



# VETERAN BENEFITS APPLICATION TRACKING SYSTEM USER GUIDE

For use with VBATS Redesign – Version 2.0.06  
(8/26/2024)

## VBATS

Improve your understanding of WDVA's improved Veteran Benefits Application Tracking System (VBATS) with this helpful guide.

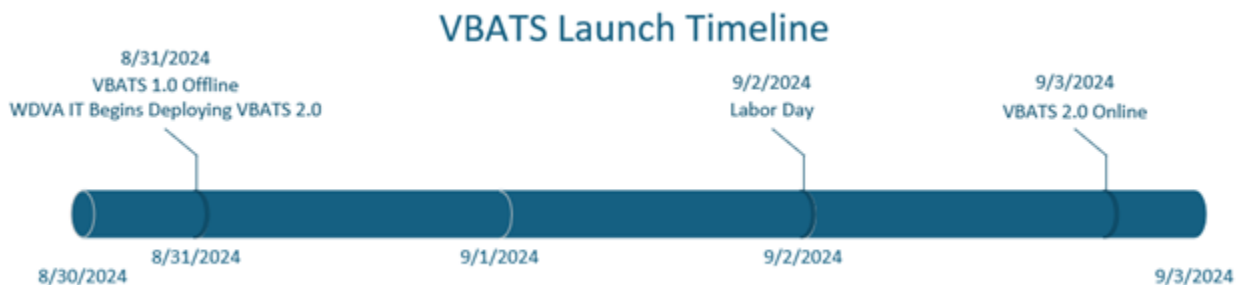
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## Accessing VBATS 2.0

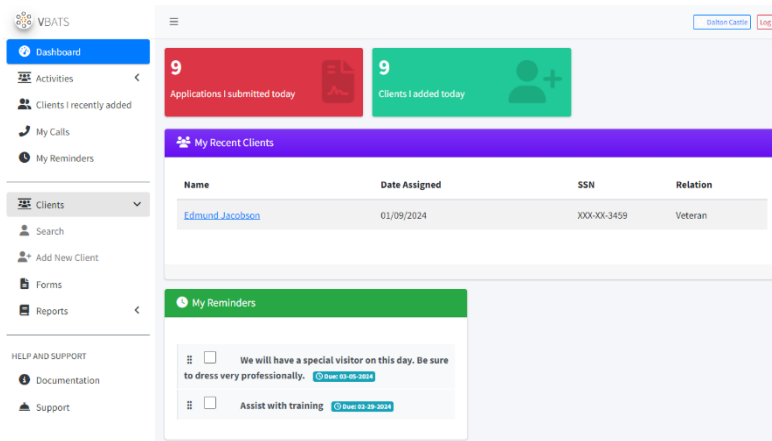
### VBATS 2.0 Deployment

1. **Friday, August 30th at 3:00 p.m.** the following existing applications will go offline to maintenance-mode, and be unavailable. Old VBATS 1.0 logins will no longer function. This is so we can begin the process of deploying VBATS 2.0. These applications will remain offline until Tuesday, September 3rd at 7:00 a.m.
  - VBATS
  - MyWisVets
2. **Tuesday, September 3rd by 7:00 a.m.** by that time you will receive an email from WDVA which will contain instructions to setup your new login to VBATS 2.0.
  - Your old VBATS 1.0 login will no longer be used. You will only use the newly created VBATS 2.0 login going forward.
  - Your VBATS 2.0 login ID will be your unique work email. **\*Note\*** Each user of VBATS 2.0 will need to have a unique work email that we have on file. Shared emails cannot be used.
3. Existing data, such as benefit applications, veteran/dependent data, and documentation, will migrate to the new VBATS 2.0 and be ready the first time you login.
4. To request access for a new CVSO or TVSO that has not had access previously, email your completed [Form WDVA 2419](#) to [SysDevRequest@dva.wisconsin.gov](mailto:SysDevRequest@dva.wisconsin.gov)
5. If you have issues while trying to setup the login or cannot see the email from WDVA, please email us at [mywisvets@dva.wisconsin.gov](mailto:mywisvets@dva.wisconsin.gov) or [sysdevrequest@dva.wisconsin.gov](mailto:sysdevrequest@dva.wisconsin.gov)

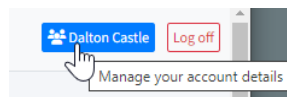


## Dashboard, User Control, & Permissions

When you first sign in, you will see a helpful dashboard with metrics, links to any veterans or dependents that you have recently added, as well as any Reminders you have set up.

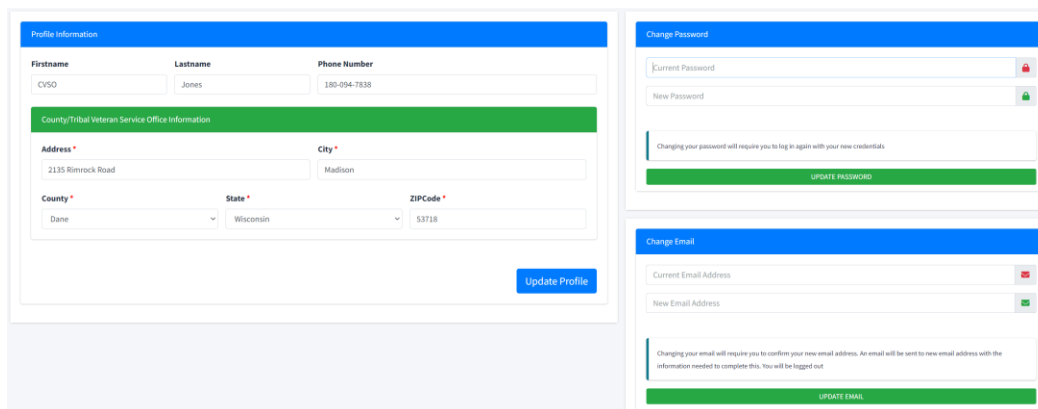


To manage your profile, click on your name in the upper right corner (next to the Log Off button).

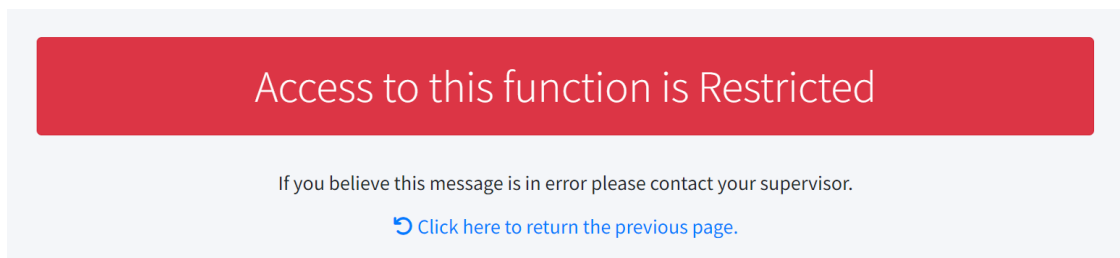


Here, you can edit your profile, and make changes to your personal contact information.

update your password, e-mail address,



Permissions in VBATS are structured to prevent users from accessing areas they do not have permissions over. If you ever see one of the below messages and you believe it appeared in error, please contact our [System Development Team](#).



## Side Navigation Bars

Two side navigation bars will help guide you through the site. One appears when you are inside of a veteran’s record and the other appears when you are using the rest of the site. At the bottom of both bars, you can find links to Documentation and Support. The top of each navigation bar will take you to the [Dashboard](#). Documentation will provide a link to the final version of this user guide. Clicking support will use your e-mail application to draft an e-mail to [sysdevrequest@dva.wisconsin.gov1](mailto:sysdevrequest@dva.wisconsin.gov1).

The image displays two side navigation bars for the VBATS system. Both bars feature the VBATS logo at the top and a 'Dalton Castle' header. The left bar is for the user interface, with a blue 'Dashboard' button highlighted. Below it are links for 'Clients I recently added', 'My Calls', and 'My Reminders'. A section titled 'HELP AND SUPPORT' contains links for 'Documentation' and 'Support'. The right bar is for a specific veteran's record, with a green 'Veteran' button highlighted. Below it are links for 'Applications', 'Discharge Documents', 'Documents', 'Family Members', 'Notes', 'Reminders', 'Calls', 'Email', 'Disability', 'Contacts', 'Claims', and 'NPRC Records Request'. A section titled 'HELP AND SUPPORT' contains links for 'Documentation' and 'Support'.

**Left Navigation Bar (User Interface):**

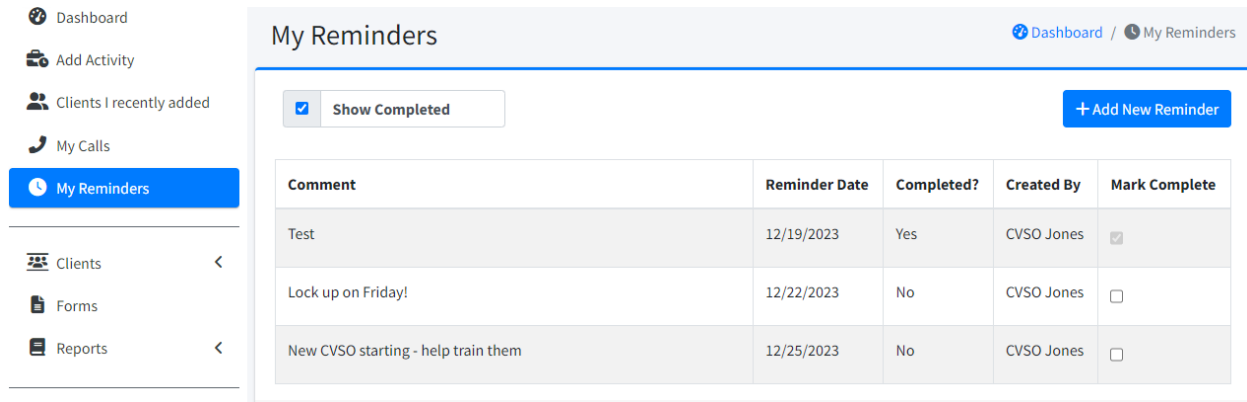
- VBATS
- Dalton Castle
- Dashboard
- Clients I recently added
- My Calls
- My Reminders
- Applications
- Client Search
- Forms
- Reports Dashboard **New**
- HELP AND SUPPORT
  - Documentation
  - Support

**Right Navigation Bar (Veteran Record):**

- VBATS
- Dalton Castle
- Dashboard
- Client Search
- Veteran
- Applications
- Discharge Documents
- Documents
- Family Members
- Notes
- Reminders
- Calls
- Email
- Disability
- Contacts
- Claims
- NPRC Records Request
- HELP AND SUPPORT
  - Documentation
  - Support

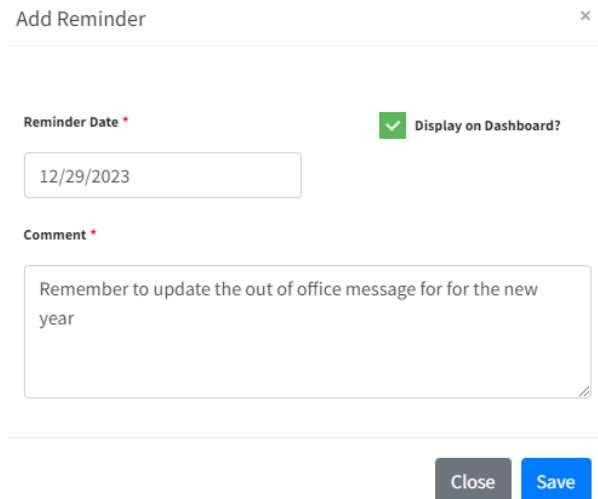
## Reminders

To add new Reminders, you can use My Reminders on the left navigation bar. In this window, clicking Show Completed will show your completed reminders. To add a new reminder, click Add New Reminder. If you have any reminders you would like to mark as completed, check the Mark Complete checkbox by them. You can also add Reminders [under a client profile](#).



Comment	Reminder Date	Completed?	Created By	Mark Complete
Test	12/19/2023	Yes	CVSO Jones	<input checked="" type="checkbox"/>
Lock up on Friday!	12/22/2023	No	CVSO Jones	<input type="checkbox"/>
New CVSO starting - help train them	12/25/2023	No	CVSO Jones	<input type="checkbox"/>

In the window that pops up when you click on Add New Reminder, you can check Display on Dashboard to make it show up on [the screen that appears when you first log in](#).



Add Reminder

Reminder Date \*

Display on Dashboard?

Comment \*

Close Save

## My Calls

You can access your call history by clicking on My Calls. This will let you see every call you have logged into the system, regardless of which veteran they are logged under. For more information on calls, look in the [Calls section](#).

The screenshot shows the 'My Calls' interface. On the left is a sidebar with navigation options: Dashboard, Add Activity, Clients I recently added, My Calls (highlighted in blue), My Reminders, Clients, Forms, and Reports. The main content area is titled 'Call History' and contains a table with three columns: Call Type, Call Date, and Note. The table lists three calls: a Voicemail on 12/20/2023, an Outgoing call on 12/19/2023, and an Incoming call on 12/19/2023. A mouse cursor is hovering over the 'Incoming' link, showing a 'Detail' tooltip.

Call Type	Call Date	Note
<a href="#">Voicemail</a>	12/20/2023	Voicemail - discussing issues with applications
<a href="#">Outgoing</a>	12/19/2023	Callback to talk about benefits
<a href="#">Incoming</a>	12/19/2023	Intake phone call

## Clients I recently added

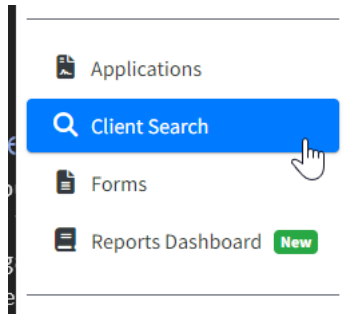
Clicking “Clients I recently added” will run the default client search looking for any users you have created in the last 24 hours. If the individual you are looking for does not show up, you can click on the “Recently Added (Last 24 Hours)” box to change your search criteria and do another search of the rest of the VBATS client database.

The screenshot shows the 'Client Account Search' interface. On the left is a sidebar with navigation options: Dashboard, Add Activity, Clients I recently added (highlighted in blue), My Calls, My Reminders, Clients, Forms, Reports, and CVSO Report. The main content area is titled 'Client Account Search' and includes a search bar with a dropdown menu set to 'I Recently Added (Last 24 Hours)'. Below the search bar is a legend: 'D = Veteran is deceased.' The search results are displayed in a table with columns: First Name, Last Name, SSN, DOB, Relation, and DD-214. The results show two entries: 'Someone Else' (DOB: 9/28/1989, Relation: Widow(er)) and 'Edward Testofferson' (DOB: 12/1/2023, Relation: Veteran, marked with a red 'D').

First Name	Last Name	SSN	DOB	Relation	DD-214
Someone	Else	XXX-XX-9634	9/28/1989	Widow(er)	
D Edward	Testofferson	XXX-XX-5789	12/1/2023	Veteran	

## Search for Clients

You *can* add a new Veteran directly by clicking Add New Client, but unless you know that the person isn't in VBATS yet, you should search for them first to save yourself from needing to enter their information again. VBATS accepts clients from several systems and, even if you have not worked with a veteran before, that does not mean they will not already be entered. To search for a client, first click Clients and then Search.



Clicking on the Last Name box will allow you to change what you are searching for. If you have multiple criteria you wish to search by, the second search box will allow you to refine your search by searching through the results for any phone numbers, dates of birth, SSNs, or partial names you type in. If a user has a DD-214, you can open it by clicking DD-214. Users you do not have permission to access have a cancel mark next to them and are not clickable. Clicking on a person's name will bring you into their profile.

Client Account Search Dashboard / Search Client Accounts

Last Name   **Refine your search further here!** ↓

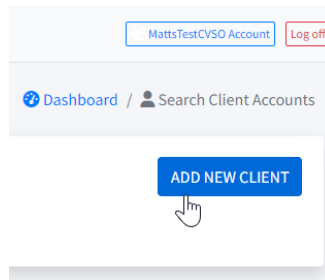
Search:

	Last Name	SSN	DOB	Relation	DD-214
Edward	Testofferson	XXX-XX-5789	12/1/2023	Veteran	
Gregory	Testman	XXX-XX-5364	12/4/2023	Veteran	
Test	Testerson	XXX-XX-3789	1/2/1958	Veteran	
Testy	Testofferson	XXX-XX-2959	11/5/2023	Spouse	
<input type="checkbox"/> ANewTest	ANewTest	XXX-XX-1111	1/1/1999	Veteran	
<input type="checkbox"/> Bob	Mctester	XXX-XX-1111	2/1/1980	Veteran	
<input type="checkbox"/> Edgar	Testman	XXX-XX-1111	9/27/1984	Veteran	
<input type="checkbox"/> Edgarina	Test	XXX-XX-1111	9/27/1989	Spouse	
<input type="checkbox"/> Matthew	KorboTest	XXX-XX-1111	8/8/1920	Veteran	
<input type="checkbox"/> SteveTest	SteveTest-hypen	XXX-XX-1111	1/5/1980	Veteran	
ADAM	TESTERMAN	XXX-XX-1111	10/8/1985	Veteran	444298



## Add a new Veteran

To add a new Veteran to VBATS, click Add New Client in the upper right corner of the Clients page.



Information marked with an asterisk is mandatory. When adding a new veteran or updating any veteran information that has a red exclamation mark appear next to it, a document must be added using the add document box at the bottom of the screen. Until a substantiating document is uploaded, you will not be able to save the veteran into VBATS.

A screenshot of the 'New Client' form. The form contains various input fields for personal information: First Name (Joe), Middle Name (P), Last Name (Hendry), Gender (Male), Suffix (Sr.), SSN (548-67-9845), Date of Birth (09/27/1972), Date of Death, Email Address (Joe.Hendry@dva.wi.gov), Home Phone (483-975-3489), Mobile Phone (438-597-1243), Claim Number, Street Address (525 Pitt Street), Street Address 2 (Apartment 5), City (Platteville), State (Wisconsin), Postal Code (53818), and County (Grant). There are also checkboxes for 'POA Filed', 'Housebound', 'Homeless', 'Incarcerated', and 'Deceased'. At the bottom, there is a section for 'File \*' and 'Document Type \*' with a 'Choose File' button and a dropdown menu. A red error message states: 'You are required to enter supporting documents for certain fields that have been changed'. A 'Save' button is located at the bottom right.

Please be aware that, if you check the Deceased box, you will need to fill in burial information before saving the new client.

Deceased

The client is marked as deceased. You will be required to enter burial information in order to proceed, and will be redirected to grave registration upon saving.

A screenshot of the 'Add Burial Information' form. It includes fields for 'County \*' (None/Unknown), 'Cremated' checkbox, 'Cemetery Name \*' (None/Unknown), 'Date of Interment' (mm/dd/yyyy), 'Unplatted' checkbox, 'Grave/Lot Number', 'Grave Section Number', 'Grave Block Number', 'Headstone Type' (Select One), and 'Place of Death'. 'Submit' and 'Cancel' buttons are at the bottom.

# Graves Registration

In the event a veteran is deceased, the Graves Registration area is enabled. In addition to the burial information page that shows up when you attempt to add a deceased veteran, you can add service history and Next of Kin information by clicking on the respective Add Military Service or Add Family Member buttons. Family members who have already been entered to the system through applications can also be designated as the Next of Kin on this page.

The screenshot shows the VBATS system interface for a user named CVSO Jones. The left sidebar contains navigation options: Dashboard, Veteran, Applications, Grave Registration (highlighted), Discharge Documents, Documents, Family Members, Notes, Reminders, Calls, Email, Disability, and Contacts. The main content area is divided into three sections:

- Military Service:** A table with columns Branch, Rank, and Character of Service. The entry shows Space Force, Cadet, and Honorable. A button "Add Military Service" is visible.
- Burial Information:** A table with columns County, Cemetery, Cremated, and Interment Date. The entry shows Not In Wisconsin, Unlisted, a checked box for Cremated, and 2023-12-19. A button "Edit Burial Information" is visible.
- Next of Kin:** A table with columns Name, Relationship, and Selected. The entry shows Someone Else, Widow(er), and a radio button. A button "Add Family Member" is visible.

The screenshot shows two overlapping forms: "Add Service History" and "Add Family Member".

**Add Service History Form:**

- Branch of Service: Space Force
- Rank: Cadet
- Entry Date: 12/18/2023
- Separation Date: 12/20/2023
- Service Period: Iraq War: Operation Iraqi Freedom or any successor -- Starting 19 Mar 2003
- Character of Service: Honorable
- Service Number: 1234567
- Name Used (if different from above): First Name, Middle Name, Last Name (empty fields)

**Add Family Member Form:**

- Is Federal/State/WDVA Employee?
- Apportioning Benefits
- First Name: Someone
- Last Name: Else
- Gender: Male
- SSN: 345-78-9634
- Date of Birth: 09/28/1989
- Home Phone: 543-645-6546
- Mobile Phone: 456-546-4565
- Email Address: Someone.else@someoneelse.dva.wi.gov
- Street Address: 588 Test Street
- Address (cont): Apt 23
- City: Platteville
- State: Wisconsin
- Postal Code: 53818
- County: Grant
- Relationship: Widow(er)
- Restrict to Administrator?
- POA on file?

## Applications

Applications can be accessed by clicking on Applications underneath the left navigation bar that comes up when you are accessing a client. Previous applications can be viewed here, and clicking on Add New Application will open a window where several different kinds of applications can be submitted.

Dalton Castle

Tokugawa Ieyasu - Veteran

Dashboard / Search Client Accounts / Tokugawa Ieyasu

Application History [Add New Application](#)

ID	Applicant	Type	Submitted On	Status	Last Updated On
716502	TOKUGAWA IEYASU	Wisconsin Veteran's Grant for Private Non-Profit Schools	2/22/2024	Eligibility Approved	2/22/2024
716493	TOKUGAWA IEYASU	DMV-Veterans Driver's License	2/15/2024	Initiated	2/15/2024
716492	TOKUGAWA IEYASU	Department of Revenue Eligibility	2/15/2024	Submitted	2/15/2024

Each link in the list will open a new version of the relevant application. Several of these application types did not exist as options for CVSOs or TVSOs to enter directly into the system in the previous iteration of VBATS.

Add New Benefit Application or Grant

- WisDOT Veteran Identifier
- DNR Game License Eligibility
- Wisconsin DVA - Veteran Education Grant
- Wisconsin DVA - Wisconsin G.I. Bill Application
- Property Tax Credit
- Pre-Registration for Cemetery Interment
- Health Care Aid
- Professional/Occupational Licensure Fee Waiver
- Wisconsin DVA - Subsistence Aid
- Wisconsin Veteran's Grant for Private Non-Profit Schools
- Veteran Homes
- Retraining Grant

Close

By using the required fields from earlier in the process, several applications are very brief and consist of selectors which allow you to pick between individuals who are eligible for a benefit. Once you hit save, it will submit these sorts of applications. For applications like the Veteran License Identifier, you can only apply for the veteran, so you need only enter the source of the application, verify their information is entered correctly, and identify your county before hitting **Save & Submit** to send it in to WDVA for processing. If you hit **Save Only**, the application will not be sent to WDVA until you reenter it to do so.

NEW APPLICATION  
Wisconsin Dept of Transportation - Veteran License Identifier

Applicant Tokugawa Ieyasu	Gender DOD	SSN 234-45-3423	Home Phone
DOD 1/2/1986		Email Address	Mobile Phone
Address 105 QUINN ST		City RIDGEWAY	State Wisconsin
			Zip 53582-0000

Please verify the applicant's basic information. If you need to change anything regarding the applicant, you must do so by [clicking here](#).

Veteran Base File #  
301687

Source of application  
CVSO/TVSO

CVSO County  
Dane

CANCEL SAVE ONLY SAVE & SUBMIT

Once you have submitted an application, you can view the application history at the bottom of the application page.

**Application History**

Show  entries

Event	On	By
Application Initiated	02/29/24 12:27 PM	Dalton Castle
Application Submitted	02/29/24 12:27 PM	Dalton Castle

Showing 1 to 2 of 2 entries

Previous **1** Next

**Application Status: Submitted**

[CANCEL](#)

[+ Add Application Note](#) [+ Send Notification](#)

Notes

- Added by: Dalton Castle on 02/29/24 12:28 PM [Edit](#) [Delete](#)  
EMAIL TO CVSO  
Sent an e-mail
- Added by: Dalton Castle on 02/29/24 12:27 PM [Edit](#) [Delete](#)  
CALL WITH CVSO  
Test

If you click on Add Application Note, you can add notes to the application.

Add New Application Note ✕

Enter a note regarding the application

Select a common subject if desired

DEPENDENT CALLED

**Subject**

DEPENDENT CALLED

The dependent called to inquire about how this application is going. I discussed this with them.

Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Semper auctor neque vitae tempus quam pellentesque nec nam. Consectetur libero id faucibus nisl tincidunt eget. Magnis dis parturient montes nascetur ridiculus mus. Ultrices vitae auctor eu augue ut lectus. Senectus et netus et malesuada fames ac turpis. Duis tristique sollicitudin nibh sit amet commodo nulla facilisi. Purus sit amet luctus venenatis lectus magna. Suspendisse in est ante in nibh mauris. Enim nunc faucibus a pellentesque sit amet porttitor eget. Ultrices dui sapien eget mi proin sed libero enim. laculis urna id volutpat lacus laoreet non curabitur gravida arcu. Nibh sit amet commodo nulla facilisi nullam vehicula. Ut etiam sit amet nisl purus in mollis. Pulvinar sapien et ligula ullamcorper malesuada proin libero nunc consequat. Morbi enim nunc faucibus a pellentesque sit.

[Save Note](#) [Cancel](#)

Other applications make use of a selector to allow you to choose a dependent or veteran applicant, with further questions for VBATS users to fill in additional information. If information about a veteran or spouse needs to be changed, there is a link you can click that will let you update their profile information rather than saving a new phone number or address just to one specific application.

**NEW APPLICATION**  
Application For Wisconsin G.I. Bill

Who is this application for?

Select an existing record or add a new one [here](#)

Name	Relationship	Selected
Joe Hendry	Veteran	<input type="radio"/>
Spousey McSpouseface	Spouse	<input checked="" type="radio"/>

**Applicant**  
Spousey McSpouseface  
**Gender** F    **Marital Status** Married    **SSN** 567-65-7657    **Home Phone**  
**DOB** 8/14/2024    **Email Address**    **Mobile Phone**  
**Address** 525 Pitt Street    **City** Platteville    **State** Wisconsin    **Zip** 53818  
Please verify the applicant's basic information. If you need to change anything regarding the applicant, you must do so by [clicking here](#).

**Dependent Applicant**  
Dependent is younger than 17 years old.

**Veteran Base File #** 1034236    **Source of application** -- Select One --    **CVSO County \*** Grant

**School Information**  
 -- Select One --  
 -- Select One --  
 Veteran - MyWisVets  
 Veteran - Email/Postal/Walk-in  
 CVSO/TVSO  
 School Veteran Certifying Official

Some applications have more fields that you will need to enter. The questions on these will usually mirror those on our paper applications.

**NEW APPLICATION**  
Wisconsin Dept of Veterans Affairs - Veteran Education Grant

**Applicant**  
Edmund Jacobson  
**Gender**    **DOB** 1/9/2024    **SSN** 438-57-3459    **Home Phone** 543-798-4377  
**Address** 585 Test Street    **City** Platteville    **State** Wisconsin    **Zip** 53818  
**Email Address** matt.riehaus@dva.wi.gov    **Mobile Phone** 457-985-7398  
Please verify the applicant's basic information. If you need to change anything regarding the applicant, you must do so by [clicking here](#).

**Veteran Base File #** 1752837    **Source of application** -- Select One --    **CVSO County** -- Select One --

**School Name**  
-- Select One --  
If school is not listed contact WDVA at 1-800-WIS-VETS (947-8387)

**Approximate Date that term, semester, or course started**  **Approximate Date that term, semester, or course ended**

**Member of the National Guard?**  
 Yes     No

**Member of the Reserves?**  
 Yes     No

**Degree prior to the start of the course(s)**    **Enrolled Credits (for this semester)**    **Estimated Reimbursement (for this semester)**  
 None          
 Associate  
 Bachelors  
 Post-Graduate

Form 2200

## Documents

Veteran documents can be accessed by clicking on the Documents tab. If you click Upload Document, you can upload a document to WDVA for review. You can also, if we have a DD-214 on file for the veteran, view a copy of the DD-214 by clicking on the three dots under Action.

The screenshot displays a web interface for managing documents. On the left is a navigation menu with the following items: Veteran, Applications, Discharge Documents, Documents (highlighted in green), Family Members, and Notes. The main content area is titled 'Documents' and features a '+ Upload Document' button in the top right corner. Below the title is a table with the following data:

File Name	Document Type	Date Uploaded	Action
Social Security Card	SSN	12/19/2023	
DD-214	DD-214	12/01/2010	<a href="#">View</a>

## Discharge Documents

While several document types can be added in the Documents tab, DD-214s and similar discharge documents require additional information to be added before they can be saved. These can be accessed in the Documents tab, but they also reside on their own in the Discharge Documents area alongside any data we have from Defense Manpower Data Decenter (DMDC). Unless you enter the necessary information, the document you choose **will not upload**.

Joe Hendry - Veteran

[Add Reminder](#) [Log call](#) [Send Email](#) [Dashboard](#) / [Search Client Accounts](#) / [Joe Hendry](#)

### Military Service Discharge Records

[+ Add New Discharge Document](#)

Branch	Pay Grade	Character of Service	Entry Date	Separation Date	Home of Record	
Army	E-1		8/2/2024	8/5/2024	WI	

Defense Manpower Data Center (DMDC)

(DMDC) DD-214

No DMDC DD214 data available.

### Add New Discharge Document

Discharge Type \* Choose a file \*

DD-214  King admission packet 071524.pdf

FirstName \* MiddleName LastName \* Date of Birth \*

Joe P Hendry 09/27/1972

Character of Service Branch of Service is Required \* Pay Grade Home of Record

-- Select One -- -- Select One -- -- Select One -- Wisconsin

Entry Date \* Separation Date \*

08/02/2024 08/05/2024

Enter Identifier(s) \*

**At least one is required**

Social Security Number DoD ID Service Number

548679845

Mailing Address

City State ZIP Code County

-- Select One --  -- Select One --

Primary MOS Secondary MOS TotalPriorService TotalForeignService

YMMM YMMM

[Upload Discharge](#)

## Family Members/Dependents

Adding Family Members can be done under the Veteran's Family members tab. Family members can be used in applicable applications after they have been added to this section of the site.

Name	Relation	SSN	DOB
<a href="#">Someone Else</a>	Widow(er)	345-78-9634	09/28/1989

When you first try to add a family member, you will be asked if they are also a veteran. If they are, this feature will allow you to link veteran families together while still allowing them to use their own benefits or, in the event one spouse has a higher level of disability and is thus eligible for a benefit the other spouse would not be eligible for on their own, to apply as a dependent even though they are a veteran themselves. Veteran dependents, spouses, and parents can be designated in VBATS.

Is this family member also a veteran?

Adding a non-veteran family member requires you to answer every question with an asterisk.

Add Family Member ×

Is Federal/State/WDVA Employee?  Apportioning Benefits

First Name \* Last Name \* Gender SSN \* Date of Birth \*

Home Phone Mobile Phone Email Address

Street Address \* Address (cont)

City \* State \* Postal Code \* County \*

Relationship \* **Save the family member**

Restrict to Administrator?  POA on file?



## Notes

Adding notes can be done via the Notes tab. If you do not have adequate permissions to see confidential notes, you will not be able to see their contents. You can edit or delete your own notes here, and if the veteran has any notes in their applications, you will also be able to see them here under Application Notes.

The screenshot shows a user interface for a veteran's profile. On the left is a navigation menu with options like Dashboard, Client Search, Veteran, Applications, Discharge Documents, Documents, Family Members, Notes (highlighted), Reminders, Calls, Email, Disability, Contacts, Claims, and NPRC Records Request. The main content area is titled 'Edmund Jacobson - Veteran' and includes buttons for 'Add Reminder', 'Log Call', and 'Send Email'. Below this is a 'Notes' section with an 'Add Note' button and a list of three notes. The first note is marked as confidential. Below the notes is an 'Application Notes' section with a scrollable list of notes, including one about a discharge document and another about evidence of service.

When inputting a note, if you check Mark as Confidential it will mark what you have entered as confidential, making it only accessible by certain WDVA users who have permissions to view it.

The 'Add Note' dialog box is shown. It has a title bar with 'Add Note' and a close button. Inside, there is a warning message: 'Marking a message as confidential will restrict access to its content.' Below this is a checkbox labeled 'Mark as Confidential?' which is checked. Underneath is a text area with the prompt 'Add text below \*' and a large text input field containing placeholder text. At the bottom right are 'Close' and 'Save' buttons.

## Client Reminders

Adding Reminders can be done directly on a client the Reminders tab. These reminders will appear on your reminders list and, if you check Display on Dashboard, the reminder will show up on your Dashboard. You can mark them as complete to remove them from this view and you can see completed items by checking the show completed box at the top. You can also add reminders from underneath the veteran's name.

The screenshot shows the 'Reminders' tab for a veteran. On the left is a sidebar with navigation options: Veteran, Applications, Grave Registration, Discharge Documents, Documents, Family Members, Notes, and Reminders (highlighted in green). The main area has a 'Show Completed' checkbox checked and a '+ Add New Reminder' button. Below is a table with the following data:

Comment	Reminder Date	Completed?	Created By	Mark Complete
Edward said he would get in contact with us somehow after he finishes with work on Thursday.	12/21/2023	No	CVSO Jones	<input type="checkbox"/>
Test	12/30/2023	Yes	CVSO Jones	<input checked="" type="checkbox"/>

Edward Testofferson - Veteran

Buttons: Add Reminder, Log call, Send Email

Add Reminder

Reminder Date \*

Display on Dashboard?

Comment \*

Save reminder here

Close Save

## Calls

Adding calls takes place in the Calls section of a veteran's profile. Click Add call to add a new call. You can also add a new call by clicking Log call under the veteran's name.

Call Type	Call Date	Note
<a href="#">Voicemail</a>	12/20/2023	Voicemail - discussing issues with applications
<a href="#">Outgoing</a>	12/19/2023	Callback to talk about benefits
<a href="#">Incoming</a>	12/19/2023	Intake phone call

### Edward Testofferson - Veteran

[Add Reminder](#) [Log call](#) [Send Email](#)

#### Add Call

**Call Date**

08/23/2023

**Call Type \***

Outgoing

**Phone Number**

555-555-5555

**Duration \* (mins)**

5

**Note \***

Quick call to inform the veteran their application has been processed

**Save your call here**

Close

Save

## E-Mail

E-Mails can be sent from within VBATS through the E-mails tab. The application will spoof your e-mail address when it sends, so anything you send through the application that receives a reply will go to your inbox. You can also send e-mail by clicking Send Email under the veteran's name.

Robert Bonachea

Michael Roberts - Veteran

Dashboard / Search Client Accounts / Michael Roberts

Dashboard / Add Activity

Veteran

Applications

Discharge Documents

Documents

Family Members

Notes

Reminders

Calls

Email

Send New Email

Subject	Recipient	Date Sent	Sender
Test	matt.niehaus@dva.wisconsin.gov	08/23/2023	Robert Bonachea

Edward Testofferson - Veteran

Add Reminder Log call Send Email

Add New Email

Sender robert.bonachea@dva.wisconsin.gov

Recipient \* CC

matt.niehaus@dva.wisconsin.gov

Subject \* BCC

This is a test e-mail

Message \*

Source Sans Pro

This is a test

Send the e-mail from here

Close Send Email

## Contacts

Contacts are anyone who might be connected to a veteran, but who might not qualify as a dependent for the purposes of applications. Contacts could be adult children assisting their parents, attorneys, friends, or any other possible individuals that would be useful to track.

Name	Home Phone	Email	County
<a href="#">Cody Cole</a>	438-574-3598	matt.niehaus@dva.wi.gov	Dane

### Add Contact

**First Name \***

**Last Name \***

**Home Phone**  **Mobile Phone**  **Email Address**

**Street Address**  **Street Address 2**

**City**  **State**  **Postal Code**  **County**

**Save Contact here**

## Claims & Records Requests

Though you cannot enter items in Claims or NPRC Records Request, you can view information on what WDVA staff have in process for these areas. The Claims area is used predominantly by our Milwaukee Claims Office.

Record Type	Requested From	Date Requested	Note
Service Records	Air Force	12/04/2023	Request placed with Air Force Office

## Forms

Forms can be used to download various Federal and Department forms.

Name	Download
WDVA 1037 - Veteran-Owned Business - Request for Certification	<a href="#">Download Form</a>
WDVA 1805 - Veterans Residency Affidavit	<a href="#">Download Form</a>
WDVA 2029 - School Application for Wisconsin GI Bill	<a href="#">Download Form</a>
WDVA 2030 - Request for Certification for Wisconsin GI Bill	<a href="#">Download Form</a>
WDVA 2059 - Request for Certification for Wisconsin Veteran Student Assistance Grant	<a href="#">Download Form</a>
WDVA 2096 - Service Connected Disability Verification Form	<a href="#">Download Form</a>
WDVA 2097 - Request for Certification for WI Veterans & Surviving Spouses Property Tax Credit	<a href="#">Download Form</a>

## Reports

Reports can be accessed through the Reporting Dashboard. As VBATS continues being improved upon, new reports will be added to this area. As it stands, the reports that you are able to access are the same as existed in the previous VBATS application.

The screenshot shows a web application interface. On the left is a navigation sidebar with the following items: 'Dashboard' (with a home icon), 'Clients I recently added' (with a person icon), 'My Calls' (with a phone icon), 'My Reminders' (with a clock icon), 'Applications' (with a document icon), 'Client Search' (with a magnifying glass icon), 'Forms' (with a document icon), and 'Reports Dashboard' (with a document icon, highlighted in blue, and a 'New' badge). Below the sidebar is the text 'HELP AND SUPPORT'. The main content area is titled 'Reporting Dashboard' and contains a section 'Reporting Links' with a sub-section 'CVSO Reports'. Under 'CVSO Reports', there are seven links: 'County Graves Report', 'Graves Registration Report', 'Applications by County Report', 'Benefits by County Report', 'Applications Initiated by County Report', 'Veteran Search Report', and 'DMDC DD214 Report'. A mouse cursor is pointing at the 'Reports Dashboard' link in the sidebar.