

Organizational Development Search in TVB

These instructions can be used to ensure you are entering the necessary data within Tyler's Veterans Benefits (TVB) and generate reports you are authorized to provide to your Department's Headquarters when requested.

Data fields required to be entered into TVB

- Veteran's menu
 - First Name
 - Last Name
 - Email Address
 - Mobile Phone Number
 - Address
 - City
 - State
 - Zip
- Assignment
 - Field Office
 - Assigned To

Veteran Claim Military Service Contact and Dependent Medical Condition Document Communication Note Email Address Work Request Finance Employment Education Financial #

Veteran Info

First Name *	XXXXXXXX	VA File Number	
Middle Name		Service Number	
Last Name *	XXXXXXXX	Veteran Status *	Active
Suffix		Marital Status	Married
Preferred Name		Veteran Deceased	<input type="radio"/> Yes <input checked="" type="radio"/> No
SSN *	... - .. - XXXX <input type="checkbox"/> Show <input type="button" value="Copy"/>	Veteran Terminally Ill	<input type="radio"/> Yes <input type="radio"/> No
Date of Intake *	05/31/2022 <input type="button" value="Calendar"/> (mm/dd/yyyy)	Veteran Homeless	<input type="radio"/> Yes <input type="radio"/> No
Currently VA Employee	<input type="radio"/> Yes <input checked="" type="radio"/> No	Risk of Becoming Homeless	<input type="radio"/> Yes <input type="radio"/> No
Drivers License Number		Veteran Incarcerated	<input type="radio"/> Yes <input type="radio"/> No

Contact Info

Email	XXXXXX@AOL.net	Evening Phone		-		-		ext			
Mobile Phone	XXX	-	XXX	-	XXXX	Daytime Phone		-		ext	

Address	City	State	Zip	Country	County	Type	Active
890 fifth avenue	New York	New York	10001	United States		Main Residence	Yes

Assignment

Field Office *

-
- ☐ Quality Assurance
 - ☐ Field Operations
 - ☐ NCRBO
 - ☒ **National HDQRTS**
 - ☐ Puerto Rico

Assigned To

Hazell, Bradley

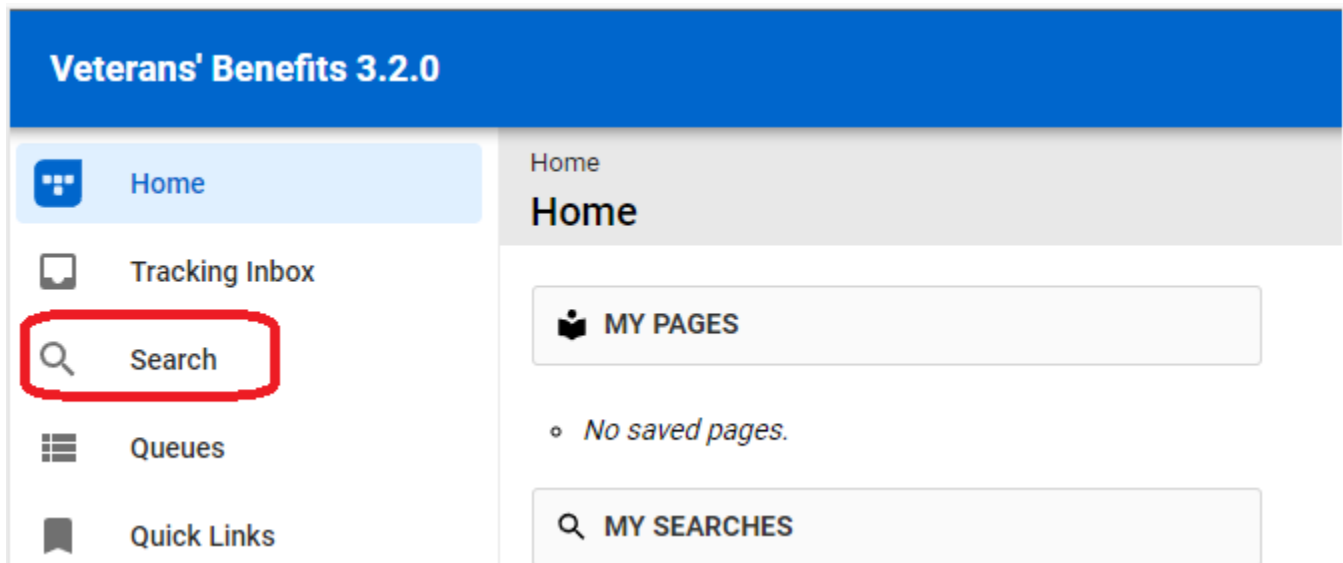
- Military Service menu
 - Branch of Service
 - Date Entered into Service
 - Date Separated from Service
 - Service Medal
 - Select “Other” and type VFW member eligible or device into text box.

The screenshot shows a 'Military Service' form. Red boxes highlight the following elements:

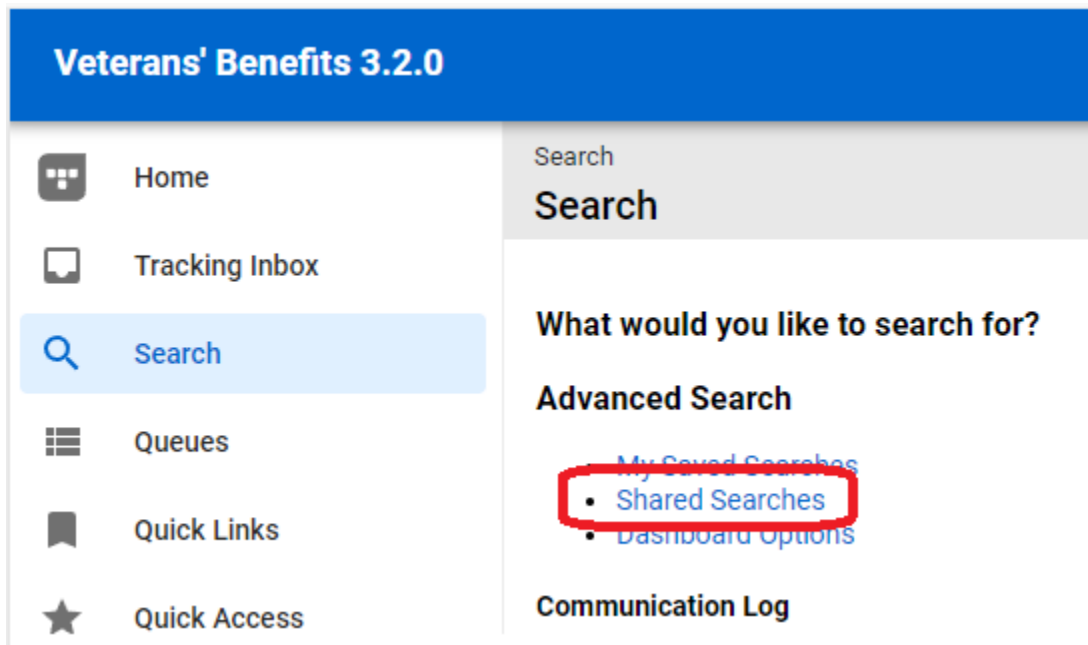
- The 'Military Service' tab at the top.
- The 'Military Service' label on the left side.
- The 'Service Type' dropdown menu, currently set to 'Active'.
- The 'Date Entered into Service' field, showing '04/11/2006' with a calendar icon and '(mm/dd/yyyy)' format.
- The 'Branch' dropdown menu, currently set to 'Marine Corps'.
- The 'Date Separated from Service' field, showing '05/11/2023' with a calendar icon and '(mm/dd/yyyy)' format.
- The 'Service Medal' section, where 'Other' is selected with a checkmark.
- The 'Other Service Medals' text box, containing the text 'VFW Member Eligible'.

Instructions to generate list of VFW Member Eligible Clients

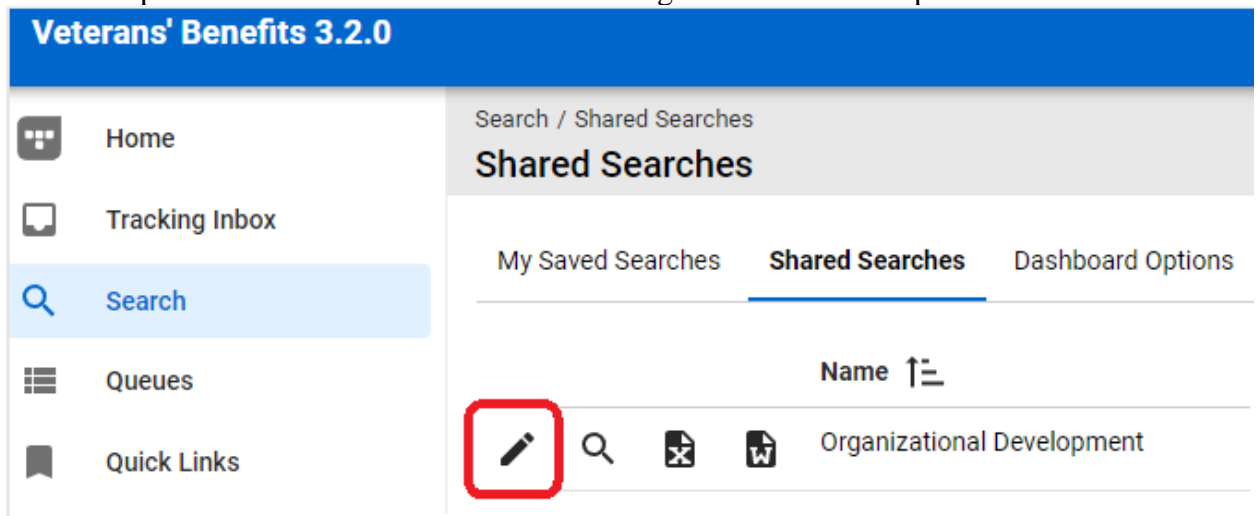
1. Select “Search” from the Main Menu column on the left side of the screen.



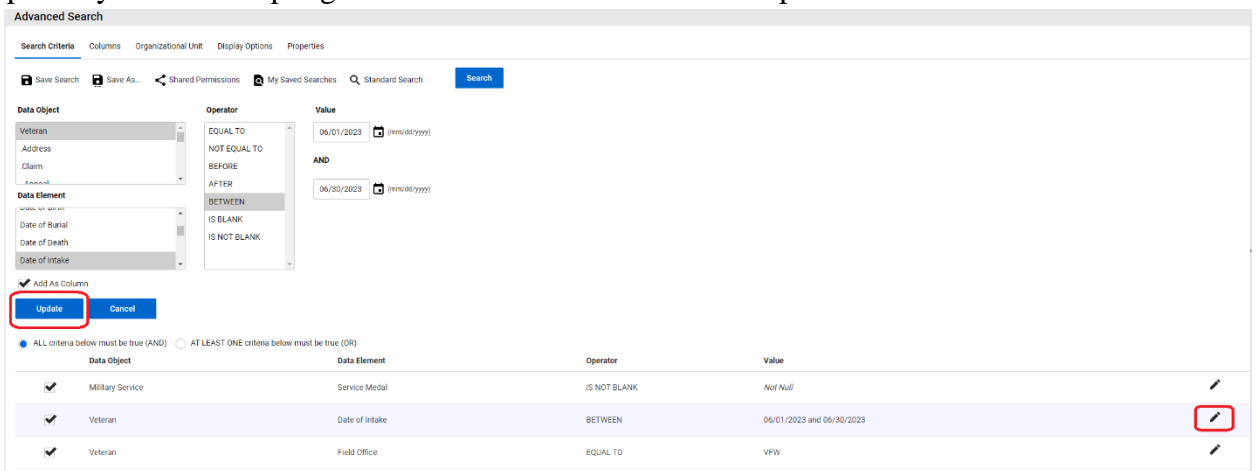
2. Select “Shared Searches”



3. Select the pencil icon / edit feature to the left of Organizational Development



4. Select the pencil icon to change the “Date of Intake” to modify the search for the time period you are attempting to retrieve data and then select “Update”.



5. Select the pencil icon to change the “Field Office” to your office and select “Update”.

Advanced Search

Search Criteria Columns Organizational Unit Display Options Properties

Save Search Save As... Shared Permissions My Saved Searches Standard Search Search

Data Object
Veteran
Address
Claim
Appeal

Data Element
Ethnicity
Evening Phone
Field Office

Operator
EQUAL TO
NOT EQUAL TO
CONTAINS ANY
DOES NOT CONTAIN
IS BLANK
IS NOT BLANK

Value
VFW

☒ Add As Column

Update **Cancel**

☒ ALL criteria below must be true (AND) ☐ AT LEAST ONE criteria below must be true (OR)

Data Object	Data Element	Operator	Value	
<input checked="" type="checkbox"/> Military Service	Service Medal	IS NOT BLANK	Not Null	
<input checked="" type="checkbox"/> Veteran	Date of Intake	BETWEEN	06/01/2023 and 06/30/2023	
<input checked="" type="checkbox"/> Veteran	Field Office	EQUAL TO	VFW	

6. Select “Save As”

Search / My Saved Searches / Organizational Development (Veteran)

Advanced Search

Search Criteria Columns Organizational Unit Display Options Properties

Save Search **Save As...** Shared Permissions My Saved Searches Standard Search Search

Data Object
Veteran
.Address
.Claim
Appeal

Operator

Value

7. Add your preferred search Name, Title, and Description and select “Save”

Save As...

Name

VFW Member Eligible Report

Title

HDRTS July 2023

Description

Advanced search of new clients for KC HDQRTS who are eligible to become VFW members

Save












Close

8. You may now run the search or export the search to an Excell Spreadsheet or Word Document by selecting the appropriate icon.

Search / My Saved Searches

My Saved Searches

My Saved Searches Shared Searches Dashboard Options

	Name 	Data Object 	Description 
   	Organizational Development	Veteran	Advanced search for Membership eligibility
   	VFW Member Eligible Report	Veteran	Advanced search which shows new clients for the month of July 2023 who are eligible to become VFW members