

Memorial Benefits Management System

Eligibility Office Automation Capability / Manual Pre-Need

Requirements Specification Document



Department of Veterans Affairs

October 2014

Version 3.1 (Interim)

Revision History

Note: The revision history cycle begins once changes or enhancements are requested after the Requirements Specification Document has been baselined.

Date	Version	Description	Author
11/7/14	3.1	Interim version contains reviewer feedback. Updated sections include: 1. Introduction (subsections 1.2, 1.3, and 1.4). 2. Overall Description, subsection 2.6 (US002.1, US013.1); subsection 2.10 and 2.11. Appendix A, context diagram, and Appendix B is formatted to begin collaboration discussions. All changes are shaded yellow to ease review; shading will be removed prior to publication.	SRA International, Inc.
10/24/14	3.0	Initial version of RSD in conjunction with MBMS BOSS Enterprise Enhancements scope of work.	SRA International, Inc.
8/14/2014	2.0	This version has been base-lined and the PDF version will be signed	NCA, OI&T PD

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1. Introduction

This Requirements Specification Document (RSD) captures the functional and technical requirements for remediating and enhancing the Eligibility Office Automation (EOA) system. This system falls under the Memorial Benefits Management System (MBMS) initiative. The information provided in this RSD serves as input to application design and development.

The Burial Operations Support System (BOSS) provides benefit delivery support to National Cemetery facilities nationwide. In the spring of 2013, the Eligibility Office Automation system was implemented as part of BOSS enterprise. EOA automates the manual, paper-intensive record keeping, information and forms processing associated with determining eligibility for "Time of Need" interments, and the manual input and management of Pre-Need Burial cases.

Under the 2014-2015 MBMS Program, EOA will be modified to provide much needed enhancements that will facilitate greater and better use of the EOA system. EOA Capability/Manual Pre-Need enhancements will support the business functions of the Eligibility Office by providing features for faster eligibility determination, case management tracking, improved reporting, and capability to process Pre-Need cases and associate them with Time-of-Need cases.

1.1. Purpose

This document outlines the scope and level of effort involved for implementing the changes and enhancements requested for the Eligibility Office Automation Capability/Manual Pre-Need project and is intended for use by the Office of Information and Technology (OIT) to implement enhancements, and defect remediation leading to greater and better use of the EOA system.

1.2. Scope

The scope for this application is characterized in the MBMS BOSS Enterprise Enhancements PWS as the delivery of critical enhancements to the production BOSS Eligibility Office Automation system, providing features for faster eligibility determination, tracking of eligibility case history, automated creation of essential case documents and faxes, improvement to overall case management, enhanced reporting accuracy, and improved information access rights.

The scope of the EOA project will allow enhanced system functionality for Time of Need and Manual Pre-Need application processing. The overarching enhancements, as enumerated in EOA RSD v2.0 are listed below.

- Provide a case management feature along with associated caseload reporting.
- Modify the system to allow the user to record electronic requests sent to other organizations as an alternative to sending faxes.
- Provide various improvements to the screen navigation, formatting, field values and searches throughout the system.
- Allow capability to record a Time of Need case as being/not being eligible.
- Allow the Verification of Military Service form to be generated on demand with current data.

- Allow the Eligibility Coordination form to generate an automatic journal entry when it's approved.
- Allow for records in any BOSS case status to populate the Sensitive Case Advisory.
- Provide various improvements to the system reports.
- **Improve the exchange of data between BOSS and EOAS.**
- **Analyze how configuration and design enhancements will affect downstream eBenefits portal/interface exchange (see PreNeed US025.0).**

Details around this capability are further specified in the Functional Requirements section and Appendices A and B of this document.

1.3. Scope Exclusion

- Enhancements to PreNeed eBenefits Portal/Interface exchange.

1.4. References

Other relevant documents that provide input to application features and business requirements are noted below.

- [EOA/Manual Pre-Need Business Requirements Document \(FY14\)](#)
- [EOA Requirements Specification Document](#)
- [EOAS User Guide](#)

2. Overall Description

This section describe the general factors that affect the EOA system and its specifications. The sub-sections that follow provide additional background and detail.

2.1. Accessibility Specifications

All specification take into account VA 508 Accessibility standards. AS part of the FY14 Acquisition Strategy, product support and development management will ensure 508 compliance of EOA application and any future enhancement of the EOA application.

2.2. Business Rules Specification

Applicable business rules are detailed in the requirements section of this document.

2.3. Design Constraints Specification

Design constraints for the MBMS Web Burial Schedule application are listed below.

- EOA application design is constrained by the technical standards, tools and guidelines approved by VA and identified in the One-VA TRM.

- Further analysis during the development phase may impact the design specification of the system and will be noted in an update to this section.

2.4. Disaster Recovery Specification

As noted in EOA RSD v2.0, BOSS/AMAS support documentation is maintained by DCO Staff and includes a Disaster Recovery Plan. The BOSS/AMAS Information System Contingency Plan is coordinated with the Continuity of Operations Plan, Incident Response Plan, and Disaster Recovery Plan, and calls for coordination with other entities that provide support to the LAN, such as DCO and VA-NSOC.

EOA falls within the purview of the QITC COOP and disaster recover operational plan. This RSD does not constrain, change, or impose further requirements in this regard.

2.5. Documentation Specifications

Implementation of these enhancements for EOA/Pre-Need Capability will comply with existing PMAS policies and ProPath templates. As specified in the MBMS BOSS Enterprise Enhancements PWS, the MBMS EOA project requires the following documentation deliverables.

Table 2-1: EOA Documentation Requirements

Document	Description
EOAS & Pre-Need User Guide	The existing EOAS & Pre-Need User Guide will be updated to reflect the changes made to the application.
Online BOSS User Guide	The existing Online BOSS User Guide will be updated to reflect the changes made to the application.

2.6. Functional Specifications

The functional specifications for this application, as documented in EOA RSD v2.0 are listed below. Operational characteristics and additional business rules are further specified in the Appendix A, Use Case Context Diagram and Appendix B, Use Case Specifications.

2.6.1. Time of Need Processing

User stories are written from the perspective of the users of the system. The following functional specifications pertain to the EOA Time-of-Need System.

US001.0 – EOAS Case Management Accessibility per Eligibility Office Supervisor Role and Associated Authorities

As an Eligibility Office Supervisor, I need to be able reassign all cases in the Case Management System in order to manage the workload.

Table 2-2: US001.0 Requirement Elaboration

BN#	BN1: EOS User Roles and Authorities
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OWNER#s	NA
Business Goal	The system shall be modified to allow for an Eligibility Office Supervisor to be able to have access to reassign all cases in Case Management System.
Feature Capability	User Roles, Access, and Rights
Constraints	None Identified
Acceptance Criteria	Eligibility Office Supervisors shall be able to reassign all cases in the Case Management System.

US001.1 – Case Management Accessibility per Eligibility Case Manager Role and Associated Authorities

As an Eligibility Case Manager, I need to be able to view all cases assigned to me—without being able to assign cases—in the Case Management System so that I can manage my personal workload and maintain the integrity of the system.

Table 2-3: US001.1 Requirements Elaboration

BN#	BN1: EOS User Roles and Authorities
OWNER#s	NA
Business Goal	The system shall be modified to allow for an Eligibility Case Manager to be able to view their own cases in the Case Management System.
Feature Capability	User Roles, Access, and Rights
Constraints	Do not grant access rights to Eligibility Case Managers to reassign cases in the Case Management System. Do not grant access rights to Eligibility Case Managers to execute case management workload reports for any other Case Manager other than themselves.
Acceptance Criteria	In the Case Management System, Eligibility Case Managers shall be able to view cases assigned to them without being able to perform the following. <ul style="list-style-type: none"> ▪ Cannot reassign cases in the case management system. ▪ Cannot execute case management workload reports for anyone other than themselves.

US001.2 – EOAS Case Management Accessibility per Scheduling Agent/Call Center Lead Role and Associated Authorities

As a Scheduling Agent/Call Center Lead, I need read-only access to Pre-Need cases—without accessing Time-of-Need cases—in the Case Management System so that I can respond to callers. Additionally, I should be able to submit a Verification of Military Service (VMS) form.

Table 2-4: US001.2 Requirements Elaboration

BN#	BN1: EOS User Roles and Authorities
OWNER#s	NA
Business Goal	The system shall be modified to allow a Scheduling Agent/Call Center Lead to have read-only access to Pre-Need Cases, No access to Time of Need cases and Submit a VMS in the EOAS Case Management System.
Feature Capability	User Roles, Access, and Rights
Constraints	None Identified
Acceptance Criteria	A Scheduling Agent/Call Center Lead shall have read-only access to Pre-Need cases in the EOAS Case Management System. They shall not have access rights for the following to Time of Need cases. Additionally, they shall be able to submit a VMS form.

US001.3 – EOAS Case Management Accessibility per Cemetery User and Associated Authorities

As a Cemetery User I need to process Sensitive Case Advisory (SCA) special cases and submit a VMS for Eligibility Processing.

Table 2-5: US001.3 Requirements Elaboration

BN#	BN1: EOS User Roles and Authorities
OWNER#s	NA
Business Goal	The system shall be modified to allow for User Role of Cemetery User to be able to have access to Sensitive Case Advisory processing and Submit a VMS in the EOAS Case Management System.
Feature Capability	User Roles, Access, and Rights
Constraints	None Identified
Acceptance Criteria	Cemetery Users shall be able to process SCAs and submit a VMS.

US002.0 – Eligibility Case Assignment and Reassignment as an Eligibility Office Supervisor

As an Eligibility Office Supervisor, I need to assign and reassign eligibility cases to Eligibility Case Managers in order to manage their workloads and increase office efficiency.

Table 2-6: US002.0 Requirements Elaboration

BN#	BN2 Add EOA Case Management Feature
OWNER#s	2.1, 2.3, 2.4

Business Goal	The system shall log any assignment and reassignment as an UPDATE to the case Journal.
Feature Capability	System Enhancement
Constraints	Cannot change history of case assignments.
Acceptance Criteria	Eligibility Office Supervisors shall be able to assign and reassign cases by USERID and Name of Eligibility Case Managers without changing history of case assignments.

US002.1 – Eligibility Office Supervisor and Eligibility Case Manager View Case History

As an Eligibility Office Supervisor or Eligibility Case Manager, I need to be able to view the history of actions (Added, Updated, Closed, and Reassigned) that have been performed on an Eligibility Case and the name of the user who performed those actions in order to manage case timeliness.

Table 2-7: US002.1 Requirements Elaboration

BN#	BN2 Add EOA Case Management Feature
OWNR#s	2.2, 2.3, 2.4, 2.5
Business Goal	The system shall have the ability to be able to view the history of actions (Added, Updated, Closed, and Reassigned).
Feature Capability	System Enhancement
Constraints	Cases can be viewed, re-assigned, modified, added, updated and closed only by the Eligibility Office Supervisor and/or the assigned Eligibility Case Manager.

Acceptance Criteria	<p>Eligibility Office Supervisors and Eligibility Case Managers shall be able to view all cases and see that they are tagged as follows in the Journal entries of the cases.</p> <ul style="list-style-type: none"> ▪ ADDED: When a user adds an Eligibility Case, the system shall tag that case record as ADDED and record USERID and name of the user who added the case. ▪ OPENED: When a user opens an Eligibility Case, the system shall tag that case record as OPENED and record USERID and name of the user who opened the case. ▪ UPDATED: When a user updates an Eligibility Case, the system shall tag that case record as UPDATED and record USERID and name of the user who updated the case. ▪ CLOSED: When a user closes an Eligibility Case, the system shall tag that case record as CLOSED and record USERID and name of the user who closed the case. ▪ REASSIGNED: When an Eligibility Officer Supervisor reassigns a case, the system shall tag that case record as REASSIGNED and record USERID and name of the user who added the case. <p>In addition, the system shall display a history for each updated case. Also, Eligibility Case Managers shall NOT be able to change case assignments. Only Eligibility Site Supervisor can change assignments. Any Eligibility Case Manager should be able to pull up that case and update in the event that primary owner is not available, e.g. OOO. They CANNOT reassign the case to themselves.</p>
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US002.2 – Eligibility Office Supervisor and Eligibility Case Manager Caseload Timeliness Reports Management

As either an Eligibility Office Supervisor or an Eligibility Case Manager, I need to generate a report for any selected period of dates that provides a status of caseload aging so that I may more effectively manage the office and manager caseload.

Table 2-8: US002.2 Requirements Elaboration

BN#	BN2 Add EOA Case Management Feature
OWNER#s	2.6, 2.7, 2.8
Business Goals	<ul style="list-style-type: none"> ▪ Case Aging should be able to select any calendar timeframe and report the number of cases added, closed, cases pending (worked but not added or completed). ▪ Calendar timeframe should be able to select a minimum of a 1 day. ▪ Caseload Aging reporting can be generated by assigned Eligibility Case Manager or the Eligibility Office Supervisor.
Feature Capability	Reporting
Constraints	Eligibility Case Managers cannot view Caseload Aging Reports for other Eligibility Case Managers.

Acceptance Criteria	<ul style="list-style-type: none"> ▪ For each case state, all system users can generate a report of their own cases for a single day, monthly totals, and annual totals. ▪ Eligibility Case Manager shall be able to generate a Caseload Aging Report for cases that have been assigned to them only. ▪ Eligibility Case Managers shall not be able to view Caseload Aging Reports for other Eligibility Case Managers.
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US002.3 – Add USERID’s for All Existing Reports

As either Eligibility Office Supervisor or an Eligibility Case Manager, I need to be able to view the USERID on all existing reports so that I can identify who is working a case.

Table 2-9: US002.3 Requirements Elaboration

BN#	BN2 Add EOA Case Management Feature
OWNER#s	2.9
Business Goals	<p>The system shall add USERID’s to existing reports:</p> <ul style="list-style-type: none"> ▪ Pending by Organization ▪ Pending Over 48 Hours ▪ Timeliness by Organization ▪ Timeliness by Case
Feature Capability	Reporting, System Enhancement
Constraints	None Identified
Acceptance Criteria	All users can view USERID’s for all reports.

US003.0 – Do Not Let an EOA Case Leave Its Queue without Being Assigned

As either an Eligibility Office Supervisor or an Eligibility Case Manager, I should not be able to select a case from Process a New Case without updating it. Upon exiting the case, I need to be given the option to return the case to the queue or assign it to myself.

Table 2-10: US003.0 Requirements Elaboration

BN#	BN3: Prevent an EOA Time of Need Case from Leaving its Queue without Being Assigned
OWNER#s	3.1, 3.2
Business Goals	<p>The system should be able to give the option to the user to be able to:</p> <ul style="list-style-type: none"> ▪ Return the case to the queue ▪ Assign the case to her/himself <p>On the EOAS menu, move the Open Case button away from the Process New Case button, preferably to the bottom of the menu.</p>
Feature Capability	System Enhancement

Constraints	All EOA users must not be allowed to leave Time of Need cases unassigned.
Acceptance Criteria	<ul style="list-style-type: none"> ▪ All cases in the case management system shall have one of the following statuses: Added, Pending, or Closed. ▪ If a user exits a case without accepting assignment of it or returning it to the queue, an error message shall display. ▪ If user exits a case without working on it, the system shall prompt the user either to return the case to the queue or assign the case to her/himself. ▪ On the EOAS menu, the Open Case button shall display at the bottom of the menu.

US004.0 – Enable Search of Open Case with USERID of Last Person

As an either Eligibility Office Supervisor or an Eligibility Case Manager, I need to be able to search for cases in the system by using the “USERID” of the person who last updated or was assigned to the case.

Table 2-11: US004.0 Requirements Elaboration

BN#	BN4: Enable Open Case Feature to Search Using USERID of the Last Person Assigned to the Case
OWNER#s	NA
Business Goals	The system menu screen shall be modified for the “Open Case” feature to include search capability using the “USERID” of the last person to update the case (CCR2151).
Feature Capability	System Enhancement
Constraints	None Identified
Acceptance Criteria	<ul style="list-style-type: none"> ▪ The system menu shall include search capability for the “Open Case” feature. ▪ All users shall be able to search open cases in the system using USERID of Last Person as a filter for the person who last updated or was assigned to a case.

US005.0 – Let Eligibility Office Supervisor Review Unassigned Cases in System Queue

As an Eligibility Office Supervisor, I need to review unassigned cases in the system queue in order to assess the scope of pending work and manage workload.

Table 2-12: US005.0 Requirements Elaboration

BN#	BN5: Allow Eligibility Office Supervisor to Review Unassigned Cases
OWNER#s	NA

Business Goals	The system shall allow the Eligibility Office Supervisor to review the unassigned cases in the system queue
Feature Capability	System Enhancement
Constraints	Only the Supervisor can view all unassigned cases.
Acceptance Criteria	The Eligibility Office Supervisor shall be able to review all unassigned cases in the system queue.

US006.0 – Automatically Pre-populate Veteran Data on Veterans Information Screen

As either an Eligibility Office Supervisor or Eligibility Case Manager, I need to see automatically pre-populated Veterans data on the Veterans Information screen to prevent re-entry of the information.

Table 2-13: US006.0 Requirements Elaboration

BN#	BN6: Correct/Improve System for VMS Functionality
OWNR#s	6.1
Business Goals	The system shall automatically prepopulate Date of Birth, Date of Death, and all available data on Veteran Information Screens.
Feature Capability	System Enhancement, Data Quality
Constraints	None Identified
Acceptance Criteria	Eligibility Office Supervisors and Eligibility Case Managers shall be able to see the following pre-populated Veteran data on all Veteran Information screens: Date of Birth, Date of Death, all available data.

US006.1 – Pre-populate Veteran and Veteran Decedent Data

As either an Eligibility Office Supervisor or an Eligibility Case Manager, I need to see automatically pre-populated Veterans and Veterans' decedent's data on the VMS input screens to prevent re-entry of the information.

Table 2-14: US006.1 Requirements Elaboration

BN#	BN6: Correct/Improve System for VMS Functionality
OWNR#s	6.2, 6.3
Business Goals	<ul style="list-style-type: none"> ▪ The EOAS system shall pre-populate the Veteran fields with Veteran data on the VMS input screens (Decedent's screen). ▪ The EOAS system shall pre-populate the Decedent fields with Decedent data on the VMS input screens.
Feature Capability	System Enhancement
Constraints	None Identified

Acceptance Criteria	From VMS input screens, Eligibility Office Supervisors and Eligibility Case Managers shall be able to view Veteran fields pre-populated with Veteran data and Decedent fields pre-populated with Veteran decedents' data.
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US006.2 – Generate VMS on Demand

As either an Eligibility Office Supervisor or an Eligibility Case Manager working on the Journal screen, I need to generate a VMS with current data on-demand without creating a new EOAS report so that I can see all current information in one place.

Table 2-15: US006.2 Requirements Elaboration

BN#	BN6: Correct/Improve System for VMS Functionality
OWNER#s	6.4
Business Goals	The system shall allow for the VMS to be generated on demand at any time from the journal screen for viewing purposes with the current data without doing a Submit action.
Feature Capability	System Enhancement
Constraints	None Identified
Acceptance Criteria	<p>Eligibility Office Supervisors and Eligibility Case Managers shall be able to perform the following tasks.</p> <ul style="list-style-type: none"> ▪ From the Journal screen, generate a VMS on-demand. ▪ View the VMS populated with current data without having to generate a new report.

US006.3 – VMS Modifications

As either an Eligibility Office Supervisor or an Eligibility Case Manager, I need correct information with which to determine selections for the VMS form and the VMS Preview screen so that I can generate the form with accurate information.

Table 2-16: US006.3 Requirements Elaboration

BN#	BN6: Correct/Improve System for VMS Functionality
OWNER#s	6.5, 6.6, 6.7
Business Goals	<ul style="list-style-type: none"> ▪ On the VMS output form, rename the field currently entitled "Sex (M/F)" to display as "Gender". ▪ On the VMS Preview screen, rename the Save button to display as Submit. ▪ To the Organization drop-down menu located on the Contact Information screen, add several new options. ▪ For the Race field, include a Hispanic selection.
Feature Capability	System Enhancement, Bug Fix

Constraints	None Identified
Acceptance Criteria	<p>Eligibility Office Supervisors and Eligibility Case Managers can see the following changes to VMS functionality.</p> <ul style="list-style-type: none"> ▪ On the VMS output form, a Gender field might display. ▪ On the VMS form, a Hispanic option displays in the Race field. ▪ On the VMS Preview screen, a Submit button should have replaced a Save button. ▪ On the Contact Information screen, the Organization drop-down menu shall offer the following options: <ul style="list-style-type: none"> ○ NPRC ○ RMC ○ 391 ○ Microfilm ○ Merchant Marines

US007.0 – Add “Sent To” Journal Entry (for Electronic Requests in Addition to Fax Requests) and for Reporting Purposes

As either an Eligibility Office Supervisor or an Eligibility Case Manager working on the Journal Entry screen, I need to be able to indicate that a request was sent electronically in lieu of generating a fax request for reporting purposes.

Table 2-17: US007.0 Requirements Elaboration

BN#	BN7: Improve System for Journal Functionality
OWNER#s	7.1, 7.2, 7.3
Business Goals	The system shall allow an option of “Sent To”
Feature Capability	System Enhancement, Reporting
Constraints	None
Acceptance Criteria	<p>Eligibility Office Supervisors and Eligibility Case Managers shall be able to use a Sent To option in lieu of generating a fax request and select the following entry fields.</p> <ul style="list-style-type: none"> ▪ “Type of Delivery” – required ▪ “Remarks” – optional <p>In addition, the system shall log Sent To information similar to fax generation—for the purpose of reporting in both the Pending by Org Report and the Timeliness by Org Report.</p>

US007.1 – Modifications for Manual Journal Entries

As either an Eligibility Office Supervisor or an Eligibility Case Manager, I need to be able to view and select modifications made for manual journal entries to record reasons for a case being eligible, not just ineligible, and show ADMIN DECISION/MEMORANDUM selection.

Table 2-18: US007.1 Requirements Elaboration

BN#	BN7: Improve System for Journal Functionality
OWNER#s	7.4, 7.5
Business Goals	<p>For manual journal entries the system shall be modified as follows.</p> <ul style="list-style-type: none"> ▪ Add values for the Showing field entitled "Discharge Under Honorable Conditions" and "Discharge General (Under Honorable Conditions)". ▪ In the Type of Document field, rename "ADMIN DECISION" to "ADMIN DECISION/MEMORANDUM".
Feature Capability	System Enhancement, Bug Fix
Constraints	None Identified
Acceptance Criteria	<ul style="list-style-type: none"> ▪ For manual journal entries, Eligibility Office Supervisors and an Eligibility Case Managers shall be able to view and select two new values in the Showing field: <ul style="list-style-type: none"> ○ Discharge Under Honorable Conditions ○ Discharge General (Under Honorable Conditions) ▪ In the Type of Document field of manual journal entries, an option entitled ADMIN DECISION/MEMORANDUM might display instead of ADMIN DECISION.

US007.2 – Modify Military Data Tab

As either an Eligibility Office Supervisor or an Eligibility Case Manager, I need to be able to view all military data sent from BOSS—even if some military service fields are blank. Also, for accuracy, military service periods shall not be allowed to overlap.

Table 2-19: US007.2 Requirements Elaboration

BN#	BN7: Improve System for Journal Functionality
OWNER#s	7.6, 7.7
Business Goals	<ul style="list-style-type: none"> ▪ The EOAS system shall allow Military branch to be displayed on the Journal Military tab when no additional military data is available. ▪ The EOAS system shall not allow military date periods to overlap when there are multiple periods of service on the military data tab.
Feature Capability	System Enhancement, Bug Fix
Constraints	None Identified
Acceptance Criteria	<p>For manual journal entries, Eligibility Office Supervisors and Eligibility Case Managers should be able to verify the following.</p> <ul style="list-style-type: none"> ▪ When no additional military data is available, military branch displays on the Journal Military tab. ▪ When there are multiple periods of service on the Military Data tab, military date periods do not overlap.

US007.3 – Modify “Organizations” Drop-Down Menu

As either an Eligibility Office Supervisor or an Eligibility Case Manager, I should be able to view and select modifications made in the Organizations drop-down list so that I can accurately record from where the request originated.

Table 2-20: US007.3 Requirements Elaboration

BN#	BN7: Improve System for Journal Functionality
OWNER#s	7.8
Business Goals	Modify the EOAS system’s “Organizations” drop-down menu to include: “State Cemetery”, “MPS”, “MIAP”, and “Other”.
Feature Capability	System Enhancement
Constraints	None Identified
Acceptance Criteria	From the Organizations drop-down menu, Eligibility Office Supervisors and Eligibility Case Managers shall be able to view and select the following new options. <ul style="list-style-type: none">▪ State Cemetery▪ MPS▪ MIAP▪ Other

US007.4 – Record Eligibility Time of Need Case as “Y”/”N” When Case Is Closed

As either an Eligibility Office Supervisor or an Eligibility Case Manager, I need to be able to record a “Y” or “N” outcome for eligibility when a Time of Need case is closed.

Table 2-21: US007.4 Requirements Elaboration

BN#	BN7: Improve System for Journal Functionality
OWNER#s	7.9
Business Goals	Provide ability to record the Time of Need (not Pre-Need) case as “Y”/”N” for eligibility when case is closed.
Feature Capability	System Enhancement
Constraints	None Identified
Acceptance Criteria	Upon closing a case, Eligibility Office Supervisors and Eligibility Case Managers shall be required to enter one of the following options. <ul style="list-style-type: none">▪ Y if a case is eligible▪ N if a case is not eligible

US007.5 – Ability to Enter Eligibility Denied Reason & Codes for Time of Need Cases

As either an Eligibility Office Supervisor or an Eligibility Case Manager, I need to be able to mark a case as “N” when eligibility is denied and select an Eligibility Denied Reason Code so that I can capture statistics regarding reasons why cases are recorded as ineligible.

Table 2-22: US007.5 Requirements Elaboration

BN#	BN7: Improve System for Journal Functionality
OWNR#s	7.10
Business Goals	Provide ability to deny eligibility on Time of Need cases and select an Eligibility Denied Reason Code.
Feature Capability	System Enhancement
Constraints	None Identified
Acceptance Criteria	<p>When Eligibility Office Supervisors and Eligibility Case Managers are closing an eligibility case that has been denied, they shall be able to select one of the following codes to indicate why eligibility is denied.</p> <ul style="list-style-type: none"> ▪ 1 DVA ▪ 2 ACDUTRNG ▪ 3 Less than 24 Months ▪ 4 Reserve/Guard Time ▪ 5 No Military Service ▪ 6 Merchant Marine ▪ 7 Non-US Citizen ▪ 8 Adult Dependent Child ▪ 9 Not Legal Spouse ▪ 10 MIAP ▪ 11 State Cemetery ▪ 12 MPS ▪ 13 Academy Attendee ▪ 14 Oregon State Hospital ▪ 15 Voided Enlistment ▪ 20 MIAP-DVA ▪ 21 MIAP-ACDUTRNG ▪ 22 MIAP-Less Than 24 Months ▪ 23 MIAP-Reserve/Guard Time ▪ 24 MIAP-No Military Service ▪ 25- MIAP-Merchant Marine ▪ 26 MIAP-Non-US Citizen ▪ 27 MIAP-Adult Dependent Child ▪ 28 MIAP-Not Legal Spouse ▪ 29 MIAP-Academy Attendee

US008.0 – Improve ECF Approval in EOA Time of Need System

As either an Eligibility Office Supervisor or an Eligibility Case Manager, I need to be able to approve an Eligibility Coordination Form, record ECF approval in a Journal entry, and print the ECF-approval signature in such a way that it does not print on a separate page when there is space for it on the previous page.

Table 2-23: US008.0 Requirements Elaboration

BN#	BN8: Improve System for ECF Functionality
OWNR#s	8.1, 8.3, 8.4
Business Goals	<ul style="list-style-type: none">▪ Provide capability for the ECF to be approved.▪ Automatically generate a Journal entry when the ECF is approved.▪ Modified the system so that an ECF-approval signature does not print on a separate page when there is space for it on the previous page.
Feature Capability	System Enhancement, Bug Fix
Constraints	None Identified
Acceptance Criteria	<ul style="list-style-type: none">▪ Eligibility Office Supervisors and Eligibility Case Managers shall be able to approve an ECF and when they do, the system shall log the approval in a Journal entry.▪ As well, they should be able to print the ECF-approval signature so that it does not print on a separate page when there is space for it on the previous page.

US008.1 – Modify ECF GUI

As either an Eligibility Office Supervisor or an Eligibility Case Manager, I need to be able to view the entire ECF on the screen so that I can take action clearly when selecting a button to approve the case.

Table 2-24: US008.1 Requirements Elaboration

BN#	BN8: Improve System for ECF Functionality
OWNR#s	8.2, 8.5
Business Goals	<ul style="list-style-type: none">▪ On the ECF Preview screen, change the name of the Previous button to display as: Approve.▪ Correct the on-screen display of the ECF 'Veteran Information' section which is now shifted out of margin to the left side.
Feature Capability	System Enhancement, Bug Fix
Constraints	None Identified

Acceptance Criteria	<ul style="list-style-type: none"> ▪ From the ECF Preview screen, Eligibility Office Supervisors and Eligibility Case Managers shall be able to see that an Approve button has replaced the Previous button and can be clicked to approve an ECF. ▪ As well, from ECF's on-screen display, the Veteran Information section might display within page margins.
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US009.0 – Rename Duplicate Record Check Process in EOA Time of Need System

As either an Eligibility Office Supervisor or an Eligibility Case Manager, I need to verify that the button that appears during the duplicate record check process is renamed as “New” instead of "Accept" in two places so that it is clear when I am creating a new case.

Table 2-25: US009.0 Requirements Elaboration

BN#	BN9: Improve System Navigation
OWNER#s	9.1
Rank	Various (see individual OWNER#s)
Business Goals	<p>Rename the button that appears during the duplicate-record-check process to “New” instead of "Accept". Make this change in the two places where the button occurs during the duplicate record check process.</p> <ul style="list-style-type: none"> ▪ When a Time of Need case is created/established (manually) in EOAS ▪ When a Time of Need case is created from a record being transferred in from BOSS
Feature Capability	Bug Fix
Constraints	None Identified
Acceptance Criteria	<p>When Eligibility Office Supervisors and Eligibility Case Managers are checking duplicate records, they might see that the Accept button has replaced the New button in two places.</p> <ul style="list-style-type: none"> ▪ When a Time of Need case is created/established (manually) in EOAS. ▪ When a Time of Need case is created from a record being transferred in from BOSS.

US010.0 – Enhance the Interface between BOSS and EOAS

As either an Eligibility Office Supervisor or an Eligibility Case Manager, I need the system to send a notification to the Eligibility Office (EO) when a Scheduler from the National Cemetery Scheduling Office (NCSO) schedules a burial that has a pending eligibility case. As a Scheduler, I need to be able to query BOSS by social security number (SSN) for Veteran or decedent so that I can determine if a case exists in EOAS. Finally at time of need, I need to be able to associate the Time of Need case with a pending case in EOAS and know that the BOSS History screen updates automatically to indicate that the case is in the Eligibility Office.

Table 2-26: US010.0 Requirements Elaboration

BN#	BN10: Enhance the Interface between BOSS and EOAS
OWNER#s	10.1, 10.2, 10.3
Business Goals	<ul style="list-style-type: none"> ▪ The system shall generate a notification to the Eligibility Office if the NCSO scheduler schedules a burial when the Eligibility Office has a pending eligibility case. ▪ The system shall provide the ability to tell that a case exists in the EOAS system, if a user queries the BOSS system by SSN for a decedent or Veteran and allow the user to associate the two cases. ▪ The system shall allow that any case created in EOAS must have the ability to be associated with a BOSS Time of Need case, at which point the BOSS History screen should be updated to indicate that the case is in the Eligibility Office.
Feature Capability	System Enhancement
Constraints	
Acceptance Criteria	<p>Eligibility Office Supervisors and Eligibility Case Managers might perform the following tasks.</p> <ul style="list-style-type: none"> ▪ Confirm that the system has sent a notification to the Eligibility Office if the Scheduler for NCSO schedules a burial for which the Eligibility Office has a pending eligibility case. ▪ Associate the pending eligibility case with the BOSS Time of Need case. ▪ From the BOSS History screen, see that the case is in the Eligibility Office. <p>Also, NCSO Schedulers might be able to query the BOSS system using SSN for a Veteran or decedent to determine that their case exists in EOAS.</p>

US011.0 – Modify Sensitive Case Advisory Forms

As a Cemetery User, Eligibility Office Supervisor, or Eligibility Case Manager, I need to see the Eligibility Office case number on top of the SCA form as well as allow the SCA to be populated with BOSS records in any case status (not just eligible records) so that I can prepare a request for special burial accommodation. Lastly, when all data is displayed on the SCA form, I need to see auto-populated text as well as manually entered text in all capital letters so that I can produce a request with consistent fonts.

Table 2-27: US011.0 Requirements Elaboration

BN#	BN11: Modify EOAS for the SCA
OWNER#s	11.1, 11.2, 11.3, 11.4

Business Goals	<ul style="list-style-type: none"> ▪ Auto-populate the EO case number on the top of the SCA form. ▪ Enable BOSS records in any case status to be populated on the SCA, not just eligible records. ▪ Display auto-populated information as well as manually entered text in all capital letters when all data is presented on the form. ▪ Allow cemetery users to access SCA processing but no other portion of the EOAS system.
Feature Capability	System Enhancement; User Roles, Access, Rights
Constraints	Cemetery users will have access only to SCA processing but to no other portion of the EOAS system.
Acceptance Criteria	<p>Cemetery Users, Eligibility Office Supervisors, and Eligibility Case Managers should see the following on SCA forms:</p> <ul style="list-style-type: none"> ▪ An auto-populated EO case number on top of the form ▪ BOSS records (in any case status) ▪ Auto-populated information in all capital letters when all data is presented on the form ▪ Manually-entered text in all capital letters when all data is presented on the form <p>Also, Cemetery Users should be able to access SCA processing but no other portions of EOAS.</p>

US012.0 – Provide “Timeliness by Case” Report for Any Selected Time Frame

As either an Eligibility Office Supervisor or Eligibility Case Manager, I need to generate a Timeliness by Case Report that lists closed cases for a selected time frame and sorts the display by Case Number or USERID so that I can have accurate counts and can view accounts by USERID for case management purposes.

Table 2-28: US012.0 Requirements Elaboration

BN#	BN12: Enhance System for Reporting
OWNR#s	12.1, 12.4, 12.6
Business Goals	<ul style="list-style-type: none"> ▪ Modify the system so that “Timeliness by Case” report cases appear on the report if the cases were closed anytime during a selected timeframe. ▪ Allow the display of reports to be sorted by Case Number or USERID. ▪ Add Case Management reports to the system.
Feature Capability	Reporting
Constraints	None Identified

Acceptance Criteria	<p>Eligibility Office Supervisors and Eligibility Case Managers shall be able to select a timeframe, generate a Timeliness by Case Report, and see the following.</p> <ul style="list-style-type: none"> ▪ Eligibility cases that were closed during the selected time frame and sorted according to the selected option. ▪ Any Case Management reports for the selected time frame. ▪ An option to sort case counts in the display by Case number or USERID.
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US012.1 – Provide “Closed Time of Need Cases” Report for Any Selected Time Frame

As an, Eligibility Office Supervisor, or Eligibility Case Manager, I need to view a report of closed Time of Need cases that lists counts of eligible and denied cases (for any selected time frame) and be able to sort the display by Case Number or USERID so that I can report on eligibility statistics.

Table 2-29: US012.1 Requirements Elaboration

BN#	BN12: New Statistical Report—Enhance System for Reporting
OWNR#s	12.7, 12.4, 12.6
Business Goals	<ul style="list-style-type: none"> ▪ Provide a new “Closed Time of Need Cases” Report that shows statistical counts of eligible and denied cases for any selected timeframe. Display counts of denied cases by reason code and reason legend. ▪ Optionally, allow counts to be broken down further by USERID. ▪ Add Case Management reports to the system.
Feature Capability	Reporting
Constraints	None Identified
Acceptance Criteria	Eligibility Office Supervisors and an Eligibility Case Managers shall be able to select a timeframe and generate a Closed Time of Need Cases Report that lists counts of eligible and denied cases for the selected timeframe as well as denied-case counts by reason code and reason legend. Also, the report display shall provide an option to sort case counts listed by Case number or USERID.

US012.2 – Replace “Decedent ID” with Cases’ Current USERID

As either an Eligibility Office Supervisor or Eligibility Case Manager, I need to see that the Decedent ID has been replaced with the cases’ current USERID on the Pending Over 48 Hours Reports, Pending by Organization Reports, Timeliness by Case Reports, and the Timeliness by Organization Reports so that I can determine which Case Manager has or had a case.

Table 2-30: US012.2 Requirements Elaboration

BN#	BN12: Enhance System for Reporting
OWNR#s	12.3, 12.2, 12.4, 12.6
Business Goals	<ul style="list-style-type: none"> ▪ For the following reports, replace the “Decedent ID” with the cases’ current USERID: <ul style="list-style-type: none"> ○ Pending Over 48 Hours ○ Pending by Organization ○ Timeliness by Case ○ Timeliness by Organization ▪ Allow the reports to be sorted by Case Number or USERID. ▪ Add Case Management reports to the system. ▪ Add an EOAS Case Number column to the “Pending Over 48 Hours” report.
Feature Capability	Reporting
Constraints	None Identified
Acceptance Criteria	<p>Eligibility Office Supervisors and Eligibility Case Managers shall be able to view any of the following reports and see that the USERID of the assigned Case Manager replaces Decedent ID.</p> <ul style="list-style-type: none"> ▪ Pending Over 48 Hours ▪ Pending by Organization ▪ Timeliness by Case ▪ Timeliness by Organization <p>Eligibility Office Supervisors and Eligibility Case Managers shall be able to sort these report displays by Case Number or USERID.</p> <p>Eligibility Office Supervisors and an Eligibility Case Managers shall be able to view the Pending Over 48 Hours Report and see a populated EOAS Case Number column.</p>

US012.3 – Add “Sent to” Journal Information for Reporting Purposes

As either an Eligibility Office Supervisor or an Eligibility Case Manager, I need to see “Sent to” information on reports so that I have an accurate accounting of both pending electronic requests and fax requests sent to other agencies.

Table 2-31: US012.3 Requirements Elaboration

BN#	BN12: Enhance System for Reporting
OWNR#s	12.5, 12.4, 12.6
Business Goals	<ul style="list-style-type: none"> ▪ Consider “Sent to” journal information in the same respect as generated Fax Sheets for the purpose of reporting in both the Pending by Org Report and the Timeliness by Org Report. ▪ Sort reports by Case Number or USERID.

Feature Capability	Reporting
Constraints	None Identified
Acceptance Criteria	<ul style="list-style-type: none"> ▪ Eligibility Office Supervisors and Eligibility Case Managers shall be able to view “Sent To” journal information in both Pending by Org Reports and Timeliness by Org Reports. ▪ Eligibility Office Supervisors and Eligibility Case Managers shall be able to sort Pending by Org reports and Timeliness by Org reports by Case Number or USERID.

US013.0 – Modify BOSS so that Relationship Code Is Not Changed to “NR” When “First” Interment Deemed Eligible

As either an Eligibility Office Supervisor or an Eligibility Case Manager, I need to process all subsequent cases without delay when the first interment is deemed eligible.

Table 2-32: US013.0 Requirements Elaboration

BN#	BN13: BOSS Processing Associated with EOAS
OWNER#s	13.1
Business Goals	Modify the BOSS system so that “subsequent cases” do not have their relationship code changed to “NR” (Not Related) when the “first” interment is deemed eligible.
Feature Capability	System Enhancement
Constraints	None Identified
Acceptance Criteria	When a first interment is deemed eligible, Eligibility Office Supervisors and Eligibility Case Managers shall be able to process subsequent cases without delay and expect that the relationship code for the subsequent interment case is the same as that for the first interment case.

US013.1 – Reactivate Eligibility Cases Created in EOAS that Have Been Cancelled or Denied in BOSS

As either an Eligibility Office Supervisor or an Eligibility Case Manager working in BOSS, I need to be able to reactivate and work on eligibility cases that originated in EOAS but got inactivated (i.e., cancelled or denied) in BOSS so that I can access and work them.

Table 2-33: US013.1 Requirements Elaboration

BN#	BN13: BOSS Processing Associated with EOAS
OWNER#s	13.2

Business Goals	Allow eligibility cases created in EOAS that go into a cancelled (CA) or denied (DC) status in BOSS and then are reactivated are returned to previous case status (NV), so they can be worked further.. When reactivated, case goes back to status prior to denied (NV).
Feature Capability	System Enhancement
Constraints	None Identified
Acceptance Criteria	<ul style="list-style-type: none"> Working in BOSS, Eligibility Office Supervisors and Eligibility Case Managers shall be able to reactivate inactive eligibility cases that originated in EOAS, return them to their previous status of either cancelled (CA) or denied (DE), and work on them again. When a first interment is deemed eligible, Eligibility Office Supervisors and Eligibility Case Managers shall be able to process subsequent eligibility cases without delay.

US014.0 – Expand Entry Fields on FBI Fax Sheet to Accommodate Handwritten Data

As either an Eligibility Office Supervisor or Eligibility Case Manager, I need expanded entry fields that use the entire page on the FBI Fax sheet so that the height of the table rows are big enough to accommodate hand written data (which in many cases may be double the size of typed text).

Table 2-34: US014.0 Requirements Elaboration

BN#	BN14: Provide Modified FBI Fax Sheet in the EOA Time of Need System
OWNER#s	NA
Business Goals	Modify the FBI Fax sheet to expand entry fields to fit the entire page and make rows wide enough for FBI personnel to enter hand written data.
Feature Capability	Bug Fix
Constraints	FBI Fax sheet to be with 1 page only utilizing the entire page to accommodate hand written data
Acceptance Criteria	Eligibility Office Supervisors and Eligibility Case Managers shall be able to send a single-page FBI fax sheet with data entry fields that are large enough to accommodate handwritten entries within each row.

2.6.1.EOA Manual Pre-Need Processing

User stories are written from the perspective of the users of the system. The following functional specifications pertain to the EOA Time-of-Need System.

US015.0 – EOAS Pre-Need Access and Rights for Scheduling Agent/Call Center Lead

As a Scheduling Agent/Call Center Lead in EOAS, I need read-only access to Pre-Need cases—without being able to access Time-of-Need cases—so that I can answer Call Center queries about Pre-Need submissions.

Table 2-35: US015.0 Requirements Elaboration

BN#	BN15: EOAS User Roles and Authorities
OWNER#s	None
Business Goal	The system shall be modified to allow a Scheduling Agent/Call Center Lead to have read-only access to Pre-Need Cases.
Feature Capability	User Roles, Access, and Rights
Constraints	No access to Time of Need cases (not even inquiry capability)
Acceptance Criteria	Scheduling Agents/Call Center Leads shall have read-only access to Pre-Need cases in EOAS. They will not have access to Time of Need cases.

US016.0 – EOAS Pre-Need Access and Rights for Eligibility Office Supervisor and Case Tagging

As an Eligibility Office Supervisor, I need to be able to assign and reassign cases in the Case Management System by Name and USERID of Eligibility Case Managers so that I can manage their workloads.

Table 2-36: US016.0 Requirements Elaboration

BN#	BN15: EOAS User Roles and Authorities, BN16: Add Pre-Need Case Management Feature
OWNER#s	16.1 (CCR2151), 16.2, 16.3
Business Goal	<p>The system shall allow an Eligibility Office Supervisor to assign and reassign cases to Eligibility Case Managers in the Case Management System.</p> <p>For both assigned and reassigned Pre-Need cases, the system shall log USERID and name of person who performed action as well as one of the following action tags.</p> <ul style="list-style-type: none">▪ ADDED: Case is newly added to the system.▪ OPENED: Case is selected from Process New Case screen and information has been updated.▪ UPDATED: Anytime case is updated.▪ CLOSED: Case is closed.▪ REASSIGNED: Case is reassigned.
Feature Capability	User Roles, Access, and Rights; System Enhancement

Constraints	None Identified
Acceptance Criteria	<p>In the Case Management System, Eligibility Office Supervisors shall be able to assign and reassign cases to Eligibility Case Managers (by Name and USERID), and the system shall log USERID and Name of the Eligibility Office Supervisor who performed the action as well as one of the following action tags.</p> <ul style="list-style-type: none"> ▪ ADDED: Case is newly added to the system. ▪ OPENED: Case is selected from Process New Case screen and information has been updated. ▪ UPDATED: Anytime case is updated. ▪ CLOSED: Case is closed. ▪ REASSIGNED: Case is reassigned.

US016.1 – EOAS Pre-Need Access and Rights for Eligibility Case Manager

As an Eligibility Case Manager, I need to be able to see my case assignments in the Case Management System—without being able to reassign cases—and request Caseload Timeliness Report by employee (Name and USERID) that include cumulative daily, monthly, and annual case counts. I also need to be able to change case assignments so that I can manage employee workload and maintain the integrity of the system.

Table 2-37: US016.1 Requirements Elaboration

BN#	BN15: EOAS User Roles and Authorities, BN16: Add Pre-Need Case Management Feature
OWNER#s	16.4, 16.7
Business Goal	The system shall be modified to allow an Eligibility Case Manager to view all Pre-Need cases assigned to them in the Case Management System.
Feature Capability	User Roles, Access, and Rights
Constraints	Do not grant access rights to Eligibility Case Managers to execute case management workload reports for anyone other than themselves.
Acceptance Criteria	<ul style="list-style-type: none"> ▪ Eligibility Case Managers shall be able to request Caseload Timeliness Reports by employee and see cumulative daily, monthly, and annual case counts. ▪ Eligibility Case Managers shall not be able to change case assignments in the Case Management System.

US016.2 – Pre-Need Case Assignment and Reassignment as an Eligibility Office Supervisor

As either an Eligibility Office Supervisor or Eligibility Case Manager, I need to be able to see all case assignment updates in order to manage workloads and increase efficiency.

Table 2-38: US016.2 Requirements Elaboration

BN#	BN15: EOAS User Roles and Authorities
OWNER#s	16.5
Business Goal	Viewing cases is not limited to assigned agent.
Feature Capability	User Roles, Access, Rights
Constraints	Cannot change history of case assignments.
Acceptance Criteria	Eligibility Office Supervisors and Eligibility Case Managers shall be able to see all Pre-Need cases in the system but not be able to change case histories.

US016.3 – Allow All Users to View Their Own Caseload Timeliness Reports

As any user of the system, I need to be able to view my own caseload reports and see updated assignments so that I can manage my workload and increase efficiency.

Table 2-39: US016.3 Requirements Elaboration

BN#	BN15: EOAS User Roles and Authorities, BN16: Add Pre-Need Case Management Feature
OWNER#s	16.8
Business Goal	The system shall log any case assignment and reassignment as an UPDATE to the case Journal.
Feature Capability	User Roles, Access, Rights
Constraints	Cannot change history of case assignments.
Acceptance Criteria	Any user of the system shall be able to view their own case load report and see any assigned or reassigned case logged with UPDATE in the case Journal.

US016.4 – Eligibility Office Supervisor and Eligibility Case Manager View Case History

As either an Eligibility Office Supervisor or Eligibility Case Manager, I need to be able to view the history of case actions (Added, Updated, Closed, and Reassigned) that have been performed and the USERID and Name of the person who performed those actions in order to manage workloads and case timeliness.

Table 2-40: US016.4 Requirements Elaboration

BN#	BN16: Add Pre-Need Case Management Feature
OWNER#s	16.2, 16.3

Business Goal	<p>The system shall display the history of actions as follows.</p> <ul style="list-style-type: none"> ▪ ADDED: Case is newly added to the system. ▪ OPENED: Case is selected from Process New Case screen and information has been updated. ▪ UPDATED: Anytime case is updated. ▪ CLOSED: Case is closed. ▪ REASSIGNED: Case is reassigned.
Feature Capability	System Enhancement
Constraints	Only Eligibility Office Supervisors and assigned Eligibility Case Manager can view, re-assign, modify, add, update, and close Pre-Need eligibility cases.
Acceptance Criteria	<p>Eligibility Office Supervisors and Eligibility Case Managers shall be able to add, open and modify, update, close and assign or reassign Pre-Need eligibility cases as well as to view case histories that include Name, USERID, and one of the following action tags.</p> <ul style="list-style-type: none"> ▪ ADDED: When a user adds an Eligibility Case, the system shall tag that case as ADDED and record USERID and name of the user who added the case. ▪ OPENED: When a user opens an Eligibility Case, the system shall tag that case as OPENED and record USERID and name of the user who opened the case. ▪ UPDATED: When a user updates an Eligibility Case, the system shall tag that case record as UPDATED and record USERID and name of the user who updated the case. ▪ CLOSED: When a user closes an Eligibility Case, the system shall tag that case as CLOSED and record USERID and name of the user who closed the case. ▪ REASSIGNED: When a user reassigns an Eligibility Case, the system shall tag that case as REASSIGNED and record USERID and name of the user who reassigned the case.

US016.5 – Eligibility Office Supervisor and Eligibility Case Manager Caseload Timeliness Reports Management

As either an Eligibility Office Supervisor or Eligibility Case Manager, I need to generate a report for any selected period of dates that provides a status of caseload aging so that I may more effectively manage the Eligibility Case Manager caseload.

Table 2-41: US016.5 Requirements Elaboration

BN#	BN16: Add Pre-Need Case Management Feature
OWNR#s	16.6, 16.7, 16.8

Business Goals	<p>Case Aging should be able to select any calendar timeframe and report the number of cases added, closed, cases pending (worked but not added or completed).</p> <p>Calendar timeframe should be able to select a minimum of a one (1) day.</p> <p>Caseload Aging reporting can be generated by assigned Eligibility Case Manager.</p>
Feature Capability	Reporting
Constraints	Eligibility Case Managers cannot view Caseload Aging Reports for other Eligibility Case Managers.
Acceptance Criteria	<ul style="list-style-type: none"> For each case state, all users shall be able to generate a report for a single day, monthly totals, and annual totals. The Eligibility Case Manager shall be able to generate a Caseload Aging Report for only their assigned cases.

US016.6 – Add USERID’s for All Existing Reports

As any user of the system, I need to be able to view the USERID on all existing reports so that I can see who is working what cases.

Table 2-42: US016.6 Requirements Elaboration

BN#	BN16: Add Pre-Need Case Management Feature
OWNER#s	16.6, 16.7, 16.8, 16.9
Business Goals	<p>For any selected timeframe, generate Caseload Timeliness Reports that include the following.</p> <ul style="list-style-type: none"> Number of cases added Number of cases pending (but not added or completed) Number of cases completed <p>Enable Eligibility Case Managers to request Caseload Timeliness Reports by employee that include cumulative daily, monthly, and annual case counts.</p> <p>Add USERID’s to the existing reports.</p> <ul style="list-style-type: none"> Pending by Organization Pending Over 48 Hours Timeliness by Organization Timeliness by Case <p>All users of the system can view their own caseload reports.</p>
Feature Capability	System Enhancement, Reporting
Constraints	None Identified

Acceptance Criteria	<p>All users of the system shall be able to view USERID's on all reports as well as generate their own caseload reports (Caseload Timeliness Reports?) that include the following:</p> <ul style="list-style-type: none"> ▪ Number of cases added ▪ Number of cases pending (but not added or completed) ▪ Number of cases completed <p>Additionally, Eligibility Case Managers shall be able to request Caseload Timeliness Reports by employee that include cumulative daily, monthly, and annual case counts.</p>
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US017.0 – Prevent an EOA Pre-Need Case from Leaving Queue without Being Assigned

As either an Eligibility Office Supervisor or Eligibility Case Manager, I should not be able to exit the PROCESS NEW CASE queue without the case being returned to the queue or assigned to me.

Table 2-43: US017.0 Requirements Elaboration

BN#	BN17: Prevent an EOA Case from Leaving its queue without Being Worked
OWNER#s	17.1, 17.2
Business Goals	<p>The system should provide options to the user to be able to:</p> <ul style="list-style-type: none"> ▪ Return the case to the queue ▪ Assign the case <p>On the EOA menu, move “Open Case” button away from “Process New Case” button—preferably to the bottom of the menu.</p>
Feature Capability	System Enhancement
Constraints	On the EOA menu, the Open Case button cannot be located near the Process New Case button.
Acceptance Criteria	<ul style="list-style-type: none"> ▪ All cases in the case management system shall have a status of Added, Pending, or Closed. ▪ From the EOA menu, the Open Case button shall display at the bottom of the menu and away from the Process New Case buttons. ▪ If user exits a case without either assigning the case or returning it to the PROCESS NEW CASE queue, an error message shall display.

US018.0 – Search Open Cases by USERID of Last Person Assigned

As either an Eligibility Office Supervisor or Eligibility Case Manager, I need to be able to search for open cases in the system by USERID of the person who last updated or was assigned to the case.

Table 2-44: US018.0 Requirements Elaboration

BN#	BN18: Enable Open Case to Search Using USERID of Last Person
OWNR#s	None
Business Goals	Modify the Open Case feature to include search capability using the USERID of the last person to update the case.
Feature Capability	System Enhancement
Constraints	None Identified
Acceptance Criteria	<ul style="list-style-type: none"> ▪ The menu of the system's Open Case feature shall include a search function. ▪ Eligibility Office Supervisors and Eligibility Case Managers shall be able to search open cases in the system using "USERID of Last Person" as a filter for the person who last updated or was last assigned to a case.

US019.0 – Let Office Supervisors Review Unassigned Pre-Need Cases in Queue

As an Eligibility Office Supervisor, I need to review unassigned Pre-Need cases in the queue in order to assess the scope of pending work and manage workload.

Table 2-45: US019.0 Requirements Elaboration

BN#	BN19: Allow Eligibility Office Supervisor to Review Unassigned Cases
OWNR#s	None
Business Goals	The system shall allow the Eligibility Office Supervisor to review the unassigned Pre-Need cases in the system queue.
Feature Capability	System Enhancement
Constraints	Only the Supervisor can view all unassigned Pre-Need cases.
Acceptance Criteria	Eligibility Office Supervisors shall be able to view all unassigned Pre-Need cases in the queue.

US020.0 – Automatically Pre-populate Veteran Data on Veterans Information Screen

As either an Eligibility Office Supervisor or Eligibility Case Manager, I need the Veterans Information screen to be pre-populated with Veteran data so that I can prevent re-entry of information.

Table 2-46: US020.0 Requirements Elaboration

BN#	BN20: Correct/Improve System for VMS Functionality
OWNR#s	20.1

Business Goals	Automatically pre-populate Date of Birth, Date of Death, and all available data on Veteran Information screens.
Feature Capability	System Enhancement, Data Quality
Constraints	None Identified
Acceptance Criteria	On the Veteran Information screen, the system shall pre-populate the following Veteran data. <ul style="list-style-type: none"> ▪ Date of Birth ▪ Date of Death ▪ All other available data

US020.1 – Pre-populate Veteran and Veteran Decedent Data

As either an Eligibility Office Supervisor or Eligibility Case Manager, I need VMS input screens to be pre-populated with Veteran and Veteran decedent's data so that I can prevent re-entry of information.

Table 2-47: US020.1 Requirements Elaboration

BN#	BN20: Correct/Improve System for VMS Functionality
OWNER#s	20.2, 20.3
Business Goals	<ul style="list-style-type: none"> ▪ The EOAS system shall prepopulate the Veteran fields with Veteran data on the VMS input screens (Decedent's screen). ▪ The EOAS system shall prepopulate the Decedent fields with Decedent data on the VMS input screens.
Feature Capability	System Enhancement, Data Quality
Constraints	None Identified
Acceptance Criteria	On VMS input screens, the system shall pre-populate the following. <ul style="list-style-type: none"> ▪ Veteran fields with Veteran data. ▪ Decedent fields with decedent data.

US020.2 – Generate VMS on Demand

As either an Eligibility Office Supervisor or Eligibility Case Manager, I need to generate a VMS (with current data) on-demand from the Journal screen without creating a new EOAS report so that I can view all current information in one location.

Table 2-48: US020.2 Requirements Elaboration

BN#	BN20: Correct/Improve System for VMS Functionality
OWNER#s	20.4
Business Goals	The system shall allow for the VMS to be generated on demand at any time from the Journal screen for viewing purposes, with the most current data without doing a Submit action.

Feature Capability	System Enhancement
Constraints	
Acceptance Criteria	<p>Eligibility Office Supervisors and Eligibility Case Managers shall be able to perform the following tasks.</p> <ul style="list-style-type: none"> ▪ From the Journal screen, generate a VMS on-demand. ▪ View current data on a VMS without creating a new report.

US020.3 – Modify VMS Output Form and VMS Preview Screen

As either an Eligibility Office Supervisor or Eligibility Case Manager, I need correct information so that I can make an accurate selection for the VMS output form.

Table 2-49: US020.3 Requirements Elaboration

BN#	BN20: Correct/Improve System for VMS Functionality
OWNR#s	20.5, 20.6, 20.7
Business Goals	<ul style="list-style-type: none"> ▪ On the VMS output form, rename the “Sex (M/F)” field to display as “Gender”. ▪ On the VMS Preview screen, rename the “Save” button as “Submit”. ▪ Add several new options to the Organization drop-down menu located on the Contact Information screen. ▪ In the Race field, include a selection for “Hispanic”.
Feature Capability	System Enhancement
Constraints	None Identified
Acceptance Criteria	<p>Eligibility Office Supervisors and Eligibility Case Managers can see the following changes to VMS.</p> <ul style="list-style-type: none"> ▪ On the VMS output form, a Gender field might display instead of the Sex (M/F) field. ▪ On the VMS form, the Race field shall include a selection for Hispanic. ▪ On the VMS Preview screen, a Submit button should display instead of a Save button. ▪ On the Contact Information screen, the Organization drop-down menu shall offer the following options. <ul style="list-style-type: none"> ○ NPRC ○ RMC ○ 391 ○ Microfilm ○ Merchant Marines

US021.0 – Add “Sent To” Journal Entry for Electronic Requests in Addition to Capability to Generate a Fax Request

As either an Eligibility Office Supervisor or Eligibility Case Manager, I need to be able to include “Sent To” information (for Journal entry) for requests that are sent electronically in lieu of generating a fax request and for reporting purposes. I need the option to add “Sent To” Journal entry in addition to a “Received From” Journal entry.

Table 2-50: US021.0 Requirements Elaboration

BN#	BN21: Improve System for Journal Functionality
OWNER#s	21.1, 21.2, 21.3
Business Goals	The system shall allow an option to record electronic requests (in contrast to fax requests) using the term “Sent To”.
Feature Capability	System Enhancement, Reporting
Constraints	None Identified
Acceptance Criteria	<p>Eligibility Office Supervisors and Eligibility Case Managers shall be able to use select a Sent To option and provide information for the following fields.</p> <ul style="list-style-type: none">▪ “Type of Delivery” – required▪ “Remarks” – optional <p>In addition, the system shall log “Sent To” information similarly to fax generation for the purpose of reporting in both the Pending by Org Report and the Timeliness by Org Report.</p>

US021.1 – Modifications for Manual Journal Entries

As either an Eligibility Office Supervisor or Eligibility Case Manager, I need to be able to view and select modifications made for manual journal entries

Table 2-51: US021.1 Requirements Elaboration

BN#	BN21: Improve System for Journal Functionality
OWNER#s	21.4, 21.5
Business Goals	<p>For manual journal entries the system shall:</p> <ul style="list-style-type: none">▪ Have additional values for the field “Showing” on the manual Journal entries titled “Discharge Under Honorable Conditions” and “Discharge General (Under Honorable Conditions)”.▪ Rename “ADMIN DECISION” to “ADMIN. DECISION/MEMORANDUM.” in the Type of Document field.
Feature Capability	System Enhancement
Constraints	None Identified

Acceptance Criteria	<ul style="list-style-type: none"> From manual journal entries, Eligibility Office Supervisors and Eligibility Case Managers shall be able to view and select two new values in the Showing field: <ul style="list-style-type: none"> Discharge Under Honorable Conditions Discharge General (Under Honorable Conditions) In the Type of Document field from manual journal entries, Eligibility Office Supervisors and Eligibility Case Managers might view and select an option entitled “ADMIN DECISION/MEMORANDUM” (instead of “ADMIN/DECISION”).
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US021.2 – Modify Military Data Tab

As either an Eligibility Office Supervisor or Eligibility Case Manager, I need to be able to view all available military data sent from BOSS—even if some military service fields are blank. In addition, for accuracy, military service action periods shall not be allowed to overlap.

Table 2-52: US021.2 Requirements Elaboration

BN#	BN21: Improve System for Journal Functionality
OWNR#s	21.6, 21.7
Business Goals	<ul style="list-style-type: none"> The EOAS system shall allow Military branch to be displayed on the Journal Military tab when no additional military data is available. The EOAS system shall not allow military date periods to overlap when there are multiple periods of service on the military data tab.
Feature Capability	System Enhancement, Data Quality
Constraints	Military date periods cannot overlap.
Acceptance Criteria	<p>For manual journal entries, Eligibility Office Supervisors and Eligibility Case Managers can verify the following.</p> <ul style="list-style-type: none"> When no additional military data is available, military branch displays on the Journal Military tab. When there are multiple periods of service on the Military Data tab, Military date periods do not overlap.

US021.3 – Add New Options to Organizations Drop-Down Menu

As an Eligibility Office Supervisor or Eligibility Case Manager, I need to be able to view and select new options in the Organizations drop-down menu so that I can accurately record from where the request originated.

Table 2-53: US021.3 Requirements Elaboration

BN#	BN21: Improve System for Journal Functionality
OWNR#s	21.8
Business Goals	The EOAS system’s Organizations drop-down list shall be modified to include: “State Cemetery”, “MPS”, “MIAP”, and “Other”.

Feature Capability	System Enhancement
Constraints	None
Acceptance Criteria	<p>From the Organizations drop-down menu, the following new options shall be available.</p> <ul style="list-style-type: none"> ▪ State Cemetery ▪ MPS ▪ MIAP ▪ Other

US021.4 – Pre-Need Record Update When Case Is Closed

As an Eligibility Office Supervisor or Eligibility Case Manager, I need to record information when the Pre-Need case is closed so that I know about the case review.

Table 2-54: US021.4 Requirements Elaboration

BN#	BN21: Improve System for Journal Functionality
OWNR#s	21.9
Business Goals	<p>Ability to record the closed Pre-Need case as one of the following.</p> <ul style="list-style-type: none"> ▪ Letter Sent – Incomplete Submission ▪ Letter Sent ▪ Other
Feature Capability	System Enhancement
Constraints	None Identified
Acceptance Criteria	<p>When an Eligibility Office Supervisors or Eligibility Case Managers closes a Pre-Need case, they shall be able to select (and thereby mark) the case as one of the following:</p> <ul style="list-style-type: none"> ▪ Letter Sent ▪ Letter Sent – Incomplete Submission ▪ Other <p>With these actions, the system shall mark the closed case as one of the following:</p> <ul style="list-style-type: none"> ▪ Received (with Letter Sent option) ▪ Incomplete (with Letter Sent – Incomplete Submission option) ▪ Undetermined (with Other option)

US021.5 – Require Reason and Code for Pre-Need Incomplete Submission Letter

As an Eligibility Office Supervisor or Eligibility Case Manager, I need to be able to further qualify a closed Pre-Need case (Letter Sent – Incomplete Submission) with a reason for reporting purposes.

Table 2-55: US021.5 Requirements Elaboration

BN#	BN21: Improve System for Journal Functionality
OWNER#s	21.10
Business Goals	Ability to select reason for Letter Sent – Incomplete Submission as one of the following: <ul style="list-style-type: none"> ▪ Military Discharge ▪ Veteran’s Death Certificate ▪ Adult Dependent Statements ▪ Other
Feature Capability	System Enhancement, Reporting
Constraints	None Identified
Acceptance Criteria	When Eligibility Office Supervisors and an Eligibility Case Managers close a Pre-Need case and further qualify it as Letter Sent – Incomplete Submission, the system shall require one of the following reasons: <ul style="list-style-type: none"> ▪ Military Discharge ▪ Veteran’s Death Certificate ▪ Adult Dependent Statements ▪ Other

US022.0 – Rename Button for Duplicate Record Check Process as “New” Instead of "Accept"

As either an Eligibility Office Supervisor or Eligibility Case Manager, I need the button that appears during the duplicate record check process for Pre-Need to be renamed to “New” instead of "Accept" to alleviate confusion.

Table 2-56: US022.0 Requirements Elaboration

BN#	BN22: Improve System Navigation
OWNER#s	22.1
Business Goals	The EOAS system shall be changed so that the name of the button that appears during the duplicate record check process is renamed “New” instead of "Accept". This process change occurs during the duplicate record check process for Pre-Need when a Pre-Need case is created/established (manually) in EOAS.
Feature Capability	Bug Fix
Constraints	None Identified
Acceptance Criteria	During the duplicate records process, Eligibility Office Supervisors and Eligibility Case Managers can check duplicate records and see an Accept button when a Pre-Need is created/established (manually) in EOAS.

US023.0 – Enhance Interface between BOSS and EOA Systems

As either an Eligibility Office Supervisor or an Eligibility Case Manager, I need to perform exhaustive queries on BOSS Veteran records, allow a Pre-Need Veteran record to be attached to a dependent's Time of Need case, and see that the Pre-Need case converted to Time of Need and is marked PN (for Pre-Need) in the History screen to ensure integrity between the two processes.

Table 2-57: US023.0 Requirements Elaboration

BN#	BN23: Enhance the Interface between BOSS and EOA Systems
OWNER#s	23.1, 23.2, 23.3, 23.4
Business Goals	<ul style="list-style-type: none">▪ The BOSS system shall record a "PN" on the History screen when a Pre-Need record is converted to a Time of Need record.▪ The BOSS system shall maintain the ability to perform exhaustive queries on other Veteran records in BOSS (for duplicate record checks) even though a match is found on a Pre-Need case.▪ Maintain the independence of the Veteran record queries from the case establishment process.▪ BOSS shall allow a Pre-Need Veteran record to be attached to a dependent's Time of Need case.
Feature Capability	System Enhancement
Constraints	None Identified
Acceptance Criteria	<p>Eligibility Office Supervisors and an Eligibility Case Managers can perform the following tasks:</p> <ul style="list-style-type: none">▪ Once a Pre-Need record is converted to a Time of Need record, see that the BOSS system has tagged the record with "PN" on the History screen.▪ Once the Time of Need record is associated to a Pre-Need record, perform name searches on the Veteran record.▪ Search for additional matches for Pre-Need records in BOSS.▪ Find a Veteran's Pre-Need record that is on file and allow it to be associated with the spouse's Time of Need record.▪ Ensure that BOSS allows a Pre-Need Veteran record to be attached to a dependent's Time of Need case.

US024.0 – Provide a Closed Cases – Pre-Need Report

As either an Eligibility Office Supervisor or Eligibility Case Manager, I need to generate a Timeliness by Case Report that lists closed cases for a selected time frame and sorts the display by Case Number or USERID for the purpose of reporting on closed cases.

Table 2-58: US024.0 Requirements Elaboration

BN#	BN24: Enhance System for Reporting
OWNER#s	24.1, 24.4, 24.6

Business Goals	<ul style="list-style-type: none"> ▪ The system shall be modified so that the “Timeliness by Case” report cases appear on the report if the cases were closed anytime during the selected timeframe. ▪ The system shall allow the reports to be sorted Case Number or USERID. ▪ The Case Management reports shall be added.
Feature Capability	Reporting
Constraints	None Identified
Acceptance Criteria	<p>Eligibility Office Supervisors and an Eligibility Case Managers shall be able to select a timeframe, select an option to sort by Case Number or USERID, generate a Timeliness by Case Report, and see the following:</p> <ul style="list-style-type: none"> ▪ Pre-Need cases that were closed during the selected time frame. ▪ Cases in the report sorted by Case Number or USERID. ▪ Any case management report for the selected time frame.

US024.1 – Provide a Closed Pre-Need Cases Report

As either an Eligibility Office Supervisor or Eligibility Case Manager, I need to view Closed Pre-Need Cases Reports showing counts for each of the following: Letter Sent, Letter Sent – Incomplete Submission, Other. Further, cases may be sorted on USERID so that I can provide reporting statistics.

Table 2-59: US024.1 Requirements Elaboration

BN#	BN24: Enhance System for Reporting
OWNR#s	24.7, 24.4, 24.6
Business Goals	<ul style="list-style-type: none"> ▪ For any selected timeframe, the system shall provide a “Closed Pre-Need Cases” Report showing counts based upon status at closing: “Received”, “Incomplete”, and “Undetermined”. Pre-denied cases shall indicate the counts by reason code and reason legend. ▪ The system shall allow counts to be sorted by USERID. ▪ The Case Management reports shall be added.
Feature Capability	Reporting
Constraints	None Identified

Acceptance Criteria	<p>Eligibility Office Supervisors and an Eligibility Case Managers shall be able to select a timeframe, select an option to sort by Case Number or USERID, and generate a Closed Pre-Need Cases Report. Display of the report shall include a listing of case counts based upon the following statuses at closing.</p> <ul style="list-style-type: none"> ▪ Received ▪ Incomplete ▪ Undetermined <p>Listings shall further qualify counts with one of the following actions taken.</p> <ul style="list-style-type: none"> ▪ Letter Sent ▪ Letter Sent – Incomplete Submission ▪ Other <p>When Eligibility Office Supervisors and an Eligibility Case Managers close cases as received but incomplete, the count shall further qualify the status of Letter Sent – Incomplete Submission as follows.</p> <ul style="list-style-type: none"> ▪ Military Discharge ▪ Veteran’s Death Certificate ▪ Adult Dependent Statements ▪ Other
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US024.2 – Replace “Decedent ID” with Cases’ Current USERID

As either an Eligibility Office Supervisor or Eligibility Case Manager, I need to see that the Decedent ID has been replaced with the cases’ current USERID on the following reports: Pending Over 48 Hours, Pending by Organization, Timeliness by Case, and Timeliness by Organization. Also, I need to see Pre-Need case numbers on the Pending Over 48 Hours Report.

Table 2-60: US024.2 Requirements Elaboration

BN#	BN24: Enhance System for Reporting
OWNR#s	24.3, 24.2, 24.4, 24.6, 24.12
Business Goals	<ul style="list-style-type: none"> ▪ The system shall be modified to replace the “Decedent ID” with the cases’ most current USERID on the following reports: <ul style="list-style-type: none"> ○ Pending Over 48 Hours ○ Pending by Organization ○ Timeliness by Case ○ Timeliness by Organization ▪ Allow the reports to be sorted by Case Number or USERID. ▪ The Case Management reports shall be added. ▪ The EOAS system shall be modified to add a column for the Pre-Need Case Number on the “Pending Over 48 Hours” Report. ▪ The Pending Over 48 Hours report shall reflect counts for the Pre-Need cases that are older than 48 hours.
Feature Capability	Reporting

Constraints	None Identified
Acceptance Criteria	<p>Eligibility Office Supervisors and an Eligibility Case Managers shall be able to view any of the following reports (sorted by Case Number or USERID) and see the cases' current USERID but not a "Decedent ID".</p> <ul style="list-style-type: none"> ▪ Pending Over 48 Hours ▪ Pending by Organization ▪ Timeliness by Case ▪ Timeliness by Organization <p>Eligibility Office Supervisors and an Eligibility Case Managers shall be able to view the Pending Over 48 Hours report and see an accounting of Pre-Need cases that are older than 48 hours as well as a Pre-Need Case Number column populated with Pre-Need case numbers.</p>

US024.3 – Add “Sent to” Journal Information for Reporting Purposes

As either an Eligibility Office Supervisor or Eligibility Case Manager, I need to report on cases for which requests were sent to other agencies electronically in addition to those sent by fax so that I can achieve a full accounting of all cases.

Table 2-61: US024.3 Requirements Elaboration

BN#	BN24: Enhance System for Reporting
OWNR#s	24.5, 24.4, 24.6
Business Goals	<ul style="list-style-type: none"> ▪ The system shall consider the “Sent to” journal information in the same respect as generated Fax Sheets for report purposes on the following reports: <ul style="list-style-type: none"> ○ Pending by Org Report ○ Timeliness by Org Report ▪ The system shall allow the reports to be sorted by Case Number or USERID ▪ The Case Management reports shall be added.
Feature Capability	Reporting
Constraints	None Identified
Acceptance Criteria	<ul style="list-style-type: none"> ▪ Eligibility Office Supervisors and Eligibility Case Managers shall be able to add “Sent To” journal information to two reports: Pending by Org Reports and Timeliness by Org Reports. ▪ Eligibility Office Supervisors and Eligibility Case Managers shall be able to sort Pending by Org Reports and Timeliness by Org Reports by Case Number or USERID.

US024.4 – Provide EOA with a Pre-Need Cases Report

As either an Eligibility Office Supervisor or Eligibility Case Manager, I need a statistical report for Pre-Need cases in the EOAS (based on counts accumulated monthly and annually for a 12-month period) that lists counts separately for the following: Cases Opened, Cases Closed and

Cases Converted to Time of Need. The report should accumulate counts separately for Pre-Need cases that originated in EOA and Pre-Need cases that originated from eBenefits. The report should also display counts for two groups of cases: eBenefits Pre-Need cases with a parked status and an accumulated count of eBenefits plus new Pre-Need cases with a parked status.

Table 2-62: US024.4 Requirements Elaboration

BN#	BN24: Enhance System for Reporting
OWNR#s	24.8, 24.9, 24.10, 24.11
Business Goals	<ul style="list-style-type: none"> ▪ 24.8: The system shall provide separate counts for “Cases Opened”, “Cases Closed” and “Cases Converted to Time of Need” on the Pre-Need Cases Report. ▪ 24.9: The system shall accumulate counts on a monthly and annual basis for a 12-month period on the Pre-Need Statistical Report. ▪ 24.10: The system shall accumulate separate counts for Pre-Need cases Added in EOAS versus those that originated from eBenefits on the Pre-Need Statistical Report. ▪ 24.11: The system shall show the number of Parked eBenefits cases, and Parked eBenefits + new Pre-Need cases on the Pre-Need Statistical Report.
Feature Capability	Reporting
Constraints	None Identified
Acceptance Criteria	<p>Eligibility Office Supervisors and Eligibility Case Managers should be able to view a Pre-Need Cases Report (based on counts accumulated monthly and annually for a 12-month period) that lists counts separately for the following cases:</p> <ul style="list-style-type: none"> ▪ Cases Opened ▪ Cases Closed ▪ Cases (Pre-Need) Converted to Time of Need <p>The report should accumulate counts separately for Pre-Need cases that originated in EOA and Pre-Need cases that originated from eBenefits. The report should also display counts for two groups of cases: eBenefits Pre-Need cases with a parked status and an accumulated count of eBenefits plus new Pre-Need cases with a parked status.</p>

US025.0 – Analyze Design Changes Required to Create Interface between Pre-Need and eBenefits

As the NCA Business Owner and OI&T PD Team, we need to assess the breadth of design changes needed for a Pre-Need/eBenefits interface to determine how the interface might be adopted in Manual Pre-Need as well as what impact the changes it requires will have on Manual Pre-Need.

Table 2-63: US025.0 Requirements Elaboration

BN#	BN25: Analyze Design Changes for Pre-Need/eBenefits Interface
OWNER#s	None
Business Goals	Complete an analysis of the design changes for the Pre-Need/eBenefits interface to determine how it will be adopted for or impact Manual Pre-Need. The ranking for this requirement is HIGH.
Feature Capability	Interoperability
Constraints	None Identified
Acceptance Criteria	Working with the NCA Business Owner, the OI&T PD Team shall provide a complete and comprehensive analysis of design changes need to create an interface between EOA Pre-Need and eBenefits. The analysis shall include how the proposed interface might best be adopted in Manual Pre-Need as well as the impact of required changes on Manual Pre-Need.

2.7. Graphical User Interface Specifications

The Graphical User Interface (GUI) specifications for this application are captured in a separate artifact, per the MBMS BOSS Enterprise Enhancements PWS. See: Wireframes Document for GUI specifications.

2.8. Multi-divisional Specifications

The EOA sub-system is a component of the BOSS enterprise application designed to provide benefit delivery support to National Cemetery facilities nationwide. Operation of EOA is limited to the NCA Eligibility Office, located in St. Louis, MO.

2.9. Performance Specifications

EOA RSD v2.0 indicates the following performance specifications:

- System response times and page load times shall be consistent with BOSS standards (using the Scheduling module as one of the highest usage requirements, there are approximately 30 scheduling agents presently performing an average of 6-7 case establishment transactions per hour in BOSS; in addition, in the National Cemetery arena there are a minimum of three Cemetery Representatives at 131 National Cemeteries performing an average of 8-12 transactions daily in BOSS)
[RSD v3.0 note: not sure how these statistics translate into performance metrics]

EOA RSD v2.0 also cites the BRD as the source of the following statement:

- The best available information is that the National Cemeteries are presently in their peak demand cycle and should stay that way for the next few years. Demand is projected to slow down since many of the WWII-era Veterans have already passed on. This trend is expected to accelerate if an expected withdrawal from the Iraq and Afghanistan wars

takes place. However, many Veterans of the Korean and Vietnam wars are approaching the age when they are more likely to pass on.

2.10. Quality Attributes Specification

EOA will comply with the quality specifications defined in the EOAS & Pre-Need Enablement Test Plan. The current ProPath/PMAS RTM template provides the following Enterprise specification:

- A monitoring process shall be provided to ensure that data is accurate and up-to-date and provides accurate alerts for malfunctions while minimizing false alarms.

2.11. Reliability & Performance Specifications

The following specification was identified in an earlier version of the EOA RSD (v2.0):

- Continuity of operations and disaster recovery should be as close to 24/7 as possible.

The following set of specifications are Enterprise requirements found in the current PMAS/ProPath RTM Template:

- Information about response time degradation resulting from unscheduled system outages and other events that degrade system functionality and/or performance shall be disseminated to the user community within 30 minutes of the occurrence. The notification shall include the information described in the current Automated Notification Reporting (ANR) template maintained by the VA Service Desk. The specific business impact must be noted in order for OIT to provide accurate data in the service impact notice of the ANR.
- Provide a real-time monitoring solution to report agreed/identified critical system performance parameters.
- Critical business performance parameters shall be identified e.g., transaction speed, response time for screen display/refresh, data retrieval, etc. in a manner that data capture can occur to support metric reporting and support the OI&T performance dashboard display. If no such performance metrics are required or provided there will be no program specific Service Level Agreements (SLA) created, nor shall there be any active/real time monitoring through OI&T Performance Dashboard to provide the business owners any performance metrics.
- Notification of scheduled maintenance periods that require the service to be offline or that may degrade system performance shall be disseminated to the business user community a minimum of 48 hours prior to the scheduled event.

2.12. Scope Integration

From an application standpoint, the EOA subsystem exists as part of the BOSS/AMAS application developed and deployed on Oracle Forms Server. EOA specific data is persisted in the BOSS Oracle database located at the Quantico ITC. EOA presentation and business logic is presently packaged and deployed in Oracle Forms Servers.

The two figures below, extracted from EOA RSD v2.0, provide the business process flow and application context for the currently developed EOA enhancement application.

Figure 2-1: EOA Business Process Diagram

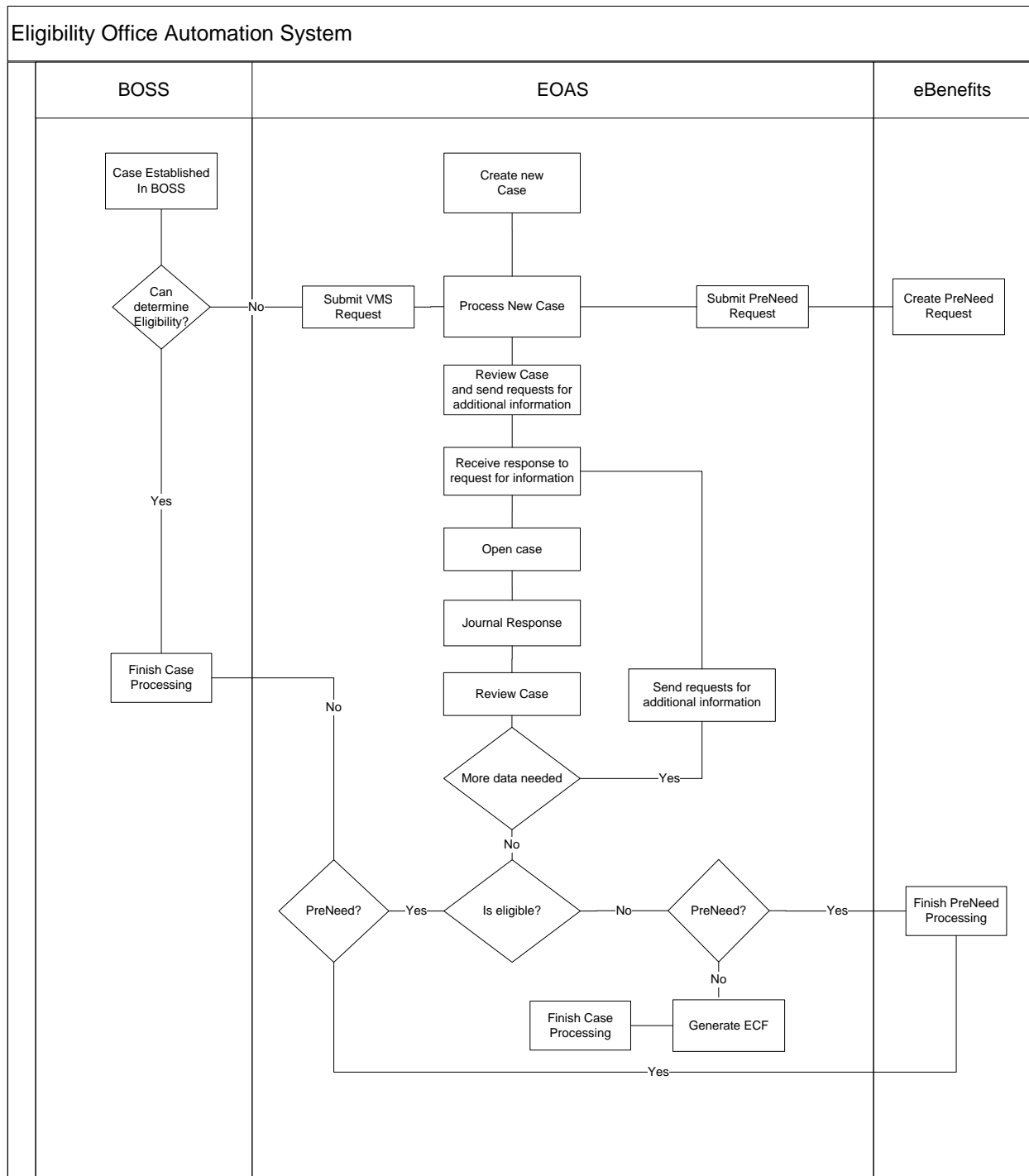
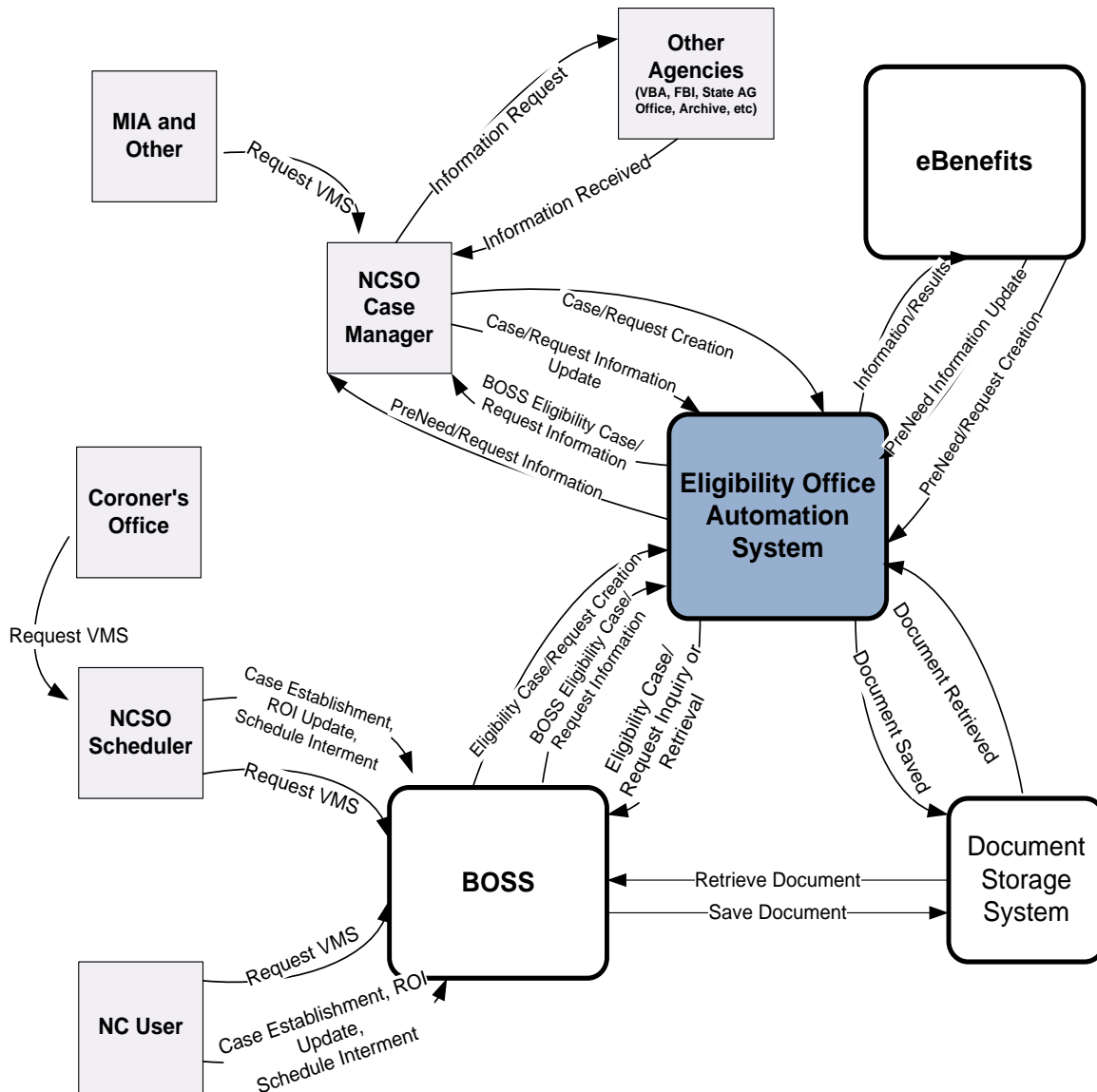


Figure 2-2: EOA Application Context Diagram



2.13. Security Specifications

The following information was taken from EOA RSD v2.0. This material was caveated by a highlighted statement that *clarification is needed from Dave to confirm whether the information is sufficient*.

EOA will not transmit any digitalized information outside of the VA organization. The VA 6500 requirements for “moderate” categorized systems and the following business-specific security requirements for User Access control:

Table 2-64: EOA User Roles and Authorities

Role	Authority
Eligibility Office Supervisor	Write/Update access to all fields
Eligibility Case Manager	Write/Update access to all fields except cannot assign cases in case management and cannot execute case management workload reports
Scheduling Agent/Call Center Lead	Read only access to Pre-Need Cases No access to Time of Need cases Submit a VMS
Cemetery Users	Update access to Sensitive Case Advisory processing Submit a VMS

2.14. System Features

The core system features for the Eligibility Office Automation System and Pre-Need Enablement Enhancement are defined in the form of Use Cases, as elaborated in Appendices A and B. As of this draft version of the RSD, the following Use Cases have been identified:

Table 2-65: Primary System Features

Login	Standard login flow for user to access EOA system. Factors in user roles, permissions, passwords, and other related login considerations.
Create New Case	Top-level use case for manually creating a new EOA case. This use case will be further decomposed and elaborated in a separate use case model.
Perform Duplicate Check	Extends Create New Case. A set of steps to ensure that the new EOA record to be entered does not already exist. If confirmed as a new record, system will allow processing to continue.
Process Case	Top-level use case for performing all tasks related to processing an EOA case.
View/Update Case	Process flow for selecting an existing case for viewing and/or updating.
Logout	Standard logout flow for user exiting EOA application.
Request Additional Information	Workflow for requesting additional supporting information related to a case from an external data source.
Receive Additional Information	Workflow for receiving additional supporting information related to a case from an external data source.

Reassign Case	Process and business rules for reassigning an existing EOA case from the current owner to a new owner.
Run Report	Standard flow for selecting a report type and associated criteria for generating a pre-defined report.
Print Report	Extends Run Report. Allows user to send the produced report to a printer device.
Save Report	Extends Run Report. Allows user to save the produced report to a designated location (e.g., local or VA shared drive) in a defined format. (Note: format, such as PDF to be determined.)
Receive VMS Request	Workflow for receiving a Verification of Military Service request from the BOSS application (as a result of a BOSS user action).

2.15. Usability Specifications

This section not yet addressed.

3. Applicable Standards

Applicable standards, as enumerated in EOA RSD v2.0 are listed below.

- All specification will comply with VA 508 Accessibility standards
- The VA 6500 requirements for “moderate” categorized systems and the following business-specific security requirements for User Access control

4. Interfaces

Technical details around ports, protocols, hardware, and other interfaces are outside the scope of this RSD. As applicable, technical interfaces will be defined as part of the System Design Document.

4.1. Communications Interfaces

Technical details around these communications interfaces are outside the scope of this RSD. As applicable, communications interfaces will be defined as part of the System Design Document.

4.2. Hardware Interfaces

Details around hardware interfaces are outside the scope of this RSD. As applicable, they will be defined as part of the System Design Document.

4.3. Software Interfaces

Details around the software interface are outside the scope of this RSD. As applicable, they will be defined as part of the System Design Document.

4.4. User Interfaces

The EOA application will adhere to a modern data processing application, with standard controls and workflows common to application users. Details around the graphical user interface will be defined as part of the Wireframes Document.

5. Legal, Copyright, and Other Notices

There are no copyright, or other notice requirements for this application.

6. Purchased Components

There are no purchased or licensed components.

6.1. Defect Source

The two tables below were extracted from EOA RSD v2.0.

Table 6-1 lists the CCR's identified for each of the EOA Time of Need Business Needs in the BRD as part of the EOA enhancement project.

Table 6-1: EOA Time of Need Change Code Requests

BN#	BN Title	CCR#
BN1	EOS User Roles and Authorities	NA
BN2	Add EOA Case Management Feature	CCR2138
BN3	Prevent an EOA Case from Leaving its queue without Being Worked	CCR2114
BN4	Enable Open Case to Search Using USERID of Last Person	CCR2151
BN5	Allow Eligibility Office Supervisor to Review Unassigned Cases	NA
BN6	Correct/Improve System for VMS Functionality	CCR2121 CCR2122 CCR2122 CCR2127 CCR2338 CCR2123

BN#	BN Title	CCR#
BN7	Improve System for Journal Functionality	CCR2124 CCR2148 CCR2144 CCR2143 CCR2139 CCR2125
BN8	Improve System for ECF Functionality	CCR2136 CCR2120 CCR2137 CCR2351
BN9	Improve System Navigation	CCR2134
BN10	Enhance the Interface between BOSS and EOAS	NA
BN11	Modify EOAS for the Sensitive Case Advisory (SCA)	CCR2147 CCR2161
BN12	Enhance System for Reporting	CCR1993 CCR2112 CCR2149
BN13	BOSS Processing Associated with EOAS	CCR2521 CCR2502
	BN14 Provide Modified FBI Fax Sheet	NA

Table 6-2 lists the CCR's identified for each of the EOA Manual Pre-Need Business Needs in the BRD as part of the EOA enhancement project.

Table 6-2: EOA Manual Pre-Need Change Code Requests

BN#	BN Title	CCR#
BN15	EOS User Roles and Authorities	NA
BN16	Add Pre-Need Case Management Feature	CCR2151
BN17	Prevent a Pre-Need Case from Leaving Its Queue without Being Worked	CCR2114
BN18	Enable Open Case to Search Using USERID of Last Person	NA
BN19	Allow Eligibility Office Supervisor to Review Unassigned Cases	NA

BN#	BN Title	CCR#
BN20	Correct/Improve System for VMS Functionality	CCR2121 CCR2122 CCR2122 CCR2127 CCR2338 CCR2123
BN21	Improve System for Journal Functionality	CCR2124 CCR214 CCR2144 CCR2143 CCR2139 CCR2125
BN22	Improve System Navigation	CCR2134
BN23	Enhance the Interface between BOSS and EOAS	CCR2146 CCR2150 CCR2163
BN24	Enhance System for Reporting	CCR1993 CCR2112 CCR2149

7. User Class Characteristics

As provided in EOA RSD v2.0, the following table lists the intended users of the EOA System and Pre-Need Enablement Enhancement.

Table 7-1: Users of EOA System Enhancements

User	Role
BOSS User	A user at any National Cemetery and generally works with the decedent's case from case establishment to case closure. This user may only access the SCA feature in EOA System.
NCSO Eligibility Office User	Is either a NCSO Eligibility Case Manager or Eligibility Supervisor.
NCSO Eligibility Case Manager	A person in the NCSO Eligibility Office who processes the Eligibility requests, and eventually Pre-Need requests. This person is the primary user of EOA System.

User	Role
NCSO Eligibility Supervisor	A person who supervises the NCSO Eligibility Office. This person has authority over the EOA system, and sole authority for using the case management function in EOA for assigning and re-assigning cases. In practice, this role may also be assigned to the Director of the NCSO as well as to other designated EO individuals in a leadership role.
NCSO Scheduler	A person who schedules the “Time of Need” burial of a Veteran and is located at the NCSO Scheduling Office. This person sends eligibility requests to the Eligibility Office via the EOA System Verification of Military Service (VMS) process.

8. Estimation

Implementation of EOA System and Pre-Need Enablement capability has been scoped to occur within a time-constrained six month period. The complete product backlog will be captured, prioritized, and allocated across multiple development sprints during the six-month development and release period.

Note that the prior RSD version (v2.0, dated August 2014) included a Function Point Analysis (FPA). The MBMS BOSS Enterprise Enhancements PWS did not include this information and the current project execution plan is not based on the FPA model; rather, it is based on the time-based six month period of performance, as prescribed by the contract.

As a point of reference, see: [EOA ES14 Function Point Estimate Workbook](#).

9. Approval Signatures

REVIEW DATE:

SCRIBE:

Signed:

Integrated Project Team (IPT) Chair

Date

Business Sponsor

Date

IT Program Manager

Date

Project Manager

Date

Appendix A Use Case Context Diagram

The Eligibility Office Automation subsystem will accomplish a defined set of functions, as shown in Figure 9-1, Use Case Context Diagram. This diagram calls out the activities and associated system users that comprise the EOA workflow. Each of these components is summarized in Table 9-1, Context Diagram Elements.

This view of the EOA application will be further refined by detailing out the significant use cases, such as Login, Process New Case, View/Update Case, and Generate Report. As applicable, additional specifications, such as business rules, will be provided.

Figure 9-1: Use Case Context Diagram

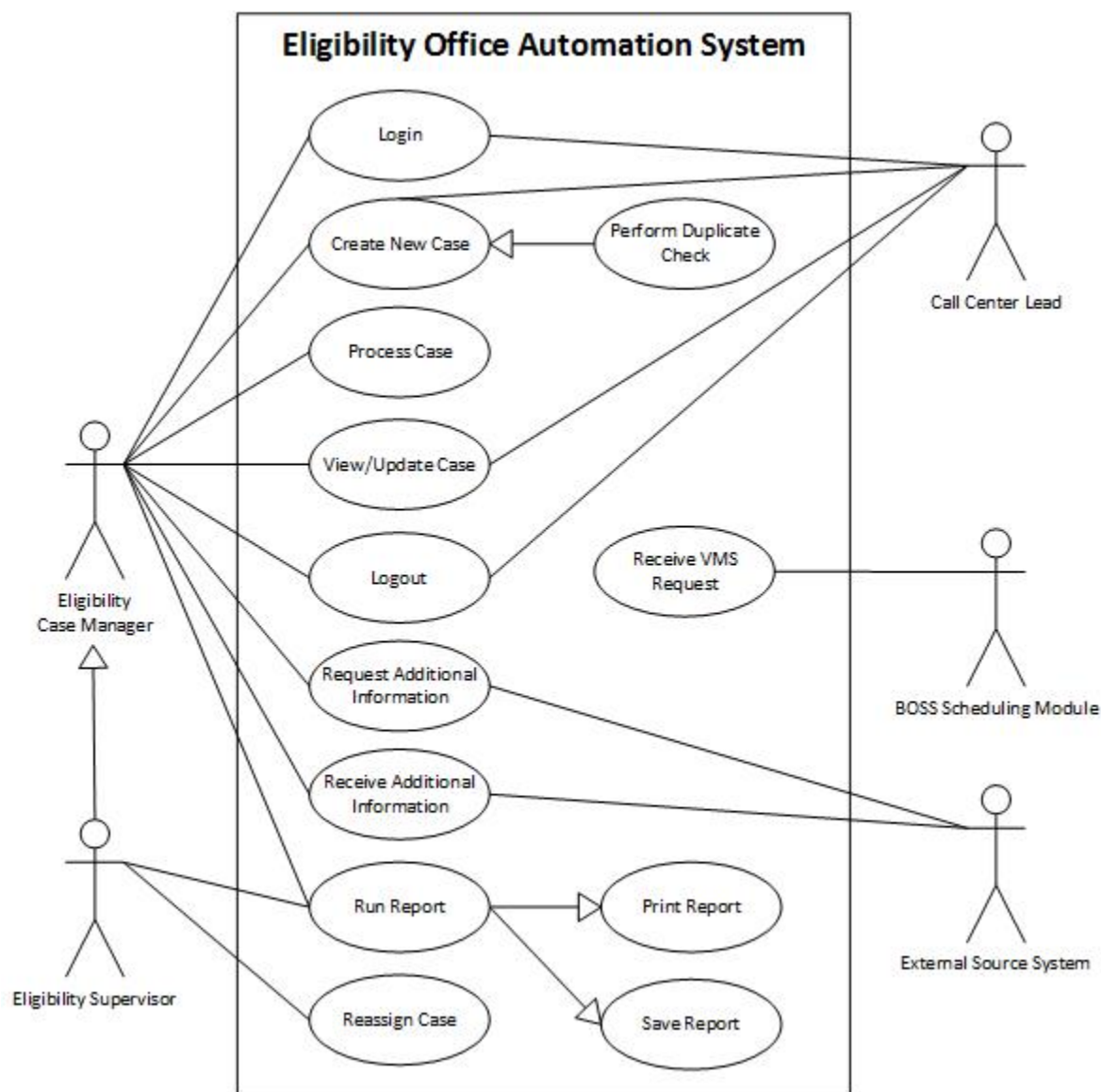


Table 9-1: Context Diagram Elements

<i>Component Name</i>	<i>Type</i>	<i>Description</i>
Eligibility Case Manager	Actor	A person in the NCSO Eligibility Office who processes Eligibility requests, and eventually Pre-Need requests. Primary user of EOA system.
Eligibility Supervisor	Actor	A person who supervises the NCSO Eligibility Office. This person has authority over the EOA system, and sole authority for using the case management function in EOA for assigning and reassigning cases. In practice, this role may also be assigned to the Director of the NCSO as well as to other designated EO individuals in a leadership role.
Call Center Lead	Actor	A member of the NCSO scheduling team who has certain access and privileges within the EOA system. (specifics to be defined via business stakeholder input)
BOSS Scheduling Module	Actor	The BOSS Enterprise scheduling module, which interfaces with EOA by sending Veteran Military Service requests (created by BOSS users) to EOA.
External Source System	Actor	Third party system or database which provides additional information to EOA system related to determining and verifying eligibility.
Login	Use Case	Standard login flow for user to access EOA system. Factors in user roles, permissions, passwords, and other related login considerations.
Create New Case	Use Case	Top-level use case for manually creating a new EOA case. This use case will be further decomposed and elaborated in a separate use case model.
Perform Duplicate Check	Use Case	Extends Create New Case. A set of steps to ensure that the new EOA record to be entered does not already exist. If confirmed as a new record, system will allow processing to continue.
Process Case	Use Case	Top-level use case for performing all tasks related to processing an EOA case.
View/Update Case	Use Case	Process flow for selecting an existing case for viewing and/or updating.
Logout	Use Case	Standard logout flow for user exiting EOA application.

<i>Component Name</i>	<i>Type</i>	<i>Description</i>
Request Additional Information	Use Case	Workflow for requesting additional supporting information related to a case from an external data source.
Receive Additional Information	Use Case	Workflow for receiving additional supporting information related to a case from an external data source.
Reassign Case	Use Case	Process and business rules for reassigning an existing EOA case from the current owner to a new owner.
Run Report	Use Case	Standard flow for selecting a report type and associated criteria for generating a pre-defined report.
Save Report	Use Case	Extends Run Report. Allows user to send the produced report to a printer device.
Print Report	Use Case	Extends Run Report. Allows user to save the produced report to a designated location, such as local or VA shared drive, in a defined format. (note: format, such as PDF to be determined)
Receive VMS Request	Use Case	Workflow for receiving a Verification of Military Service request from the BOSS application (as a result of a BOSS user action).

Appendix B Use Case Specifications

This section to be completed in collaboration with NCA business stakeholders. Use Cases B.1.and B.2 have been drafted as examples for initial discussion.

B.1. Use Case: Login: Create New Case: Manual Process

Brief Description

This section describes the workflow and business rules for launching EOAS for the manual creation of a new case.

Use Case Trigger

Eligibility Office user initiates EOAS to create a new case.

Use Case Actors

- Eligibility Case Manager (User)
- Eligibility Supervisor (User)
- EOA System (System)

Preconditions

- The user has a role and permissions to process an new case.
- The User has all information necessary (Applicant information, Decedent information, Military Service information) to establish a new case.

Post Conditions

- The User successfully establishes a new EOA case.
- The Use successfully determines eligibility.

Business Rules

This section provides special specifications, typically a nonfunctional requirements specific to a use case, but is not easily or naturally specified in the text of the use case's event flow.

- BR1: TBD
- BR2: TBD

Extension Points

None

Alternate Flow

Login: User Credentials are Not Recognized

Table 9-2 – Login: Create New Case: Manual Process

Step	Actor Action	Step	System Action
1	This use case starts when the User initiates the EOA system.	2	The System displays Login page
3	User enters login credentials	4	System recognizes the credentials, and displays the Main Menu <i>Alternate Flow: Login: User Credentials Not Recognized</i>
5	From the Main Menu, User selects 'Add Case' <i>Login: Create New Case: Automated TON</i>	6	System displays the 'Duplicate Case Check' page.
7	User enters decedent information and initiates the search.	8	System searches the database for a matching record. The system does not display a match/duplicate record. <i>Alternate Flow: Create New Case: Duplicate Record</i>
9	User 'accepts' the results	10	The system displays the Contact Informaiton page.
11	User enters contact information and selects 'Next'	12	The system saves the Contact information and displays the 'Decedent Information' screen.
13	User enters decedent information and selects 'Next' <i>Alternate Flow: Process Case: Navigate to Previous Page</i>	14	System saves the decedent record and displays the 'Veteran Information' page.

Step	Actor Action	Step	System Action
15	User enters Veteran information and selects 'Next' <i>Alternate Flow: Process Case: Navigate to Previous Page</i> <i>Process Case: Add Veteran Information – Add Alias</i>	16	The sytem saves the Veteran information and displays the 'Veteran History -Military Service' page. <i>Alternate Flow: Process Case: Add Military Service</i> <i>Alternate Flow: Process Case: Delete Military Service</i>
17	User enters Veteran Military service data, and saves the record. <i>Alternate Flow: Process Case: Navigate to Previous Page</i> <i>Alternate Flow: Create New Case: Cancel</i>	18	System saves the military service record and provides the user with the following options: Edit, or Delete or Add Service. In addition, the sytem displays options to navigate to the previous page, or preview the request for VMS, or to quit the application. <i>Alternate Flow: View/Update Case: Edit Military Service</i> <i>Alternate Flow: View/Update Case: Delete Military Record</i> <i>Alternate Flow: View/Update Case: Add Military Service Record</i>
19	User opts to preview the VMS	20	The System displays the VMS request in a printable and saveable format, and provides options to Save, or Cancel or navigate to the previous page.
21	User selects Save	22	The system saves the record, and the establishes the new Case. This use case ends when the new case is created.

B.2. Use Case: Process Case

Brief Description

This use case describes the workflow and business rules for processing a case.

Use Case Trigger

User selects Open Case from the EOAS Main Menu

Use Case Actors

- Eligibility Case Manager (User)
- Eligibility Supervisor (User)
- EOA System (System)

Preconditions

- The user has a role and permissions to process an EOAS case.
- The User has recieved a enough information to determine a positive eligibility result.
- User Login is successful

Post Conditions

- The User successfully establishes a positive eligibility result and exits from the system.

Business Rules

This section provides special specifications, typically a nonfunctional requirements specific to a use case, but is not easily or naturally specified in the text of the use case's event flow.

- Automatic Time-Out – if a session is inactive for 15 minutes, the system will logout the user; unsaved work is lost.
- None

Basic Flow of Events

Table 9-3: Process Case

Step	Actor Action	Step	System Action
		1	System Displays the Main Menu
2	User selects Open Case	3	System Displays Search Criteria Page
4	User enters search criteria	5	System searches the database and displays matching record
6	The User selects the desired record	7	System Displays the Journal Page.
8	User enters the military service verification received from an external source, indicates that enough information has been received to determine and declare eligibility and saves the Journal entry.	9	The System saves and displays the Journal record. The System displays the option to return to the main menu or log out.

Step	Actor Action	Step	System Action
10	The user logs out.	11	The system closes the application. This use case ends when the case records are saved and the application is closed.

B.3. Use Case: View/Update Case

Brief Description

This section describes the workflow and business rules for a user to View/Update case information in EOAS.

Use Case Trigger

User selects Open Case from EOAS Main Menu.

Use Case Actors

- Eligibility Case Manager
- Eligibility Supervisor

Preconditions

- Use must have permission to view and update a case.
- Duplicate Search must returns a matching record.

Basic Flow of Events

Table 9-4: View/Update Case

Step	Actor Action	Step	System Action
		1	System displays Search page and searchable criteria.
2	The User Enters search criteria and initiates the search.	3	The system searches for and displays record(s) that match entered criteria.
4	User selects the desired record	5	The System displays the Journal page of the selected record.
6			

Alternative Flow of Events

There is not an alternate flow.

Appendix C: Alternate Flows

This section will contain alternate flows that are specified within each use case. The Following are possible examples, but will require collaboration with business partners.

C.1. Alternative Flow: Login – Login Attempt Fails

Table 9-5: Login-Alternate Flow: Unsuccessful Attempt

Step	Actor Action	Step	System Action
3	This use case begins at Login step 3: User enters login credentials	4	The system displays unsuccessful login attempt, and prompts the user to re-enter credentials.
5	This use case ends when user has successfully entered the EOAS home page. <i>Alternate Flow: Password Re-set</i>		

Appendix D Acronym List and Glossary

This section provides the definitions of important terms, acronyms, and abbreviations used in this Requirements Specification Document.

Table 9-6: Acronyms

Term	Meaning
BOSS	Burial Operations Support System
BRD	Business Requirements Division
CR	Change Request
ECF	Eligibility Coordination Form
EO	Eligibility Office
EOA	Eligibility Office Automation
EOAS	Eligibility Office Automation System
FBI	Federal Bureau of Investigation
GUI	Graphical User Interface
MPD	Memorial Products Division
NCA	National Cemetery Administration
NCSO	National Cemetery Scheduling Office
QITC	Quantico Information Technology Center
VBA	Veterans Benefits Administration
VMS	Verification of Military Service

The following table lists and defines terms used throughout this document.

Table 9-7: Glossary

Term	Meaning
BOSS Enterprise	The overarching IT systems used by NCA for burial operations and supporting activities
BOSS User(s)	The NCSO Schedulers and National Cemetery Representatives.
EOAS User(s)	The EO Case Managers and the Site Managers.
NCSO Team Lead	The NCSO Team Leads with access to the EOAS.
Feith Scanning System	An on-line document database (commercial off the shelf product) which allows for the management of scanned document. http://www.feith.com/

Term	Meaning
SHARE	A system that allows access to multiple data sources located on different databases. Sources include Beneficiary Inquiry Records Locator System (BIRLS), Compensation and Pension (C&P) Master Records, Pending Issue File (PIF), Payment History File (PHF), Corporate database, Social Security Administration, and COVERS records
User	All individuals with access to the EOAS.