create the Applicant before you can create the relationship.	Create VS-1
Veteran and Applicant S 😨 +	
Veteran Applicant Relationship to Veteran Crist Ann Crist Ann Corrigan, James S C Corrigan, Nancy C Widow Crist Ann Replace V3 Replace V3 Crist Ann Crist Ann Crist Ann Replace V3 Replace V3 Crist Ann Crit Ann Crist Ann Crist Ann	- Create Annuity What to do when a veteran passes away
Relationships where one Veteran is claiming benefits of another veteran SS	1
Veteran Applicant Relationship to Veteran Crade Ann.	

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)

WorkView - Work - Microsoft Edge							- 🗆 ×
fttps://massdvsut1.hylandcloud	d.com/2030BAppNet/	/Workview/View	ver/ObjectVi	ewer.aspx?Ap	plicationId=	1001&Objec	tld=102746&Clas
Save Save and Close Save and New Delet	e Copy Object Refresh			orms Discussio	n More	Toggle Ta	sks Last Object
Demographics* US-21A Applications Re S Case 1019 - Attleboro - 2/26/2021 - Corrigan	ecipients Employme R E h, Nancy	H A	Obligations*	Investments	Insurance N	Documents	Created By: EVANVSO 2/26/2021 10:16:39 AM
Case Maintenance							Initiate Refund
Case # Status	Applicatio						(VSO)
1019 Saved	2/26/2021	0					
City*	VSO						Initiate Refund
Attleboro Q	evan VSO						
Refund Status Refund Amount	Refund Balance						Benefit History
None \$0.00	\$0.00			_			
Applicant Info							
Full Name							
Corrigan, Nancy							
Date of Birth SSN	Relationship To	Veteran					
1/1/1950 852-85-8585	Widow						
Gender US Citizen	Spoken Language						
Female Yes	English						
Street 1							
600 Wash							
Street 2							
City	State Zip Code						
Boston	MA 0211						
Phone Number Email Address							
Veteran Info							

Now update all the tabs to the widow/er.

Creating the VS-21A

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

Save	Save and Close Save	ve and New Delete	Copy Object	Refresh Histo	- 4 1	Forms Disc	Cussion ✓	Toggle	Tasks
Demograp ase 1101		Applications Recipie		nt* Shelter*	Autos Obligat	ions* Investmen	nts Insurance	Documents	
Lockout	out VS-21A 🗌 Mi	ssing Applicant						~	
VS-21A A	pplications							; 🚡 🗩 🕂)×
	ID	VS-21A Date	Status		Benefit	Start Date		Submitted Amo	unt
									4

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

	SO) Case History				
S-21A Case 1101 - Bos	ston - 5/4/2021 - U	Insubmitted			
Basic Information					
Case #	Status	Ap	plicant	ID	
1101	Unsubmitte	ed M	IcKinney, Carl M Jr	12298	
City		vso			
Boston		DVS VSO			
Calculations					
Please enter the followi	ing to derive the ber	nefits			
VS-21A Date* 5/4/2021		Budge	t Number*	Refund Status None	_
# in Family		Benefit	t Start Date*	Refund Amount	
1			٩	\$0.00	
Rent/Mortgage Amt (A	pplicant Portion On		ing Expenses*	Refund Balance	
\$0.00		1		\$0.00	
Is Heat Included*					
	\bigtriangledown				
Monthly Income				Benefits Calculations	
				Benefits Calculations	
	Applicant	Spourse	Children		
V.A. Pension	Applicant	Spouse	Children	Budget Amount	
	Applicant	Spouse	Children	Budget Amount Shelter Benefit +	
V.A. Comp	Applicant	Spouse	Children	Budget Amount Shelter Benefit + Children Budget +	
V.A. Comp Social Security	Applicant	Spouse	Children	Budget Amount Shelter Benefit + Children Budget + REBA +	
V.A. Comp Social Security Social Disability	Applicant	Spouse	Children	Budget Amount Shelter Benefit + Children Budget +	
V.A. Comp Social Security Social Disability S.S.I.	Applicant	Spouse	Children	Budget Amount Shelter Benefit + Children Budget + REBA + = Total Ordinary Benefit	- Total Income
V.A. Comp Social Security Social Disability S.S.I. Retirement	Applicant	Spouse	Children	Budget Amount Shelter Benefit + Children Budget + REBA + = Total Ordinary Benefit = Net Ordinary Benefits	- Total Income
V.A. Comp Social Security Social Disability S.S.I. Retirement Countable Wages	Applicant	Spouse	Children	Budget Amount Shelter Benefit + Children Budget + REBA + = Total Ordinary Benefit = Net Ordinary Benefits Fuel Benefit +	
V.A. Comp Social Security Social Disability S.S.I. Retirement Countable Wages Unemployment	Applicant	Spouse	Children	Budget Amount Shelter Benefit + Children Budget + REBA + = Total Ordinary Benefit = Net Ordinary Benefits	
V.A. Comp Social Security Social Disability S.S.I. Retirement Countable Wages Unemployment Workmen's Comp	Applicant	Spouse	Children	Budget Amount Shelter Benefit + Children Budget + REBA + = Total Ordinary Benefit = Net Ordinary Benefits Fuel Benefit +	
V.A. Comp Social Security Social Disability S.S.I. Retirement Countable Wages Unemployment Workmen's Comp Long-Term Disability	Applicant	Spouse	Children	Budget Amount Shelter Benefit + Children Budget + REBA + = Total Ordinary Benefit = Net Ordinary Benefits Fuel Benefit +	
V.A. Comp Social Security Social Disability S.S.I. Retirement Countable Wages Unemployment Workmen's Comp Long-Term Disability Sick Leave	Applicant	Spouse	Children	Budget Amount Shelter Benefit + Children Budget + REBA + = Total Ordinary Benefit = Net Ordinary Benefits Fuel Benefit +	
V.A. Comp Social Security Social Disability S.S.I. Retirement Countable Wages Unemployment Workmen's Comp Long-Term Disability	Applicant	Spouse	Children	Budget Amount Shelter Benefit + Children Budget + REBA + = Total Ordinary Benefit = Net Ordinary Benefits Fuel Benefit +	
V.A. Comp Social Security Social Disability S.S.I. Retirement Countable Wages Unemployment Workmen's Comp Long-Term Disability Sick Leave	Applicant	Spouse	Children	Budget Amount Shelter Benefit + Children Budget + REBA + = Total Ordinary Benefit = Net Ordinary Benefits Fuel Benefit +	
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		Spouse		Budget Amount Shelter Benefit + Children Budget + REBA + = Total Ordinary Benefit = Net Ordinary Benefits Fuel Benefit +	
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 Medical Only Calculatio		Spouse		Budget Amount Shelter Benefit + Children Budget + REBA + = Total Ordinary Benefit = Net Ordinary Benefits Fuel Benefit + = Total Payable Benefit Amoun	
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 Medical Only Calculation		Spouse		Budget Amount Shelter Benefit + Children Budget + REBA + = Total Ordinary Benefit = Net Ordinary Benefits Fuel Benefit + = Total Payable Benefit Amoun	
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 Medical Only Calculatio		Spouse		Budget Amount Shelter Benefit + Children Budget + REBA + = Total Ordinary Benefit = Net Ordinary Benefits Fuel Benefit + = Total Payable Benefit Amoun	

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

S-21A* Benefits (V	SO) Case History					
-21A Case 1101 - Bo	ston - 5/4/2021 - Uns	ubmitted				
Basic Information						
Case #	Status		Applicant		ID	
1101	Unsubmitted		McKinney, Car	rl M Jr	12298	
City		VSO				
Boston		DVS VSC)			
Calculations						
Please enter the follow	ing to derive the benefit	s				
VS-21A Date*		Buc	dget Number*		Refund Status	
5/4/2021			Single	\bigtriangledown	None	
# in Family		Ber	nefit Start Date*		Refund Amount	
1		4/	1/2021	Q	\$0.00	
Rent/Mortgage Amt (A	Applicant Portion Only)*	# S	haring Expenses	*	Refund Balance	
\$0.00		1			\$0.00	
Is Heat Included*						
No	\bigtriangledown					
Monthly Income					Benefits Calculations	
	Applicant	Spouse	Chi	ldren	Budget Amount	\$747.00
V.A. Pension					Shelter Benefit +	\$0.00
V.A. Comp					Children Budget +	\$0.00
Social Security					REBA +	\$0.00
Social Disability					= Total Ordinary Benefit	\$747.00
S.S.I.						<i>v</i>
Retirement						- Total Income
					= Net Ordinary Benefits	
]			= Net Ordinary Benefits Fuel Benefit +	- Total Income
Countable Wages]			-	- Total Income \$747.00 \$302.00
Countable Wages Unemployment]			Fuel Benefit +	- Total Income \$747.00 \$302.00
Countable Wages Unemployment Workmen's Comp					Fuel Benefit +	- Total Income \$747.00 \$302.00
Countable Wages Unemployment Workmen's Comp Long-Term Disability					Fuel Benefit +	- Total Income \$747.00 \$302.00
Countable Wages Unemployment Workmen's Comp Long-Term Disability Sick Leave					Fuel Benefit +	- Total Income \$747.00 \$302.00
Countable Wages Unemployment Workmen's Comp Long-Term Disability Sick Leave Other Income					Fuel Benefit +	- Total Income \$747.00 \$302.00
Countable Wages Unemployment Workmen's Comp Long-Term Disability Sick Leave Other Income Total Income	\$0.00				Fuel Benefit + = Total Payable Benefit Amount	- Total Income \$747.00 \$302.00
Countable Wages Unemployment Workmen's Comp Long-Term Disability Sick Leave Other Income Total Income	\$0.00			Calculate Be	Fuel Benefit + = Total Payable Benefit Amount	- Total Income \$747.00 \$302.00
Countable Wages Unemployment Workmen's Comp Long-Term Disability Sick Leave Other Income Total Income	\$0.00			Calculate Be	Fuel Benefit + = Total Payable Benefit Amount	- Total Income \$747.00 \$302.00
Countable Wages Unemployment Workmen's Comp Long-Term Disability Sick Leave Other Income Total Income Medical Only Calculat	\$0.00			Calculate Be	Fuel Benefit + = Total Payable Benefit Amount	- Total Income \$747.00 \$302.00

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.

	Demographi	cs* VS-21A Applicati	ons Recipients	Employment	Shelter	Autos	Obligations	Investments	Insurance	Document	s				
c	Case 10007	- Buckland - 5/6/2020 -	Buckland, Bill							0		ed By /24/2			
	Lockout	t VS-21A 🗌 Missing Ap	plicant												
	VS-21A Ap	plications								KX KX	53	6	→	+ >	×
		Object ID	ID	VS-21A Date		Status		Be	nefit Start Date					Subm	nitte
		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.

	VS-21A* Benefits	(VSO) Case H	listory										
v	S-21A Case 1101 -	Boston - 5/4/202	21 - Unsubmitter									Created By: DVS	VSO
		5031011 0,4,202										5/4/2021 6:04:36	PM
	Benefit Summary											Amend Open	
	Net Ordinary Benefit \$747.00	t Amount	Fuel Benefr	t Amount		Total Payable \$1,049.00	Benefit Am	ount				Benefits	
	1.		+ \$302.00		=	Spend Down (if > \$0)					Send to Authorize	er
	Prior Approval					\$0.00							
ľ	VSO Benefits								1	560	Ŧ	Notice of Determination	
	Month	ОВ	FL	uel I	Doctor	Me	dical	Hospita		Dental			
											*	Notice of Intent Letter	
VS-:	21A Benefit - Google	Chrome										- 0	>
			ppNet/WorkVi	ew/Viewer/Obie	ctViewer.	.aspx?applica	tionID=10	01&ObjectId=	127399&C	lassId=10478	ιScreenId	I=1043&OBToken=	841
			< (47		Ф	(47)			∇			Ν	ΝΠ
Save			elete Copy Obje	ect Refresh	History	Documents	Forms	Discussion	More			Next Object La	VU st Objec
	\smile					•							
SO E	Benefit												
												Created By: D	VS VS
-21/	A Benefit											5/4/2021 6:1	3:05 F
/S-2	21A												
Case	e #	VS-21A Statu	s A	pplicant									
110	01	Unsubmitte	d 🗔 I	McKinney, Carl M	Jr								
/S0	Benefit		/										
Mon	nth		<u> </u>										
4/1	/2021	Q											
DВ		Fuel		ctor		dical		ospital		ental		Misc	
\$0.(00	\$0.00	\$2	275.00	\$0.	.00	5	0.00	S.	0.00		\$0.00	
Dese	cription		Delete										

	VS-21A*	Benefits (VSO) Ca	ise History								
v	/S-21A Case	e 1101 - Boston - 5/4	/2021 - Unsubmit	tted							
	Benefit Sur	mmary									
	Net Ordina \$747.00	ry Benefit Amount		Fuel Benefit Amount + \$302.00 =			Total Payable Benefit Amount \$1,049.00				
	Prior A	pproval				end Do 0.00	wn (if > \$0)				
									0 G S	76 €	+
	VSO Benef	its									
	VSO Benef	Month	OB	Fuel	Doctor		Medical	Hospital		Dental	·
	VSO Benef		OB \$0.00	Fuel \$0.00		275.00	Medical \$0.00	Hospital	\$0.00		
	VSO Benef	Month						Hospital			_
	VSO Benef	Month						Hospital			_
	VSO Benef	Month						Hospital			_

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	s (VSO) Case History			
VS 214 Case 1101	Boston - 5/4/2021 - Uns	ub maintained		Created By: DVS VS
v5-21A Case 1101 -	Boston - 5/4/2021 - Uns	abmitted		5/4/2021 6:04:36 P
Basic Information				Amend Open
Case #	Status	Applicant	ID	Benefits
1101	Unsubmitted	McKinney, Carl M Jr	12298	(\rightarrow)
City		VSO		Send to Authorizer
Boston		DVS VSO		Notice of Determination
Calculations				

Click Toggle Tasks to turn panel on/off.



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* Benefit	ts (VSO) Case History					
VC 014 Coop 1101	Boston E/4/2021 An	around				Created By: DVS VSO
V3-ZTA Gase TTUT	- Boston - 5/4/2021 - Ap	proved				5/4/2021 6:04:36 PM
Basic Information	Status	Applicant		ID		Notice of Determination
1101	Approved	McKinney, Carl	/I Jr	12298		(Notes the second seco
City		VSO				Notice of Intent Letter
Boston		DVS VSO				
Calculations Please enter the for	blowing to derive the benef	fits				Notice of Action Completed

Escalating VS-21As

I.

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.

VS-21A* Benefits (VSO) Case H	story		
VS-21A Case 1101 - Boston - 5/4/202	1 Depied		Created By: DVS VSC
v5-21A Case 1101 - Boston - 5/4/202	1 - Denied		5/4/2021 6:35:02 PM
Basic Information			Escalate
Case # Status	Applicant	ID	
1101 Denied	McKinney, Carl M Jr	12300	Notice of
City	vso		Determination
Boston	DVS VSO		Notice of Intent
			Letter
Calculations			
Please enter the following to derive the	henefits		Notice of Action
r lease circle are following to derive an	benents		
VS-21A Date*	Budget Number*	Refund Status	Completed
5/4/2021	1 - Single	None	

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

Amending Open Benefits

1. Go to the VS-21A Applications.

3 Case 1075 - Boston - 3/2:	3/2021 - Moo, Mark - Work -	Microsoft Edge								-	
https://massdvs	ut1.hylandcloud.com/	/203OBAppNet/WorkView/	Viewer/ObjectViev	ver.aspx?applic	ationID=10	01&ObjectId=10514	48&ClassId=1002&Screer	ld=1001&OBToken=4e	5ce889-29	d4-48ea-a7	7d2-66
Save Save and Close	Save and New Delete C	Copy Object Refresh	Documents Form	B Discussion	↓ More	Toggle Tasks		First Object	A Previous Object	Next Object	Last Object
Demographics* VS-21/	A Applications Recipients	s Employment* Shelter* A	utos Obligations*	Investments In	surance Doo	cuments Repayments	Admin (Director and Chief)				
Case 1075 - Boston - 3/22	- Moo, Mark									Created By:	
											1 9:08:37 AN
Case Maintenarios Case # 1075 City* Boston Refund Status Settlement Applicant Info Full Name	nount Refu	Application Date* 3/23/2021								Waive	Sefund it History
Moo, Mark		7									
Date of Birth	SSN	Relationship To Veteran									
1/1/1950	880-00-0000	Applicant									
Gender	US Citizen Spoken	Language									
Male	Yes										
Street 1											
600 wash st											
Street 2											
City	State										
Boston	MA	02111									
Phone Number	Email Address										
Veteran Info											
		D 1 (D)1	0000								

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

3. Click on the green +.

G Save		Ind New Delete Co		Courments Forms Discussion More	Toggie Tasks		[]	A Previous Objec	Next Object	Last Obje
Jave	Save and Close Save	Dereve Co	py capeta Mendelli Indikiy M	ocuments Forms Discussion More	Tuggie Tesna		Pile Object	Premous objec	i nexi osjesi	Last Oup
emograph	ics* VS-21A Ap		Employment* Shelter* Autos	Obligations* Investments Insurance		Admin (Director and Chief)				
D se 1075 -	Boston - 3/23/20	21 - Moo, Mark	E H A	0 1 N	C P	м			Created By: 1	
									3/23/2021	1 9:08:3 Š
.ockout	ut VS-21A 🗌 Miss								Waive	Refund
		ing Applicant								t Histor
	oplications						SS 76 🗩	+ ×		
		VS-21A Date 4/7/2021	Status	5/1/2021	Submitted Amount \$500.00	Authorized Amount \$500.00	Is Amended	\frown		
		4/7/2021	Approved	5/1/2021	\$50.00	\$50.00	_			
	12260	4/7/2021	Submitted	5/1/2021	\$150.00	\$150.00				
	12259	4/7/2021	Approved	4/1/2021	\$200.00	\$200.00				
	12258	4/7/2021	Submitted	4/1/2021	\$50.00	\$50.00				
	12257	4/7/2021	Submitted	4/1/2021	\$150.00	\$150.00	v			
	12248	3/24/2021	Approved	4/1/2021	\$0.00	\$0.00				
	12247	3/24/2021	Approved	4/1/2021	\$650.00	\$650.00	 Image: A start of the start of			
	12243	3/23/2021	Approved	3/1/2021	\$4,385.00	\$4,385.00	~			
	12242	3/23/2021	Approved	3/1/2021	\$4,385.00	\$4,385.00	×	-		
- 15 of 15	5 records						Show 100 v rec	cords		

- 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 - Unsub	mitted - Work - Micros	oft Edge					-	- 🗆 🗙
🕆 https://ma	assdvsut1.hylandcloud	.com/2030BAppN	let/WorkView/View	er/ObjectViewer.asp	?applicationID=10	01&ObjectId=105465	&ClassId=1018&ScreenId=	1022&OBT	oken=4e5c
Save Save and	Close Save and New Delete	Copy Object Re	Greah History Do	Conception Forms D	Q ▽ scussion More	Toggle Tasks	First Object Previou	s Object Next C	bject Last Object
VS-21A* Benefi	ts (Authorizer) Benefits (V	/SO) Authorizer Con	nments Case History	Admin (Director and Chi	ef) Repayments				
VC 214 Case 1075	- Boston - 4/8/2021 - Unsu	6						Cre	ated By: TBROWN
v5-21A Case 1075	- Boston - 4/6/2021 - Onsu	binitted						4/8/	2021 11:21:38 AM
Basic Information								Î	Amend Open
Case #	Status	Applicant Moo, Mar	k	ID 12264					Benefits
City	onousmitted	VSO		12201					
Boston		Brown, Tracey							
Calculations									
VS-21A Date* 4/8/2021 # in Family 1	In the part of the]	Budget Number* 1 - Single Benefit Start Date* # Sharing * uses* 1	▼	Set Refu \$20 Refu	nd Status Ierement 0.00 nd Balance 0.00			
Monthly Income	Applicant	Spous		Children		15			
V.A. Pension	\$145.00	500.		onna cr	Budget Amount Shelter Benefit +				
V.A. Comp					Children Budget +				

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

VS-21A Ca	ase 1075 - Boston	- 4/8/2021 -	- Unsubmitte	ed - Work - Microso	ft Edge							-	
🗇 http:	s://massdvsut	1.hyland	cloud.cor	n/203OBAppN	et/WorkView/Viev	ver/ObjectView	er.aspx?applicationID	=1001&ObjectIc	l=105465&Clas	sld=1018&Screen	ld=10228	OBToken	=4e5c
Save	Save and Close Sav	e and New	Delete	Copy Object Ref	esh History	Documents Forms	Discussion More	Toggle Tasks		First Object P	A revious Object	Next Object	Last Object
VS-21A* S VS-21A Cas	Benefits (Author B se 1075 - Boston			Authorizer Com	nents Case History	Admin (Director	and Chief) Repayments				N		By: TBROWN
Benefit Su	immary ary Benefit Amoun			Fuel Benefit A	mount		Total Payable Benefit Amo	unt				Amen	d Open lefits
Prior A				+		=	\$0.00 Spend Down (if > \$0)				7		
VSO Bene	fits									/ @ \$ 76 €	+		
	Month	ОВ		Fuel	Doctor	Medical	Hospital	Dental	Misc	Description			
										Show 100 - records	~		
Repeat E	Benefit Row	imes											
VSO Comm	nent												

- 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.

S21A Case 1065 - Ashby - 4/8/2021 - Unsubmitted					Toggle Tasks	Discussion More	Jocuments Forms		Copy Object Refm		Save and	e Save and Close
Net Ordinary Enerfit Amount Total Payable Benefit Amount Total Payable Benefit Amount National Amount	ated By: TBR 021 11:30:5					Chief) Repayments	Admin (Director and	nents Case History	-			,
Vet Ordinary Benefit Amount Fuel Benefit Amount Total Payable Benefit Amount Spend Down (r) \$ 00: 00: 00: 00: 00: 00: 00: 00: 00: 0	Amend Open	*										efit Summary
NO Deterful So C C C I OCC	Benefits → ad to Authoria	B Send t			nount	\$501.00 Spend Down (if > \$0)	=	Amount			nount	1.00
2/1/2021 5 5 5 5 0 5 0 5 0 0 0 Notice 2/1/2021 7 3 0.00	Notice of etermination		∥ 🤋 5 🔁 🕂									Benefits
2/1/2021 \overline{\sigma} \$\$0.00	otice of Inter	Notic	escription	Misc	Dental	Hospital	Medical	Doctor	Fuel	OB		Month
	Letter		*	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$501.00	R	2/1/2021
3/1/2021 🕅 \$501.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00	tice of Actio	Notic	ye Glasses	\$250.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	2	2/1/2021
				\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$501.00	A.	3/1/2021
4/1/2021 д \$501.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00				\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$501.00		4/1/2021
5/1/2021 🗔 \$501.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00				\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$501.00	7	5/1/2021
6/1/2021 🗔 \$501.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00				\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$501.00	7	6/1/2021
6/1/2021 万 \$501.00 \$0.0				\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$501.00	5	

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

VS-21A Benefit - Wo	ork - Microsoft Edge									-	
https://mas	sdvsut1.hylandcloud.cc	om/2030BAppNet/W	orkView/Viewer/0	DbjectViewer.	.aspx?applica	tionID=1001	&ObjectId=105488&Clas	sId=1047&	ScreenId=	1043&OBT	oken
Save Save and C	Iose Save and New Delete	Copy Object Refresh	History Docume	nts Forms	Discussion	↓ More		First Object	Previous Object	Next Object	Last Obje
	VSO Benefit									Created E	SV: TBRO
S-21A Benefit										4/8/2021 1	
VS-21A											
Case # 1065	VS-21A Status Unsubmitted	Applicant Pop, Peter									
VSO Benefit											
Month 2/1/2021	٩										
ОВ	Fuel	Doctor		Medical		Hospital	Dental		Misc		
\$501.00	\$0.00	\$0.00		\$0.00		\$0.00	\$0.00		\$0.00		
Description	Q	Delete									
	Ч.										

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

-21A* 21A Cas	Benefits (Aut		Benefits (VSO) 2021 - Unsubmitt	-	nents Case History	Admin (Director and	d Chief) Repayments				Created By: TBRC 4/8/2021 11:30:52
enefit Su	mmary										- 0
let Ordina \$501.00		ount		Fuel Benefit + \$0.00	Amount		Total Payable Benefit An \$501.00 Spend Down (if > \$0) \$0.00	nount			Amend Open Benefits → Send to Authorize
/SO Bene	fits									/ 0 5 6 0	+ Notice of Determination
	Month		ОВ	Fuel	Doctor	Medical	Hospital	Dental	Misc	Description	Notice of Intent
	2/1/2021		\$501.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00		Letter
	2/1/2021	5	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$250.00	Eye Glasses	Notice of Action
	3/1/2021	۶.	\$501.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00		
	4/1/2021	5	\$501.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00		
	5/1/2021	5	\$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/			*
	ecords									Show 100 v records	

- 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)

Save Save and Close Sa		Copy Object Refre		Nocuments Forms	Discussion More	Toggle Tasks		Past Object	Previous Object	Next Object Last
21A* Benefits (Autho 21A Case 1065 - Ashby		_	nents Case History	Admin (Director and	Chief) Repayments					Created By: TE 4/8/2021 11:30
enefit Summary									.	Amend Ope
et Ordinary Benefit Amou 501.00	nt	Fuel Benefit + \$0.00	Amount		Total Payable Benefit An \$501.00 Spend Down (If > \$0)	mount				Send to Autho
Prior Approval					\$0.00				_	G
SO Benefits	7	/						🧷 🐚 S 🚡	∍ +	Notice of Determination
Month	ОВ	Fuel	Doctor	Medical	Hospital	Dental	Misc	Description		Notice of Inte
2/1/2021		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00		^	Letter
2/1/2021	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$250.00	Eye Glasses		Notice of Act
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			
Ad	d new row								-	
6 of 6 records								Show 100 V reco	• ords	
Repeat Benefit Row										

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.

■ WorkView			OnBase
Applications		(5) My Past Open Per	iods (VSO)
DVS MIS	~		
		PERIOD	CITY
FILTERS FOR DVS MIS	G	January 2021	Fairhaven
Q		February 2021	Fairhaven
FINANCIAL ASSISTANCE CASES	<u> </u>	February 2021	Plainfield
Search my VS-1 applications (VSO)	· 1	March 2021	Fairhaven
Search VS-1 applications (VSO)		March 2021	Plainfield
Search my VS-21A applications (VSO)			
Search VS-21A (VSO)			
My VS-21A with comments for review (VSC)		
My Pending VS-21A (VSO)			
My Active cases for renewal (VSO)			
VETERANS AND APPLICANTS	~		
Search all Persons			
Search all Veterans			
Search Veteran and Applicant Pairs			
PERIOD MANAGEMENT	~		
My Current Periods (VSO)			
✓ My Past Open Periods (VSO)			

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.

eriod X City - Janu	iary 2021 - Fa	airhaven								y: KMBS-DLESPER 2/2020 4:02:52 PM
Period									 Pre	eview VS5 Report
Period Name January 2021		art Date /1/2021	Quarter Q3		Fiscal Year FY2021					eview VS-6 Detail Report
City										(B)
City		VSO			Treasurer					Preview VS-6 Jummary Report
Fairhaven		DVS	S VSO		Treasurer				ſ	
Is Closed	Closure	Date	Closed By		VS5/6 Re	port			U	Close Period
Is Certified	Certifica	tion Date	Certified By		VS7 Repo	ort				
VSO 50%							<u>`</u>			
VSO 50%	VSO Review					<u>م</u>	Open periods for thi	45		
		Applicant Name		V	S-21A Date	G	Open periods for thi Period Name	5		
VS21A's requiring		Applicant Name		V		S		دی ری		
VS21A's requiring		Applicant Name		V			Period Name			
VS21A's requiring		Applicant Name		V			Period Name January 2021			
VS21A's requiring		Applicant Name		V			Period Name January 2021 February 2021			
VS21A's requiring		Applicant Name		V			Period Name January 2021 February 2021			
VS21A's requiring		Applicant Name					Period Name January 2021 February 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.

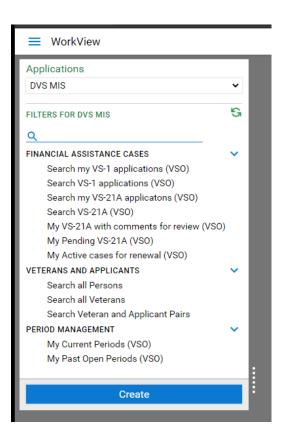
To view the report, double click on the report name.

Period X City - January 20; Period Period Name January 2021 City	Start Date	Quarter Q3	Fiscal Year FY2021			Preview VS5 Report
Period Name January 2021						Preview VS5 Report
January 2021						-
City						Preview VS-6 Detail Report
						Preview VS-6
City Fairhaven	D	0 VS VSO	Treasurer Treasurer			Summary Report
Is Closed	osure Date /28/2021	Closed By DVS VSO	VS5/6 Report	o for JANUARY 2021 - FAIRHAVE		
	ertification Date	Certified By	VS7 Report	101 JANUART 2021 - PAIRMAVE		
VSO 50%					- 1	
VS21A's requiring VSO Re	eview		5	Open periods for thi	G	
Case #	Applicant Name)	VS-21A Date	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

 \sim

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 V	eterans
Last Name buck*	=	NAME	DATE OF BI
First Name	=	Buck, Kenneth T.	
i not i vanie	_	Buckey, Lucky	3/10/198
SSN	=	Buckland, Betty	1/1/1970
		Buckley, Edward M	Л.
Date of Birth	=		
City	=		

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

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

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 exaple 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.

=			
	NAME	DATE OF BIRTH	CITY
-	Neumyer, Kenneth S	1/29/1971	Bosto
_	Nye, Pamela E	7/29/1971	Salen
=	Rowell, Michael P	8/10/1971	Bedfo
AND	_		
=			
	= AND	= Nye, Pamela E = Rowell, Michael P	Nye, Pamela E 7/29/1971 Rowell, Michael P 8/10/1971

WorkView Basics

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

Attributes		(863) Search a	II Veterans	
Last Name	=	NAME Cook, Thomas A	DATE OF BIRTH	CITY 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	Attlebore
		Corebia Ronald		

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

Save Save and Close	a Save and New	Delete	Copy Obj	ect Refr	resh	History
Veteran Detail Relat	ionships Rel	ated Items				
eteran - Cooper, Carl I						
Basic Info (this inform	ation was impor	rted from ar	nother syst	em)		
Last Name		First Name		М		Suffo
Cooper		Carl		L		
Cooper Full Name		Carl		L		
		Carl			ls Enable	
Full Name	Date of I		[d
Full Name Cooper, Carl L	Date of 1	Birth				.d
Full Name Cooper, Carl L SSN	2/21/1	Birth				

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

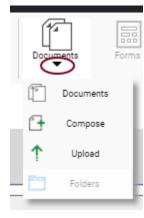
When viewing any individual item, you may have some options available to you. Depending on your permission, some of these buttons may be disabled.



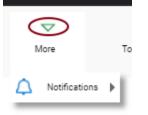
- Save save the item you are viewing.
- Save and Close save the current item and close the window.
- Save and New save the current item and create a new item of the same type.
- Delete delete the current item.
- Copy Object create a new item by copying the current item.
- Refresh reload the current item.



• 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	\bigtriangledown
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 ▼ 2005 0 Dec ¥ 0 Su Mo Tu We Th Fr Sa 27 29 30 1 2 28 3 4 5 6 7 8 9 10 13 12 11 14 15 16 17 24 18 19 20 21 22 23 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.

uty	
Marshfield	٩,

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 N	otes			ሬ 🚡 🕂 🕻	×
	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		

S Refresh – click this to refresh the list.

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

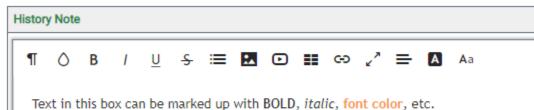
imes Delete – click this after selecting one or more rows in the filter to delete the selected items.

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

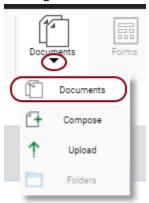
Some text attributes may allow you to apply special formatting to the text as seen here:



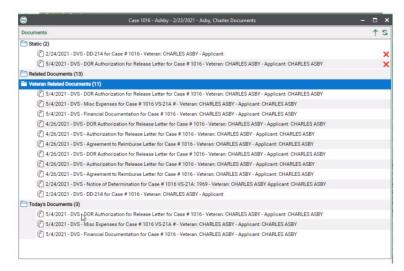
Documents

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

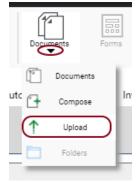
This folder will show documents created or imported on "today's date". These documents will remain in the folder for 24 hours then will no longer appear in this folder (as they do not meet the date criteria) but will be visible in the Related Documents and/or Veteran Related Documents folders. These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

Important notes:

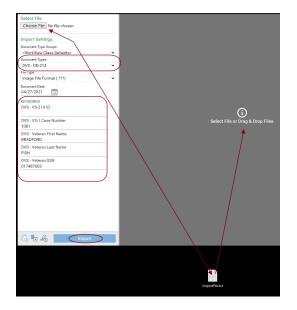
- You may find documents in more than one folder. For example, if documents for "Joe Veteran" are imported with his SSN they will appear in both the Related Documents and Veteran Related Documents folders.
- Related and Veteran Related Documents are related to "a thing (keyword/identifier) and exist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

×