

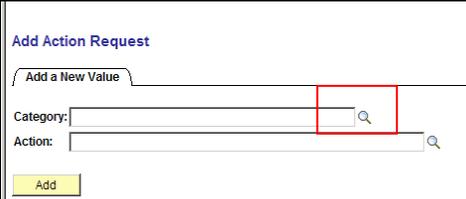
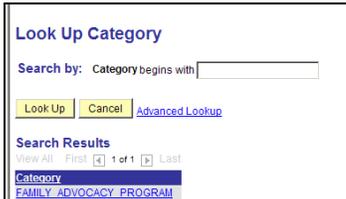
How to use the Action Request Page with the AWE

Role: Initiator

Use When there is an incident that requires information to be routed to another user with and without a form, the Action Request Page along with the Approval Workflow Engine (AWE) will be utilized in Direct Access.

The initiator will take the following actions:

- Pages**
- **Incident Component > People page** = Generate Forms (*optional*)
 - **Action Request Page**
 - Category – Select the Work Life Program
 - Actions – Specific to each Work Life Program

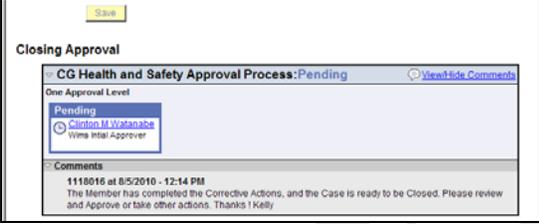
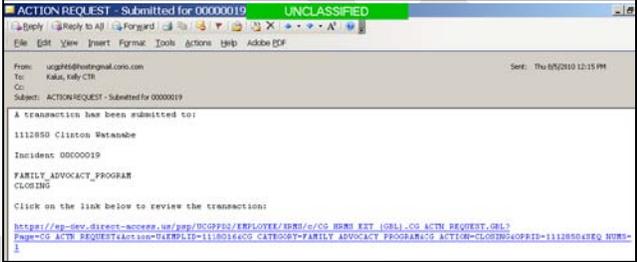
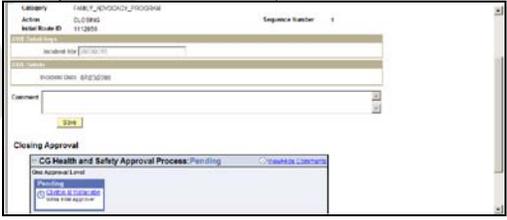
Step	Action
1	<p>From the Portal, select the hyperlink Add Action Request to initiate the request.</p> <div style="border: 1px solid black; padding: 5px; margin: 10px auto; width: fit-content;">  </div>
2	<p>On the Add Action Request page, select the Worklife Program (Category) and the Actions that are applicable:</p> <ul style="list-style-type: none"> • Click on the magnifying glass icon to select the Category (Work Life Program). • In the Search by box, type the first word or few letters of the Work Life Program. • Click Look Up. <div style="display: flex; justify-content: space-around; margin: 10px 0;"> <div style="border: 1px solid black; padding: 5px; width: 45%;">  </div> <div style="border: 1px solid black; padding: 5px; width: 45%;">  </div> </div> <ul style="list-style-type: none"> • Select the desired Work Life Program by clicking the hyperlink. <p><i>(Note: If you do not see the Work Life Program, then contact your security administrator for the proper roles and permissions)</i></p>

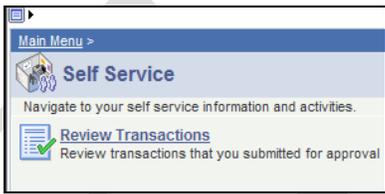
Step	Action				
3	<p data-bbox="399 262 1304 298">On the Add Action Request page, do the following to add the Action:</p> <div data-bbox="591 331 1122 554" style="border: 1px solid black; padding: 5px; margin: 10px 0;"> <p data-bbox="602 352 764 373">Add Action Request</p> <p data-bbox="602 394 732 415">Add a New Value</p> <p data-bbox="602 436 1015 457">Category: FAMILY_ADVOCACY_PROGRAM <input style="width: 150px;" type="text" value="FAMILY_ADVOCACY_PROGRAM"/> <input type="button" value="Q"/></p> <p data-bbox="602 468 1089 489">Action: <input style="width: 150px;" type="text" value=""/> <input type="button" value="Q"/></p> <p data-bbox="602 510 683 531"><input type="button" value="Add"/></p> </div> <ul style="list-style-type: none"> <li data-bbox="448 596 1235 663">• Click on the magnification glass icon to select the Action. Actions are specific to each Work Life Program. <p data-bbox="399 705 1295 741">Chose the action by clicking on the hyperlink for the desired program.</p> <div data-bbox="662 772 1052 1094" style="border: 1px solid black; padding: 5px; margin: 10px 0;"> <p data-bbox="673 804 836 825">Look Up Action</p> <p data-bbox="673 846 1044 867">Search by: Action begins with <input style="width: 80px;" type="text" value=""/></p> <p data-bbox="673 898 943 930"><input type="button" value="Look Up"/> <input type="button" value="Cancel"/> Advanced Lookup</p> <p data-bbox="673 951 797 972">Search Results</p> <p data-bbox="673 972 898 993">View All First <input type="button" value="◀"/> 1-3 of 3 <input type="button" value="▶"/> Last</p> <table border="1" data-bbox="673 993 898 1077"> <tr><td>Action</td></tr> <tr><td>CLOSING</td></tr> <tr><td>DETERMINATION</td></tr> <tr><td>TRANSFER</td></tr> </table> </div> <div data-bbox="591 1167 1122 1381" style="border: 1px solid black; padding: 5px; margin: 10px 0;"> <p data-bbox="602 1188 764 1209">Add Action Request</p> <p data-bbox="602 1230 732 1251">Add a New Value</p> <p data-bbox="602 1272 1015 1293">Category: FAMILY_ADVOCACY_PROGRAM <input style="width: 150px;" type="text" value="FAMILY_ADVOCACY_PROGRAM"/> <input type="button" value="Q"/></p> <p data-bbox="602 1304 1089 1325">Action: CLOSING <input style="width: 150px;" type="text" value="CLOSING"/> <input type="button" value="Q"/></p> <p data-bbox="602 1346 683 1367"><input type="button" value="Add"/></p> </div> <ul style="list-style-type: none"> <li data-bbox="448 1423 808 1459">• Click on the Add button 	Action	CLOSING	DETERMINATION	TRANSFER
Action					
CLOSING					
DETERMINATION					
TRANSFER					

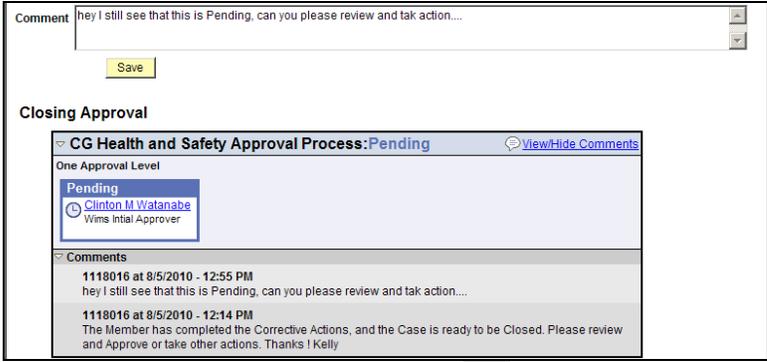
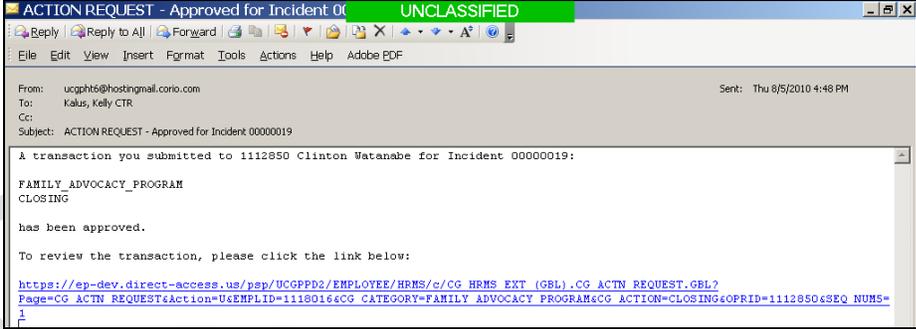
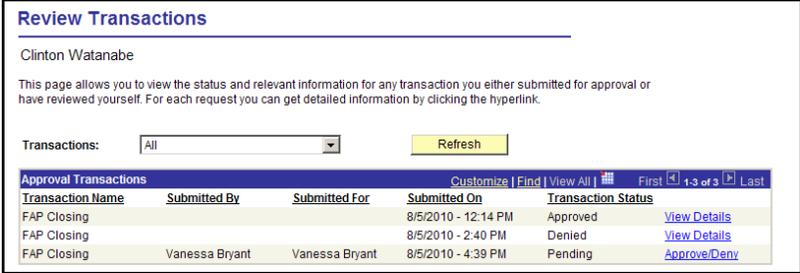
Step	Action																																																							
4	<p>To select the approver, complete the following fields:</p> <ul style="list-style-type: none"> Initial Route ID - Select the magnifying glass icon and select an approver from the presented list. <div data-bbox="509 445 1203 785" data-label="Form"> </div> <p>If the person you wish to route the action is not on the list contact your security administrator. If they are, continue by selecting the User ID hyperlink for the approver.</p> <div data-bbox="449 968 1265 1209" data-label="Form"> <table border="1"> <thead> <tr> <th>User ID</th> <th>EmpID</th> <th>EmpI Rcd Nbr</th> <th>Business Unit Name</th> <th>Last Name</th> <th>First Name</th> <th>Employee Classification</th> <th>Payroll Status</th> <th>Company</th> <th>Department</th> <th>Job Code</th> </tr> </thead> <tbody> <tr> <td>1089208</td> <td>1089208</td> <td>0</td> <td>OFECCG</td> <td>James Green</td> <td>GREEN</td> <td>JAMES Q</td> <td>Ret w/Pay</td> <td>ACG</td> <td>003333</td> <td>000098</td> </tr> <tr> <td>1089208</td> <td>1089208</td> <td>1</td> <td>CIVCG</td> <td>James Green</td> <td>GREEN</td> <td>JAMES CIV</td> <td>Active</td> <td>ACG</td> <td>010335</td> <td>630088</td> </tr> <tr> <td>1112850</td> <td>1112850</td> <td>0</td> <td>CIVCG</td> <td>Clinton Watanabe</td> <td>WATANABE</td> <td>CLINTON CIV</td> <td>Active</td> <td>ACG</td> <td>010346</td> <td>630087</td> </tr> <tr> <td>2021861</td> <td>2021861</td> <td>0</td> <td>CIVCG</td> <td>Laurel Shuster Jarvis</td> <td>SHUSTERJARVIS</td> <td>LAUREL CIV</td> <td>Active</td> <td>ACG</td> <td>007970</td> <td>630085</td> </tr> </tbody> </table> </div>	User ID	EmpID	EmpI Rcd Nbr	Business Unit Name	Last Name	First Name	Employee Classification	Payroll Status	Company	Department	Job Code	1089208	1089208	0	OFECCG	James Green	GREEN	JAMES Q	Ret w/Pay	ACG	003333	000098	1089208	1089208	1	CIVCG	James Green	GREEN	JAMES CIV	Active	ACG	010335	630088	1112850	1112850	0	CIVCG	Clinton Watanabe	WATANABE	CLINTON CIV	Active	ACG	010346	630087	2021861	2021861	0	CIVCG	Laurel Shuster Jarvis	SHUSTERJARVIS	LAUREL CIV	Active	ACG	007970	630085
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Step	Action																
5	<p>Select the associated incident for the Action Request:</p> <div data-bbox="570 296 1170 594" data-label="Form"> <p>The screenshot shows a web form titled "Action Request Page - Prototype" with a sub-header "Submit Action Request". It contains several input fields: "EmpID" (1118016), "Name", "Category" (FAMILY_ADVOCACY_PROGRAM), "Action" (CLOSING), "Initial Route ID" (1112850), and "Incident Nbr". There are also buttons for "Get Details" and "Save".</p> </div> <ul style="list-style-type: none"> Incident Nbr – Either type in the incident number or select the magnifying glass icon and select the desired Incident number from the presented list. <div data-bbox="615 779 1122 1186" data-label="Form"> <p>The screenshot shows a dialog box titled "Look Up Incident Nbr". It has a search field with the text "Search by: Incident Number begins with". Below the search field are buttons for "Look Up", "Cancel", and "Advanced Lookup". Underneath is a "Search Results" section with a table of incident numbers and dates.</p> <table border="1"> <thead> <tr> <th>Incident Number</th> <th>Incident Date</th> </tr> </thead> <tbody> <tr> <td>00000019</td> <td>07/23/2008</td> </tr> <tr> <td>00000840</td> <td>09/26/2008</td> </tr> <tr> <td>00009808</td> <td>04/23/2008</td> </tr> <tr> <td>00010548</td> <td>01/11/1994</td> </tr> <tr> <td>00014333</td> <td>01/17/2001</td> </tr> <tr> <td>00014734</td> <td>11/13/2001</td> </tr> <tr> <td>00015131</td> <td>10/18/2002</td> </tr> </tbody> </table> </div> <ul style="list-style-type: none"> Select the Incident Number hyperlink. If the Incident is not on the list that is presented or you don't have the incident number, return to the instructions on "How To Add an Incident" to either add an incident or search for the incident number related to the action you wish to perform. 	Incident Number	Incident Date	00000019	07/23/2008	00000840	09/26/2008	00009808	04/23/2008	00010548	01/11/1994	00014333	01/17/2001	00014734	11/13/2001	00015131	10/18/2002
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00014333	01/17/2001																
00014734	11/13/2001																
00015131	10/18/2002																

Step	Action
6	<ul style="list-style-type: none"> • After entering the Incident Nbr, click the Get Details Button to automatically populate the AWE Details. • Enter any Comments you wish to send to the approver in the Comment window. • Add Attachment (if applicable): Select the Add Attachment hyperlink (refer to <i>Step 1, Form Generation</i>). <p><i>Note: Not all Actions will have the capability to Add Attachments.</i></p> <div data-bbox="597 562 1222 720" data-label="Image"> </div> <div data-bbox="511 758 1242 1125" data-label="Image"> </div> <ul style="list-style-type: none"> • Click on the Save button.

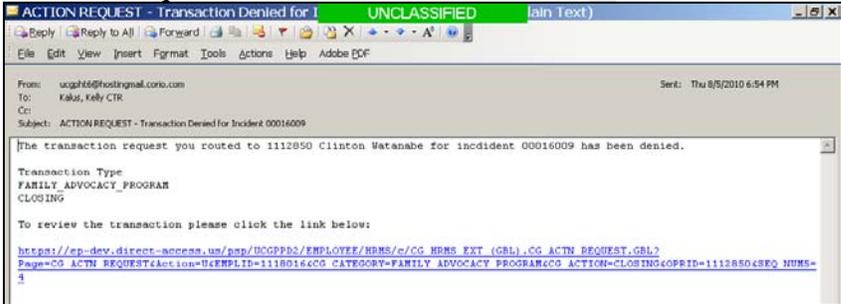
Step	Action
7	<p>After the system finishes processing, the following changes will occur:</p> <ul style="list-style-type: none"> <p>The CG Health and Safety Approval Process window appears at the bottom of the page with a box displaying the approver Name and that it is in the “Pending” stage.</p>  <p>The initiator will receive an automatically generated email to confirming their submission.</p>  <p>To review the status of the Action when you receive the email. Simply click on the hyperlink in the email (also refer to Step 11 to Review Transactions).</p> <p><i>Note: If you are not logged into Direct Access, you will be taken to the log in screen first, then directly to the transaction.</i></p>  <p>The approver will be sent an email to review and take the necessary actions (<i>Approve/Deny/Push Back</i>).</p> 

Step	Action															
8	<p>The initiator can Review Transactions by navigating to Self Service</p> <div style="text-align: center;">  </div> <div style="display: flex; justify-content: space-around; margin-top: 20px;"> <div style="border: 1px solid black; padding: 5px; width: 45%;">  </div> <div style="border: 1px solid black; padding: 5px; width: 45%;">  </div> </div> <ul style="list-style-type: none"> • Click on the Review Transactions hyperlink <p>On the Review Transaction page, select the drop down list to review the Transactions. The options are:</p> <ul style="list-style-type: none"> ➤ All ➤ I have approved ➤ I have denied ➤ I have submitted <p>Click the Refresh button and the results will appear:</p> <p>Click on the View Details hyperlink next to a Transaction you wish to review.</p> <div style="border: 1px solid black; padding: 10px; margin-top: 20px;"> <p>Review Transactions</p> <p>This page allows you to view the status and relevant information for any transaction you either submitted for approval or have reviewed yourself. For each request you can get detailed information by clicking the hyperlink.</p> <p>Transactions: <input type="text" value="All"/> <input type="button" value="Refresh"/></p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th colspan="5" style="text-align: right;">Approval Transactions</th> </tr> <tr> <th style="text-align: left;">Transaction Name</th> <th style="text-align: left;">Submitted By</th> <th style="text-align: left;">Submitted For</th> <th style="text-align: left;">Submitted On</th> <th style="text-align: left;">Transaction Status</th> </tr> </thead> <tbody> <tr> <td>FAP Closing</td> <td></td> <td></td> <td>8/5/2010 - 12:14 PM</td> <td>Pending View Details</td> </tr> </tbody> </table> </div>	Approval Transactions					Transaction Name	Submitted By	Submitted For	Submitted On	Transaction Status	FAP Closing			8/5/2010 - 12:14 PM	Pending View Details
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Step	Action
9	<ul style="list-style-type: none"> To add more information and comments on a “Pending” action for the approver to review do the following: Type the additional Comment in the box, and click Save. To review Comments, click on the View/Hide Comments hyperlink. 
10	<p>Upon <i>Approval</i>, an email will be sent to the initiator.</p>  <p>To review, click on the hyperlink in the email, or follow previous Step # 8 to Review Transactions.</p> 

Step	Action
10	<p>After the Approval, the Incident will be automatically updated on the Incident page as follows:</p> <ul style="list-style-type: none"> Action = Closing: A Date Closed will be auto updated and removes the Assignment Flag. <p style="text-align: center;"><i>Navigation: Manage Case > Enter Incident # > Search</i></p> <div data-bbox="440 512 1273 963" style="border: 1px solid black; padding: 5px;"> <p>The screenshot shows the 'Claim Details' form. The 'Date Closed' field is highlighted with a red box and contains the value '08/05/2010'. Other fields include Claim Number (00095288), Date Opened (10/18/2002), Status (Approved), Person Filing (James Dixon, EmpID: 1085922), Incident Data (Incident Number: 00015131, Incident Date: 10/18/2002, Type: Family Adv), and Country (USA). Buttons at the bottom include Save, Return to Search, Notify, Add, and Update/Display.</p> </div> <ul style="list-style-type: none"> Action = Transfer: The Reported By Emplid will be populated with the new “case” worker. <p style="text-align: center;"><i>Navigation: Incident Details > Incident # > Search > Notification page</i></p> <div data-bbox="430 1144 1284 1604" style="border: 1px solid black; padding: 5px;"> <p>The screenshot shows the 'Incident Notification' form. The 'Reported By Emplid' field is highlighted with a red box and contains the value '1182540' and the name 'FELICE ROTH'. Other fields include Incident Number (00020057), Date (08/20/2009), Description (Family Advocacy), Date Reported (10/23/2009), and Date Recorded (11/24/2009). Buttons at the bottom include Save, Return to Search, Previous in List, Next in List, Notify, Add, and Update/Display.</p> </div> <p>Note: Substance Abuse Program (only): Once the originating CDAR, the initiator, has transferred the incident and it is approved, the initiator will no longer have access to the incident.</p>

Step	Action
11	<p>The following will occur if the approver performs a Push Back on an Action Request:</p> <div data-bbox="453 369 1256 651" data-label="Image"> <p>The screenshot shows an email interface with the following content: From: ucghhh@hondingmail.com To: Kaku, Kelly CTR Subject: ACTION REQUEST - Pushback for incident 00016009 A transaction you submitted to 1112850 Clinton Watanabe for incident 00016009 has been pushed back to you for revision. Transaction Type FAMILY ADVOCACY PROGRAM CLOSING To review this transaction, please click the link below: https://eq-dev.direct-annex.us/gsp/UCOPPE2/EMPLOYEE/HRMS/e/CG_HRMS_EXT_(GEL)_CG_ACTN_REQUEST.GEL?Page=CG_ACTN_REQUEST&action=RCENPLD-1118016&CG_CATEGORY-FAMILY_ADVOCACY_PROGRAM&CG_ACTION-CLOSING&OPRID=1112850&REQ_NUM=4</p> </div> <ul style="list-style-type: none"> • Click on the hyperlink in the email, or Review Transactions (Refer to Step 8) to review. • Provide additional information by typing in the Comment box. • Click on the Resubmit button. <div data-bbox="493 873 1219 1283" data-label="Image"> <p>The screenshot shows the 'AWE Details' page for Incident Nbr 00016009. The 'Closing Approval' section shows the status as 'Awaiting Further Approvals'. Under 'One Approval Level', there is an 'On Hold' status with a card for Clinton M. Watanabe, Wms Intial Approver, dated 8/5/2010 - 5:56 PM. Below it is an 'Information Request' card for Montgomery, Simone S.</p> </div> <ul style="list-style-type: none"> • After resubmitting, the status is “Pending” – refer to Steps 7 and 10. <div data-bbox="521 1356 1190 1688" data-label="Image"> <p>The screenshot shows the 'AWE Detail Keys' and 'AWE Details' sections. The 'Closing Approval' section now shows the status as 'Pending' with a card for Clinton M. Watanabe, Wms Intial Approver.</p> </div>

Step	Action
12	<p>The following will occur if the approver performs a Deny on an Action Request:</p> <ul style="list-style-type: none"> The initiator will receive an auto generated email and in their Review Transactions informing them of them that the Action Request has been denied. <p style="text-align: center;">Note: The initiator will not be able to Resubmit the request, and instead would be required to initiate a <i>new</i> Action Request.</p>  <ul style="list-style-type: none"> Click on the hyperlink in the email to review the Action, Comments, and Comment History. Refer to Step 8 to Review Transactions. 