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.
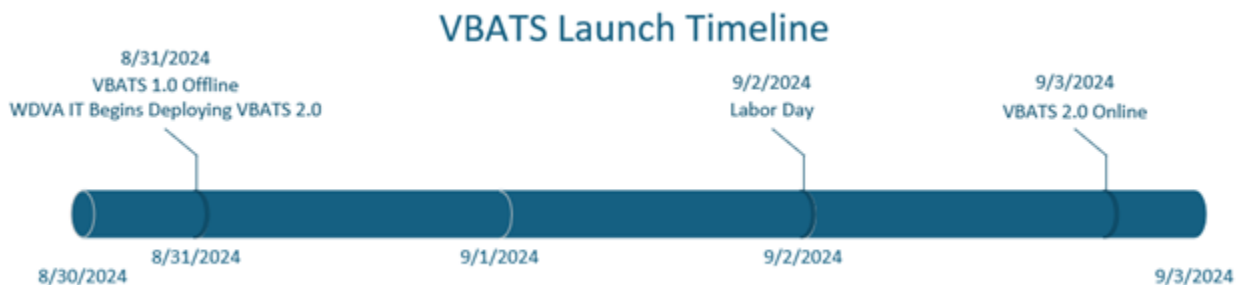
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VBATS 2.0 Deployment

1. **Friday, August 30***th* **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 3*rd* at 7:00 a.m.
   - VBATS
   - MyWisVets
2. **Tuesday, September 3***rd* **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
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 or sysdevrequest@dva.wisconsin.gov

VBATS Launch Timeline

8/31/2024		9/2/2024	9/3/2024
VBATS 1.0 Offline		Labor Day	VBATS 2.0 Online
WDVA IT Begins Deploying VBATS 2.0			

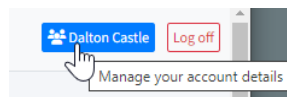| 8/30/2024	8/31/2024	9/1/2024	9/2/2024	9/3/2024

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.
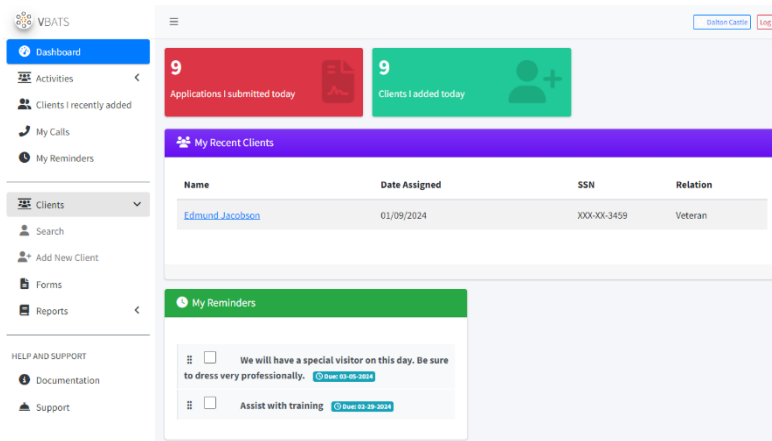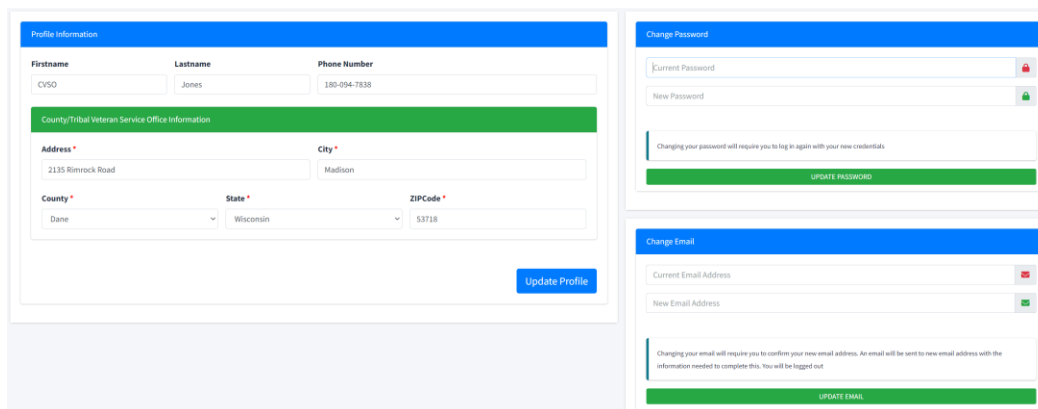

To manage your profile, click on your name in the upper right corner (next to the Log Off button).
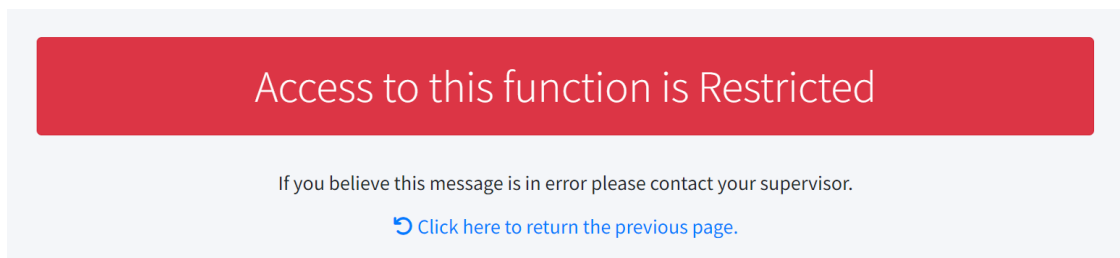

Here, you can edit your profile, update your password, e-mail address, and make changes to your personal contact information.

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.

Access to this function is Restricted

If you believe this message is in error please contact your supervisor.
↺ Click here to return the previous page.

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 .
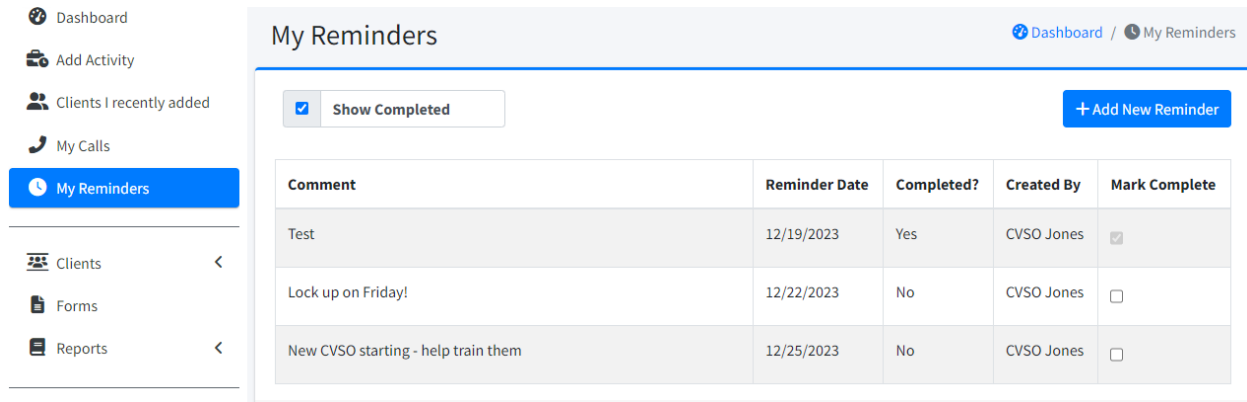
VBATS

Dalton Castle

- Dashboard
- Client Search

Veteran
- Applications
- Discharge Documents
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- Family Members
- Notes
- Reminders
- Calls
- Email
- Disability
- Contacts
- Claims
- NPRC Records Request

VBATS

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- Clients I recently added
- My Calls
- My Reminders

- Applications
- Client Search
- Forms
- Reports Dashboard New

HELP AND SUPPORT
- Documentation
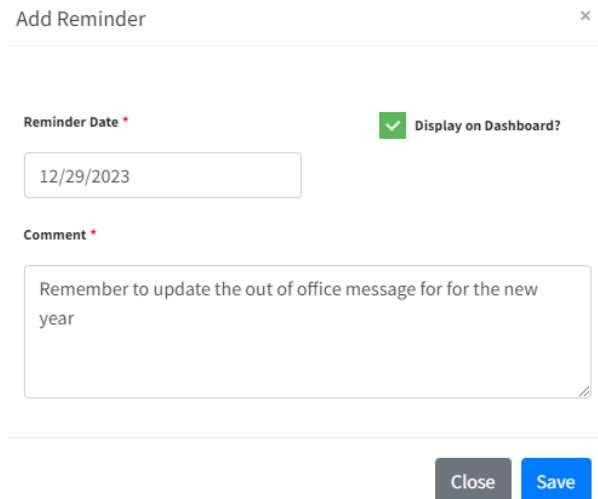- Support

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.

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.

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.

🎛 Dashboard		
💼 Add Activity		
👥 Clients I recently added		
📞 **My Calls**		
🕐 My Reminders		
👥 Clients ‹		
📄 Forms		
📖 Reports ‹		

Call History

Call Type	Call Date	Note	
Voicemail	12/20/2023	Voicemail - discussing issues with applications	⋮
Outgoing	12/19/2023	Callback to talk about benefits	⋮
Incoming	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 "I Recently Added (Last 24 Hours)" box to change your search criteria and do another search of the rest of the VBATS client database.

🎛 Dashboard		
💼 Add Activity		
👥 **Clients I recently added**		
📞 My Calls		
🕐 My Reminders		
👥 Clients ‹		
📄 Forms		
📖 Reports ⌄		
◯ CVSO Report		

Client Account Search

🌐 Dashboard / 👤 Search Client Accounts

[I Recently Added (Last 24 Hours) ⌄]   [Search Client Data........]   [🔍 Search]

D = Veteran is deceased.

	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.
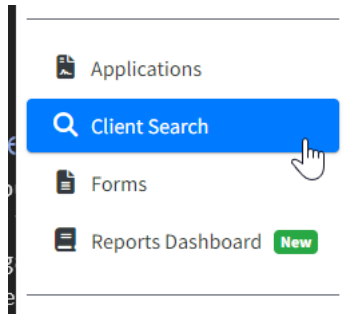
Clicking on the Last Name box will allow you to change what you are searching for. If you have multiple criteria you wish to search by, the second search box will allow you to refine your search by searching through the results for any phone numbers, dates of birth, SSNs, or partial names you type in. 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.

Add a new Veteran

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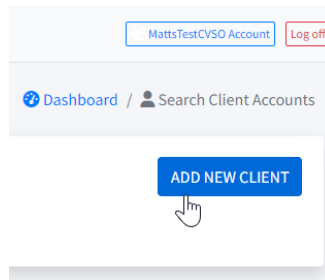
Information marked with an asterisk is mandatory. When adding a new veteran or updating any veteran information that has a red exclamation mark appear next to it, a document must be added using the add document box at the bottom of the screen. Until a substantiating document is uploaded, you will not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

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

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.

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.

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.

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.

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. Iaculis 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.

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

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.

	Documents			+ Upload Document
	File Name	**Document Type**	**Date Uploaded**	**Action**
	Social Security Card	SSN	12/19/2023	
	DD-214	DD-214	12/01/2010	⋮
				📄 View

Sidebar navigation:
- Veteran
- Applications
- Discharge Documents
- Documents
- Family Members
- Notes

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

DD-214

Branch	Pay Grade	Character of Service	Entry Date	Separation Date	Home of Record	
Army	E-1		8/2/2024	8/5/2024	WI	DD-214

Defense Manpower Data Center (DMDC)

(DMDC) DD-214

No DMDC DD214 data available.

Add New Discharge Document

Discharge Type *   **⬆ Choose a file ***
DD-214   Choose File   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**
                                                    YYMM   YYMM

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.

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.

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

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.

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.

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.

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.

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.

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.

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.

Forms

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

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.