

# eCASE

Reasonable  
Accommodations

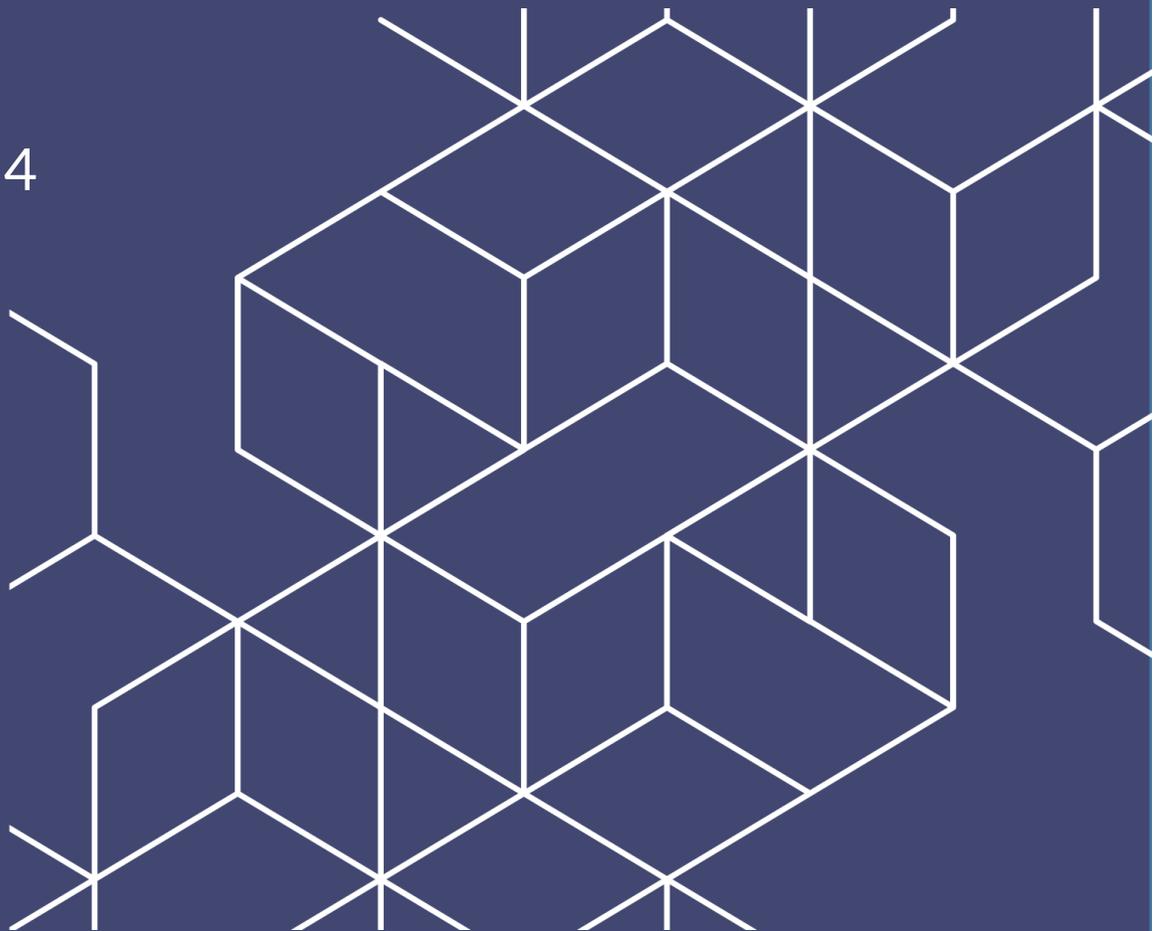


# User Manual

Version 1.2

v4.0.0

April 2024



# RA v4.0.0 User Manual

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# Version History

Version	Date	Revision Summary
3.2.0	11/17/2023	<p>We've added or revised the following for v3.2.0:</p> <ul style="list-style-type: none"><li>▪ Updated the <i>User Interface</i> section (2.2) to show the new Time Sensitive Accommodation column. When a Requester indicates that a request is time-sensitive on the Portal, it will display in RA.</li><li>▪ Edited the <i>RA Inquiry Tab</i> section (3.1) to show the new Employee Type drop-down menu included in the form. This field is dependent on the environment's configuration and may not be visible for all users.</li></ul>
4.0.0	4/19/2024	<p>We've added or revised the following for v4.0.0:</p> <ul style="list-style-type: none"><li>▪ Updated screenshots throughout to reflect new Role terminology.</li><li>▪ Updated the <i>Reasonable Accommodations Case Folder Interface</i> section (3) to include new tab titles, Role terminology, and appearance.</li><li>▪ Added the <i>RA Configuration</i> section (7), which contains an overview of RA configuration as well as a brief explanation of the functionality within each tab.</li></ul>

## Using This Manual

The following formatting conventions are used in this manual to highlight important information:

- *Italicized* text indicates a location, for example a particular *Folder*, *Tab*, or *Window*.
- **Bold** text indicates a specific user action, such as clicking a **button**.
- **Red** text are used in Notes to **bring attention to crucial information**.



# 1 RA Introduction

## 1.1 About eCASE RA

Reasonable Accommodations is an eCASE application paired with a public facing portal which allows users to submit Reasonable Accommodations (RA) requests. An RA Request is a request for materials, software, transportation, or other assistance, allowing the user to perform their job responsibilities more easily. The portal is internal to your organization, and the eCASE backend is limited to a set number of users who adjudicate the request, accept, or decline the request, and move an accepted request through to completion. Anyone within your organization can submit a RA request. Additionally, there are several forms that employees can submit, including an RA Request, an RA Inquiry, and an RA Modification. These forms are covered in depth in a later section of this document.

## 1.2 About this Manual

In this manual, the following topics are discussed:

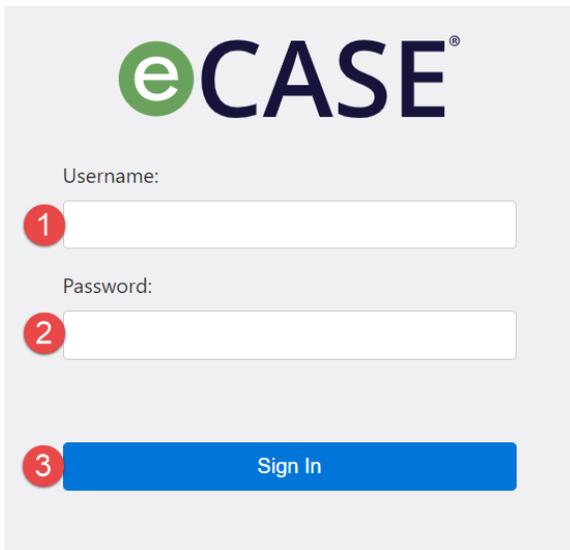
- *Getting Started*: This section guides users through the first eCASE elements they encounter.
- *Reasonable Accommodations Case Folder Interface*: Here we discuss the tabs that comprise the Reasonable Accommodations Case Folder.
- *Working with Inquiries*: This subsection instructs RA users on receiving and processing portal submitted RA Inquiries.
- *Working with Reasonable Accommodation Files*: Here we discuss the Reasonable Accommodation User Interface (UI) and Workflow.
- *RA Modifications*: Here we discuss the RA Modification case type, and how it differs from a standard RA request.
- *RA Configuration*: This section outlines the configuration options available in the RA Configuration folder.



## 2 Getting Started

### 2.1 Login

To log in to eCASE, navigate to the *eCASE Login* screen. Your system administrator will provide you a hyperlink to access the *eCASE Login* screen. Enter your **(1) Username** and **(2) Password** in the Login screen and click **(3) Sign In**.



The screenshot shows the eCASE login interface. At the top is the eCASE logo. Below it, the text 'Username:' is followed by a white input field with a red circle containing the number '1' to its left. Below that, the text 'Password:' is followed by another white input field with a red circle containing the number '2' to its left. At the bottom, there is a blue button labeled 'Sign In' with a red circle containing the number '3' to its left.

After login, the *eCASE Homepage* appears. The system automatically opens the module users have currently have access to. If a user has access to multiple modules, the system opens the module most recently accessed. The eCASE Homepage is annotated in the following subsection.

### 2.2 User Interface

The Reasonable Accommodations solution is built on the core eCASE platform that supports multiple powerful task management solutions. Therefore, it shares certain elements of the basic eCASE platform that is familiar if you have used any other eCASE-based tools. An example of the eCASE UI is shown below:



## Getting Started

The screenshot shows the eCASE application interface. The top navigation bar includes the eCASE logo, the text 'Reasonable Accommodation', a 'Contacts' dropdown menu, a search bar, and user profile icons. A sidebar on the left contains a 'Main Menu' with options: Main Menu, Inbox, Contacts, Reports, Mass Mailing, and Settings. The main content area is divided into two sections: 'Cases Assigned to Me' and 'Cases in Queue'. The 'Cases Assigned to Me' section contains a table with two rows of case data. The 'Cases in Queue' section is currently empty, displaying 'No records to display.' A 'Favorites' section is visible on the right side of the interface.

Office	Folder ID	Case Type	Task Assigned Date	Task Due Date	Task Name	Folder Status	Employee Name	Time-Sensitive Accommodation
HQ	2022-IQR-00003	RA Inquiry	2/21/2023 2:37:08 PM	3/2/2023 2:37:08 PM	Resolve and Close	In Progress	Test Contact	
HQ	2022-RAF-00583	RA File	10/26/2023 1:21:26 PM	11/6/2023 1:21:26 PM	Send Notifications to Employee and Supervisor	In Progress	Russell Miller	Yes

Office	Folder ID	Case Type	Task Assigned Date	Task Due Date	Task Name	Folder Status	Employee Name	Time-Sensitive Accommodation
No records to display.								

**Note:** The image above is provided as a sample and some aspects may not reflect your specific eCASE environment.

There are four primary areas on the landing page:

The **(A) Launch Pad** and **(B) Quick Search Bar** are standard parts of the eCASE UI and remain static across all pages in the application. No matter what the user is doing within the eCASE system, these portions of the screen are always available.

The **(C) Dashboard** provides module-specific information for easy access and visibility when first logging in to the application. It also logically separates information relevant to the user's role. The Dashboard contains the *Cases Assigned to Me* and *Cases in Queue* inboxes. The *Cases Assigned to Me* inbox displays cases with an active workflow where the next step has been assigned to you. The *Cases in Queue* inbox shows forms submitted from the portal that are ready to be assigned.

Finally, the **(D) Profile** menu allows you to access your user profile (which includes the logout option).

## 2.3 Roles

eCASE features predetermined user roles, with permissions restricting what features the user has access to. User level permissions are the basic permissions level, and these users do not have any creation or approval permissions.



# 3 Reasonable Accommodations Case Folder Interface

The following subsections describe the RA tabs and their functionality.

**Note: RA tab titles can be configured, so the name that appears in your environment may vary, but functionality is the same.**

## 3.1 RA Inquiry Tab

The *RA Inquiry Form* tab contains the details provided by the portal user when they submitted a Reasonable Accommodations Inquiry. This information is presented here for reference but cannot be edited. Note, this tab only appears under *RA Inquiry* cases.

RA Inquiry Form					Assignments	Attachments	Case Notes	Portal Messages	Portal Forms
Initiating Office : OPX HQ - Opexus HQ					Folder Owner : System Account				
Required fields are indicated with asterisk (*) and red outline.									
<b>Reasonable Accommodation Inquiry</b>									
Control Number 2024-IQR-00011	FY 2024	Received Mode eCase			Received Date: 04/16/2024	Closed Date: mm/dd/yyyy			
Employee Name * Shannon Murphy					Organizational Office * Office of the Chair (OCH)				
District * New York District					Geographic Office * New York District Office				
Grade * 13		Series GS-0318		Step 07					
Telephone Number * (555) 555-5555					Email Address * shannon.murphy@opexustech.com				
Employee Type									
Supervisor Name John Doe					Supervisor Email				
Supervisor's Telephone Number (555) 555-5555									

## 3.2 Intake Form Tab

The *Intake Form* tab appears for RA Requests received from the portal. Most of the information on this tab reflects the details provided by the portal user and cannot be edited.



Notable areas on this tab include the **(A) Action** button, which is **Send Notification** in the example below. The Action button will change depending on the current task and directs users on next steps to process this request. There is also a **(B) Case Status** drop-down, where an updated Case Status can be selected. The status you select from the *Case Status* drop down will also reflect in the *Case Status* column on the portal.

Intake Form	Resolution Form	Information Reporting	Post Case Processing	Attachments	Assignments	Case Notes	Portal Messages	Portal Forms
-------------	-----------------	-----------------------	----------------------	-------------	-------------	------------	-----------------	--------------

Initiating Office : [OPX HQ - Opexus HQ](#) Folder Owner : [System Account](#)

Required fields are indicated with asterisk (\*) and red outline.

CONFIRMATION OF REQUEST FOR REASONABLE ACCOMMODATION				
<b>Reasonable Accommodation Coordinator</b> "Read Only - To be filled by System"		Case Status: <input type="text" value=""/> <b>B</b>	<input type="button" value="Send Notification"/> <b>A</b>	
RA Control Number: 2024-RAF-00048	FY 2024	Received Mode eCase	Received Date: 04/16/2024	Closed Date: mm/dd/yyyy
Employee Information				
Employee Name * <input type="text" value="Shannon Murphy"/> X		Organizational Office * Office of the Chair (OCH)		
District * New York District		Geographic Office * New York District Office		
Grade * 13	Series GS-0318	Step 07		

### 3.3 Resolution Form Tab

The *Resolution Form* tab is used to capture the agency's determination as well as the resolution details for this request. This tab only becomes available after a user is assigned to the case. An example tab is shown below, with the major areas highlighted.



## Reasonable Accommodations Case Folder Interface

<a href="#">Home</a>	<a href="#">Resolution Form</a>	<a href="#">Information Reporting</a>	<a href="#">Post Case Processing</a>	<a href="#">Attachments</a>	<a href="#">Assignments</a>	<a href="#">Case Notes</a>	<a href="#">Portal Messages</a>	<a href="#">Portal Forms</a>
----------------------	---------------------------------	---------------------------------------	--------------------------------------	-----------------------------	-----------------------------	----------------------------	---------------------------------	------------------------------

Required fields are indicated with asterisk (\*) and red outline.

RESOLUTION OF REASONABLE ACCOMMODATION REQUEST

<b>Reasonable Accommodation Coordinator</b> "Read Only - To be filled by System"		Case Status: <input type="text"/>	<a href="#">Send Notification</a>
RA Control Number: 2024-RAF-00048	FY: <input type="text" value="2024"/>	Received Mode: <input type="text" value="eCase"/>	Received Date: <input type="text" value="04/16/2024"/>
			Closed Date: <input type="text" value="mm/dd/yyyy"/>

Employee Information

Employee Name * <input type="text" value="Shannon Murphy"/>	Accommodation(s): * <input type="checkbox"/> Approved as specifically requested test * <input type="checkbox"/> Approved but different from original request test * <input type="checkbox"/> Denied test * <input type="checkbox"/> Withdrawn *
Reasonable Accommodation Request * <input type="text" value="Computer Equipment"/>	

Date accommodation(s) granted/denied <input type="text" value="mm/dd/yyyy"/>	Date form given to applicant/employee <input type="text" value="mm/dd/yyyy"/>	If accommodation(s) granted date to be provided <input type="text" value="mm/dd/yyyy"/>
Length of time accommodation is granted <input type="text"/>	Disability Determination <input type="checkbox"/> RAC determined requester has a disability <input type="checkbox"/> RAC determined requester does not have a disability	

If the deciding official offered an accommodation that is different from the one originally requested, explain (a) the reasons for the denial of the accommodation originally requested; and (b) why the alternative accommodation would be effective.

An individual who disagrees with the resolution of the request may ask the Director of the Office of Human Resources to reconsider that decision within 10 business days of receiving the "Resolution" form. Note that requesting reconsideration does not extend the time limits for initiating administrative, statutory, or collective bargaining claims.

If you are dissatisfied with the resolution and wish to pursue administrative, statutory, or collective bargaining rights, you must take the following steps:

- For an EEO complaint pursuant to 29 C.F.R. d1614, contact an EEO official within the Office of Diversity and Inclusion [within 45 days from the date of receipt of this form or a verbal response \(whichever comes first\)](#).
- For a collective bargaining claim, file a written grievance in accordance with the provisions of NSF's Collective Bargaining Agreement.
- For adverse actions over which the Merit Systems Protection Board (MSPB) has jurisdiction, initiate an appeal to the MSPB [within 30 days of an appealable adverse action](#) as defined in 5 C.F.R. d1201.3.

[Click to sign Resolution Form](#)  
 Reasonable Accommodation Coordinator Signature

Under **(A) Accommodations**, you can make a determination about the request accommodation. See the *Approve or Deny Accommodations* section for details on each option. There are also field to capture **(B) additional details** about the accommodation (if granted). Provide as much data as possible in these fields. Finally, the **(C) Signature** field at the bottom of this form captures the approver signature on this determination. Use the **Click to sign form** button to sign a completed form.



## 3.4 Information Reporting Tab

The *Information Reporting* tab is used to capture important summary information about the RA case. Fields are available to capture information about the accommodations, dates throughout the process, note if medical information was requested (and why), and more as applicable for each request. An example form is shown below with annotations highlighting areas of interest on this tab:



## Reasonable Accommodations Case Folder Interface

Required fields are indicated with asterisk (\*) and red outline.

REASONABLE ACCOMMODATION INFORMATION REPORTING FORM				
Reasonable Accommodation Coordinator "Read Only - To be filled by System"		Case Status: [Dropdown]	Send Notification	
RA Control Number: 2024-RAF-00048	FY: 2024	Received Mode: eCase	Received Date: 04/16/2024	Closed Date: mm/dd/yyyy
Employee Information				
Employee Name * Shannon Murphy		Organizational Office * Office of the Chair (OCH)		
Accommodation(s) * <input type="checkbox"/> Approved as specifically requested test * <input type="checkbox"/> Approved but different from original request test * <input type="checkbox"/> Denied test *		Date Accommodation Requested 04/16/2024	Reasonable Accommodation Coordinator Signature	
Individual Disability: <input type="checkbox"/> Individual does not have a disability as defined by the Rehabilitation Act <input type="checkbox"/> Individual has a disability as defined by the Rehabilitation Act <input type="checkbox"/> No disability determination		Date accommodation request referred to RAC, if applicable mm/dd/yyyy	Date Accommodation Approved or Denied mm/dd/yyyy	
If time frames outlined in the Procedures were not met, please explain why.		Date Accommodation Provided (if different from date approved) mm/dd/yyyy		
Job held or desired by individual requesting reasonable accommodation (including occupational series, grade level, and office)		Accommodation needed for: <input type="checkbox"/> Application Process <input type="checkbox"/> Performing Job Functions or Accessing the Work Environment <input type="checkbox"/> Accessing a Benefit or Privilege of Employment (e.g., attending a training program or social event)		
Reasonable Accommodation Request * Computer Equipment		Accommodation(s) approved (if different from what was requested)		
Did requestor accept/reject some/all of the alternative accommodations offered? What reason(s) did the requestor give for the rejection(s)?		Accommodation(s) provided (if different from what was approved)		
Cost to EEOC of accommodation provided		Was medical information required to process this request? <input type="radio"/> Yes <input type="radio"/> No		
Sources of technical assistance, if any, consulted in trying to identify possible reasonable accommodations (e.g., Job Accommodation Network, disability organization) *		Comments		
Click to sign Information Reporting Form		Reasonable Accommodation Coordinator Signature		
		Date mm/dd/yyyy		

**A.** Some fields, including the *Accommodations and Date Accommodations Requested*, are imported from the *Intake Form* tab and cannot be edited.

**B.** The editable fields help provide necessary details about how the request was implemented. These are a mix of free text, checkboxes, and date selection fields.

**C.** If you select **Yes** under *Was medical information required to process this request?* additional fields appear. You'll be required to *Explain why* this was requested in the text field provided.

**D.** When the form is complete, use the **Click to sign form** to sign the completed form, then click **Save**.



### 3.5 Reconsideration

If a reconsideration for an accommodation decision is submitted by the requester, the Approver will take action on the *Reconsideration* tab. The tab will only appear on cases for which reconsiderations have been requested. An example tab is shown below:

Reconsideration Decision	
RAC response due date: (05/08/2024)	
Employee Name * John Gatewood	Employee Decision: <b>Reject and Request for Reconsideration</b>
Result of Reconsideration: * <input type="checkbox"/> Approved * <b>A</b> <input type="checkbox"/> Disapproved *	Date Reconsideration Requested 04/17/2024 Date Reconsideration Issued * mm/dd/yyyy <b>B</b>
<input type="checkbox"/> Click to sign Reconsideration Form <b>C</b>	
Approver Signature	Date decision made mm/dd/yyyy

On this tab, there are fields to capture the **(A) Result of Reconsideration** (either **Approved** or **Disapproved**) the **(B) Date Reconsideration Issued**, and a **(C) Signature** field to capture the user signature. See the *Reconsideration* section for additional details.

### 3.6 Post Case Processing Tab

The *Post Case Processing* tab is used, after the conclusion of the request, to capture the dates when RA processing work was completed. This information is used to validate that all steps in the RA process were completed in a timely manner.



## Reasonable Accommodations Case Folder Interface

Intake Form	Resolution Form	Information Reporting	Post Case Processing	Attachments	Assignments	Case Notes	Portal Messages	Portal Forms
Initiating Office : OPX HQ - Opexus HQ				Folder Owner : System Account				
<b>Post Case Processing Information</b>								
Date Initial Contact By RAC mm/dd/yyyy			Date Referred for Assessment/Vendor mm/dd/yyyy					
Date Assessment Report Received mm/dd/yyyy			Date Quote Requested mm/dd/yyyy					
Date Quote Received mm/dd/yyyy			Date Purchase Requested mm/dd/yyyy					
<b>Employee and Approver Response Deadline</b>								
Employee Response Due Date 04/30/2024				Approver Decision Response Due Date mm/dd/yyyy				

### 3.7 Attachments Tab

Attachments included as part of completing this case folder are managed within the *Attachments* tab. This tab includes a list of all attachments associated with the case, with options for adding, editing, and managing attachments.

Attachments are managed in the **(A)** *Attachments List* and are they are structured according to the *Attachment Type* (determined during upload/workflow step). The **(B)** *Actions menu* features actions you can perform in this tab, including using the **Add From** and **Add Child From** buttons to add parent and child attachments, respectively:

Attachments	Assignments	Case Notes	Portal Messages	Portal Forms									
<b>+ Add From</b>		<b>+ Add Child From</b>	<b>Edit</b>	<b>Manage</b>	<b>Send To</b>	<b>Filter</b>	<b>View</b>	Group By: Attachment Type					
<input type="checkbox"/>	Display Index	Content Source	Sensitivity	Description	Keywords	Comments	Name	Created	Created By	Modified	Modified By	Checked Out By	Size
<b>Attachment Type: Original</b>													
<input type="checkbox"/>	1.0						Sample doc.docx	05/30/2023 2:33:50 PM	Shannon Dpm	05/30/2023 2:33:50 PM	Shannon Dpm		2 MB

### 3.8 Assignments Tab

#### 3.8.1 About the Assignments Tab

The *Assignments* tab allows you to view the entire Case Folder Workflow, the current task in the workflow, and a history of actions on the workflow. Any tasks currently assigned to you are listed in the **(A)** *Tasks Assigned to Me* section, while the **(B)** *All Activities* section includes a



list of all activities in the Case Folder workflow, including the current *Status* and various assignment details. The *Linked Folders* workspace allows you to directly connect two related folders, permitting users to easily navigate between the two. Click the **Workflow Diagram** button to view the current stage of the case folder workflow.

**Tasks Assigned to Me**

Complete View Delegate

Task Name	Role Name	Assigned By	Assigned Date	Due Date	Status
Reconsider and complete 557c	CHCO	OPX HQ - System Account	05/30/2023	06/02/2023 12:00:00 AM	Assigned

Show: 20 1

**All Activities**

Workflow Diagram(k) Workflow History

Task Name	Role Name	Assigned By	Assigned To	Assigned Date	Due Date	Status
Send Notifications to Employee and Supervisor	DPM	OPX HQ - System	OPX HQ - Amy Sui	05/19/2023	05/30/2023 10:02:49	Completed

### 3.8.2 Tasks Assigned to Me

The *Tasks Assigned to Me* workspace displays any task(s) currently assigned to you, as shown in the following example:

**Tasks Assigned to Me**

Complete View Delegate

Task Name	Role Name	Assigned By	Assigned Date	Due Date	Status
Send Notifications to Employee and Supervisor	RAC	OPX HQ - System Account	04/16/2024	04/25/2024 11:54:07 AM	Assigned

Show: 20 1

You can take action on a task assigned to you by selecting it from the list and clicking **(A) Complete** to complete the task, **(B) View** to view the task details, or **(C) Delegate** the reassign the task to another eligible system user.

### 3.8.3 All Activities

The *All Activities* section lists all activities in the workflow, including the **(A) Status** of each step. There are also options to view a **(B) Workflow Diagram** (see the following subsection), or a **(C) Workflow History**:



## Reasonable Accommodations Case Folder Interface

All Activities

Workflow Diagram (B) Workflow History (C)

ID	Task Name	Role Name	Assigned By	Assigned To	Assigned Date	Due Date	Status
	Notify Facility of upcoming audit	Auditor	0515V - Randall Hamm	0515V - Randall Hamm	04/28/2021	5/28/2021 10:22:32 AM	Completed Early
	Conduct Audit/Add Findings	Auditor	0515V - Randall Hamm	0515V - Randall Hamm	04/28/2021		Completed
	Notify Facility No violations found	Auditor	0515V - Randall Hamm	0515V - Randall Hamm			Not Assigned

If you click **Workflow Diagram**, the full workflow appears in a new window. The step where this case folder is in the process is highlighted in red:

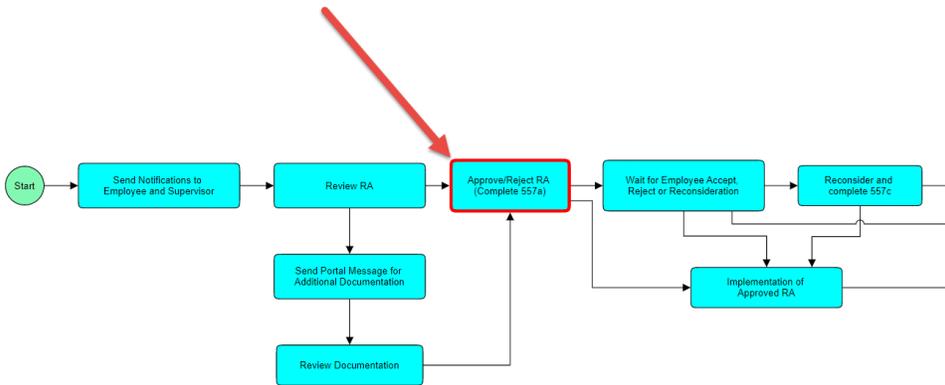
### Workflow Diagram

Current Case:

Approve/Reject RA (Complete 557a)

Assigned To:

123 - Dpm User



## 3.8.4 Linked Folders

The *Linked Folders* section contains a list of all RA folders that are linked to the current folder. For example, an RA Modification would be linked to the preceding RA File, which would be linked with the originating RA Inquiry. Linked cases are included in the (A) *Folders* list. There are also options to manually (B) **Link Folders**, or to select a linked folder from the list and take (C) **Linked Folder Actions**, including unlinking folders and viewing the Details Report:

Linked Folders (B) (C)

+ New Folders Link Folders Linked Folders Actions

Folders	Case Type	Office
2022-MODR-00003 (A)	RA Modification	OPX HQ - Opexus HQ

Show: 20



### 3.9 Case Notes Tab

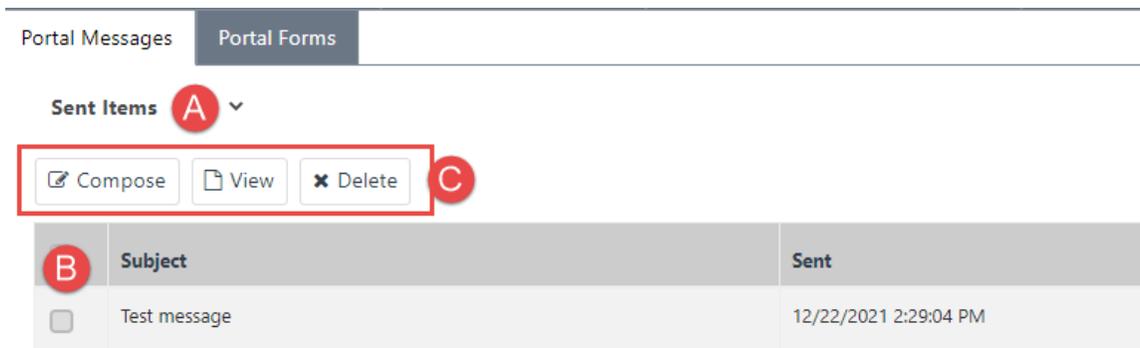
The *Case Notes* tab assists users when logging actions taken on this case folder. An example *Case Notes* tab is shown below:



Existing entries are logged on the **(A)** *Case Notes* list. Additionally, you can also take actions from the **(B)** *toolbar*, including adding entries, editing a selected entry, viewing attachments, or deleting a selected entry.

### 3.10 Portal Messages Tab

You can view messages sent to and received from the portal in the *Portal Messages* tab. Within this tab, there are options to view your **(A)** *Mailboxes*, including your *Inbox*, *Sent Items*, and *Deleted Items*. Items from the selected mailbox are displayed in the **(B)** *Message List*. You can select a message from the list, then use the **(C)** *Action* buttons to **View** or **Delete** the selected message. There is also the option to **Compose** a new message to the employee.



If you select **Compose**, the *Portal Message* screen appears as shown below. You are required to enter a *Subject* for the message. You can also add a *Due Date* for this action and compose the message in the *Message* field. You also have the option to add *Attachments* if needed.



## Reasonable Accommodations Case Folder Interface

### Portal Message

Note: \* fields are mandatory

Send To: Syed Nasir5

Subject\*:

Due Date:  

Message:



Type something

Attachments:

When your message is configured, click **Send** to send the message to the employee. This message then appears in the *Sent Items* mailbox.

## 3.11 Portal Forms Tab

You can view the forms submitted from the portal in read-only format from the *Portal Forms* tab. Select an item from the list and click **View Form** to view the form as submitted from the portal.

Actions Permissions Logs Discussions

Intake Form Resolution Form Information Reporting Post Case Processing Attachments Assignments Case Notes (1) Portal Messages Portal Forms

 View Form

Form Name	Status	Status Date
Form 557	ACCEPTED	04/16/2024 12:54:07 PM

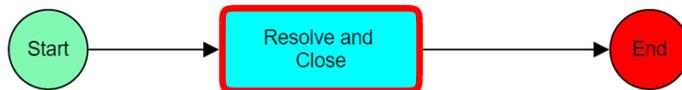
Show: 20



# 4 Working with Inquiries

## 4.1 Inquiry Workflow

The Inquiry Workflow is advanced primarily within the *Assignments* tab. The Inquiry Workflow utilizes a simple three step workflow:



First the Inquiry is accepted and assigned, using either the *Assignments* tab or the **Assign to Me** button in the *RA Inquiry* tab. The assigned user must investigate the inquiry, report the results of the inquiry to the submitting user via the case folders *Portal Messages* tab, and close the case folder.

## 4.2 Receive and Assign an Inquiry

When an Inquiry form is submitted from a portal user, it must be assigned to a user from the Case Queue. You can find all cases in your current queue in the *Cases in Queue* inbox from the RA Dashboard. Follow the steps below to receive and assign an Inquiry to yourself.

1. From the home screen, locate the Cases in Queue inbox, then locate the RA Inquiry you'd like to assign from the list and select the Folder ID:



## Working with Inquiries

The screenshot shows the eCASE interface with a sidebar on the left containing 'Main Menu', 'Inbox', and 'Mass Mailing'. The main content area is divided into two sections: 'Cases Assigned to Me' and 'Cases in Queue'. Both sections contain a table of cases with columns for Office, Folder ID, Case Type, Case Assigned Date, Case Due Date, Case Name, Folder Status, and Name Of Requester. A red arrow points from the '2021-IQR-00018' case in the 'Cases in Queue' table to the 'Assign to Me' button in the form below.

Office	Folder ID	Case Type	Case Assigned Date	Case Due Date	Case Name	Folder Status	Name Of Requester
123	2021-IQR-00004	RA Inquiry	10/25/2021 8:40:14 AM	10/30/2021 8:40:14 AM	Resolve and Close	In Progress	Rama Konduri
123	2021-IQR-00011	RA Inquiry	10/27/2021 4:01:31 PM	11/1/2021 4:01:31 PM	Resolve and Close	In Progress	Rama Konduri
123	2021-IQR-00015	RA Inquiry	12/23/2021 11:00:20 AM	12/28/2021 11:00:20 AM	Resolve and Close	In Progress	Russell Miller
123	2021-IQR-00016	RA Inquiry	12/28/2021 2:53:20 PM	1/2/2022 2:53:20 PM	Resolve and Close	In Progress	Russell Miller
123	2021-RAF-00034	RA File	12/28/2021 2:07:18 PM	1/11/2022 12:00:00 PM	Implementation of Approved RA	In Progress	Russell Miller

Office	Folder ID	Case Type	Case Assigned Date	Case Due Date	Case Name	Folder Status	Name Of Requester
123	2021-IQR-00018	RA Inquiry	12/29/2021 1:21:27 PM	1/3/2022 1:21:27 PM	Resolve and Close	In Progress	Russell Miller
123	2021-MODR-00013	RA Modification	12/28/2021 5:24:38 PM	1/4/2022 5:24:38 PM	Send Notifications to Employee and Supervisor	In Progress	Russell Miller
123	2021-RAF-00038	RA File	11/16/2021 8:30:47 PM	11/26/2021 8:30:47 PM	Reconsider and complete 557c	In Progress	Elizabeth Kraszewski

2. The *RA Inquiry* tab appears as shown below. Click the **Assign to Me** button:

The screenshot shows the 'Reasonable Accommodation Inquiry' form in the eCASE system. The form has a navigation bar at the top with 'RA Inquiry' selected, and tabs for 'Assignments', 'Attachments', 'Case Notes', 'Portal Messages', and 'Portal Forms'. Below the navigation bar, the 'Initiating Office' is 'OPX HQ - Opexus HQ' and the 'Folder Owner' is 'System Account'. A yellow banner at the top states 'Required fields are indicated with asterisk (\*) and red outline.' The form fields include: Control Number (2022-IQR-00001), FY (2022), Received Mode (eCase), Received Date (05/08/2023), Closed Date (mm/dd/yyyy), Employee Name\* (Amy Sui), Organizational Office\* (Office of Information Technology (OIT)), District (Headquarters), and Geographic Office (Headquarters). A red arrow points to the 'Assign to Me' button in the top right corner of the form.

3. A confirmation message appears as shown below. Click **Yes** to continue.

4. The screen refreshes and your name is added as the *Folder Owner*. The next step is to resolve and close this inquiry. See the following subsections for details.

### 4.3 Respond to an Inquiry

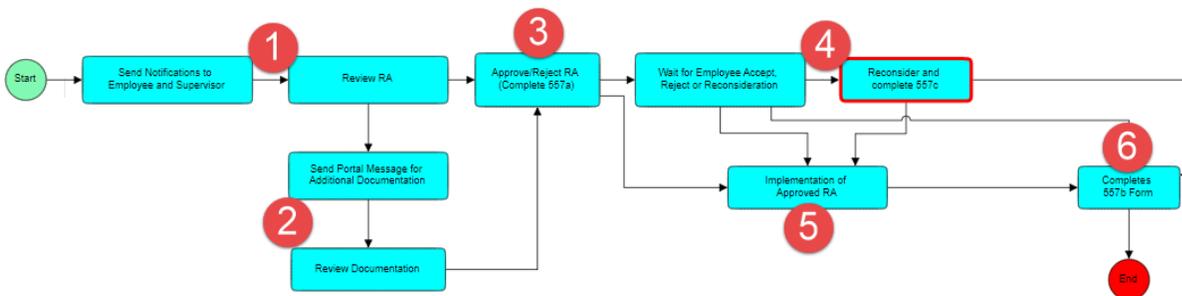
After an RA Inquiry is reviewed, the next step is to respond to the portal user. You can use the email templates configured via the Default Attachments in the *Attachments* tab. If the portal user wishes to move forward with a formal request, they are required to submit an RA Form from the portal. No further action is required in the RA application to close this RA Inquiry case.



# 5 Working with Reasonable Accommodations Files

## 5.1 Reasonable Accommodation Request Workflow

The overall RA Workflow is shown in the following diagram (viewable by clicking **Workflow Diagram** from the *Assignments* tab):



**Note: The current step in this request's workflow is outlined with a red border.**

The general workflow process is described below:

1. After the request is received and assigned, notifications are sent to the submitting employee and their supervisor, and the RA request is reviewed. The next step depends on the results of this review. If additional documentation is required, see step 2. Otherwise, see step 3.
2. Additional documentation may be required before this request can be accepted or rejected. Messages can be sent to the requester via the portal to provide this required documentation, which can be reviewed. This process can be repeated as much as is needed to acquire all necessary documentation. Once all documentation is received, see step 3.
3. After the RA Request is reviewed, a determination is made on the request. Determinations include: Approved as specifically requested, Approved but different from original request, Denied, or N/A. If the recommendation is Approved as specifically requested, see step 5. If the recommendation is Approved but different from original request, it is sent to the employee, who has the option to approve, reject, or request reconsideration on this determination if it was not approved as specifically requested. If the employee requests reconsideration, see step 4. If the employee accepts, see step 5.
4. If reconsideration is requested, the Approver must approve or reject this request and return it to the portal user. If the Approver accepts reconsideration, it is implemented as



described in step 5. If the Approver rejects reconsideration, the Information Reporting is completed, as shown in step 6.

5. If an RA is approved, the next step is to implement this request. These details are captured on Information Reporting Form.
6. The final step in the process is to complete the Information Reporting Form, regardless of the outcome of this request.

After an RA request is approved and implemented, the employee has the option to submit a modification to this request, which is received as an RA Modification case type and is always linked to the original request. See the *RA Modifications* section for details.

## 5.2 Receive and Assign an RA File

When an RA Request is submitted from a portal user, it must be assigned to a user from the Case Queue. You can find all cases in your current queue in the *Cases in Queue* inbox from the RA Dashboard. Follow the steps below to receive and assign an RA File to yourself.

1. From the home screen, locate the *Cases in Queue* inbox, then locate the RA File you'd like to assign from the list and click the **Folder ID**:

Cases Assigned to Me						
Office	Folder ID	Case Type	Case Assigned Date	Case Due Date	Case Name	Folder Status
123	2021-IQR-00004	RA Inquiry	10/25/2021 8:40:14 AM	10/30/2021 8:40:14 AM	Resolve and Close	In Progress
123	2021-IQR-00011	RA Inquiry	10/27/2021 4:01:31 PM	11/1/2021 4:01:31 PM	Resolve and Close	In Progress
123	2021-IQR-00015	RA Inquiry	12/23/2021 11:00:20 AM	12/28/2021 11:00:20 AM	Resolve and Close	In Progress
123	2021-IQR-00016	RA Inquiry	12/28/2021 2:53:20 PM	1/2/2022 2:53:20 PM	Resolve and Close	In Progress
123	2021-RAF-00034	RA File	12/28/2021 2:07:18 PM	1/11/2022 12:00:00 AM	Implementation of Approved RA	In Progress

Cases in Queue						
Office	Folder ID	Case Type	Case Assigned Date	Case Due Date	Case Name	Folder Status
123	2021-IQR-00018	RA Inquiry	12/29/2021 1:21:27 PM	1/3/2022 1:21:27 PM	Resolve and Close	In Progress
123	2021-MODR-00013	RA Modification	12/28/2021 5:24:38 PM	1/4/2022 5:24:38 PM	Send Notifications to Employee and Supervisor	In Progress
123	2021-RAF-00038	RA File	11/16/2021 8:30:47 PM	11/26/2021 8:30:47 PM	Reconsider and complete 557c	In Progress
123	2021-RAF-00041	RA File	12/29/2021 1:30:30 PM	1/8/2022 1:30:30 PM	Send Notifications to Employee and Supervisor	In Progress

2. The *Intake Form* tab appears as shown below. Click the **Assign to Me** button:



## Working with Reasonable Accommodations Files

Required fields are indicated with asterisk (\*) and red outline.

CONFIRMATION OF REQUEST FOR REASONABLE ACCOMMODATION				
Disability Program Manager "Read Only - To be filled by System"		Case Status:	<b>Assign to Me</b>	
RA Control Number: 2021-RAF-00039	FY: 2021	Received Mode: eCase	Received Date: 12/23/2021	Closed Date: mm/dd/yyyy
Employee Information				
Employee Name: * Russell Miller X		Organizational Office: * Executive Secretariat (ES)		

3. A confirmation message appears. Click **Yes** to continue.
4. The screen refreshes and a new **Send Notification** button appears. See the *Send Notifications* section for details on sending notifications.

### 5.3 Send Notifications

RA processing requires standard messages and notifications be sent to the portal user. Use the **Send Notification** button on the *Intake Form* screen to send templates messages to the portal user:

Intake Form   Resolution Form   Information Reporting   Post Case Processing   Attachments   Assignments   Case Notes   Portal Messages   Portal Forms

Initiating Office: **OPX HQ - Opexus HQ**   Folder Owner: **System Account**

Required fields are indicated with asterisk (\*) and red outline.

CONFIRMATION OF REQUEST FOR REASONABLE ACCOMMODATION				
Reasonable Accommodation Coordinator "Read Only - To be filled by System"		Case Status:	<b>Send Notification</b>	
RA Control Number: 2024-RAF-00048	FY: 2024	Received Mode: eCase	Received Date: 04/16/2024	Closed Date: mm/dd/yyyy
Employee Information				
Employee Name * Shannon Murphy X		Organizational Office * Office of the Chair (OCH)		
District * New York District		Geographic Office * New York District Office		
Grade * 13	Series GS-0318	Step 07		

An example *Send Attachment By Email* screen is shown below.



## Send Attachment By Email

The screenshot shows a web form titled "Send Attachment By Email". At the top, there are two tabs: "Content" and "Attachments", with "Attachments" selected. The form includes the following fields and controls:

- From\*:** A text input field containing "test@ains.com".
- To\*:** A text input field with a red callout 'A' next to it. Below it is a note: "[Note: To enter multiple recipients use a comma or semi-colon as a separator with NO SPACES between email addresses]".
- Cc:** A text input field with a note below it: "[Note: To enter multiple recipients use a comma or semi-colon as a separator with NO SPACES between email addresses]".
- Show Bcc:** A checkbox that is currently unchecked.
- Email Template:** A dropdown menu with "[Select Email Template]" selected and a red callout 'B' next to it.
- Subject:** An empty text input field.
- Message:** A rich text editor with a toolbar containing icons for bold, italic, underline, strikethrough, subscript, superscript, link, unlink, bulleted list, numbered list, indent, and outdent. Below the toolbar is a text area with the placeholder "Type something".
- Buttons:** At the bottom, there are five buttons: "Attach From Disk" (green, with callout 'C'), "Attach From" (orange), "Spell..." (white), "Send" (blue, with callout 'D'), and "Close" (white).

Add the recipient email in the **(A) To** field. Next, select an **(B) Email Template** from the drop-down list. These templates are configured to provide standard language to accompany all stages of the request. There are also options to **(C) Attach From Disk** and **Attach From** if you need to add attachments. Finally, click **(D) Send** to send the notification.

## 5.4 Update Case Status

Follow the steps below to update the current *Case Status*. This status reflects on the Portal side so the portal user can see the current case status. To update the case status:

1. Open the desired case folder, and navigate to any *Form* tab (the Case Status drop-down is available on each of these tabs).
2. Click the **Case Status** drop-down list and select a new status.



## Working with Reasonable Accommodations Files

CONFIRMATION OF REQUEST FOR REASONABLE ACCOMMODATION				
<b>Disability Program Manager</b> "Read Only - To be filled by System"		<b>Case Status:</b> ▼	<input type="button" value="Send Notification"/>	
RA Control Number: 2021-RAF-00039	FY: 2021	Case Closed Pending Admin Budget Pending Admin Facilities Pending BFS Pending Card Holder Pending Decision Maker <b>Pending Employee</b> Pending FOH Pending OCHCO Budget Pending OCIO Pending Other Pending Program Office Pending RAB Pending RSD Pending Vendor RAB Post-Eligibility RAB-Pre-Eligibility RAB-RAC RAB-RAC Memo	Received Date: 12/23/2021	Closed Date: mm/dd/yyyy
<b>Employee Information</b>				
Employee Name: * Russell Miller X				
District: Dallas District				
Grade: 04				
Telephone Number: *				

3. Click **Save** in the upper left.
4. The screen refreshes and reflects the updated status. This update is also reflected on the portal side as shown below:

Required fields are indicated with asterisk (\*) and red outline.

CONFIRMATION OF REQUEST FOR REASONABLE ACCOMMODATION				
<b>Disability Program Manager</b> "Read Only - To be filled by System"		<b>Case Status:</b> Pending Employee ▼		
RA Control Number: 2021-RAF-00039	FY: 2021	Received Mode: eCase ▼	Received Date: 12/23/2021	Closed Date: mm/dd/yyyy

## 5.5 Advancing the RA Workflow

### 5.5.1 Continue Workflow

During request processing, once required steps are taken and the workflow is ready to move forward to the next step, follow the process below to log this in the system and continue the workflow:

To continue the workflow, you can either click **Save & Complete** from the *Intake Form* tab, or navigate to the *Assignments* tab, select the current task under *Tasks Assigned to Me*, then click **Complete**. After completing either method, the *Continue Workflow* screen appears as shown in the following example:



## Working with Reasonable Accommodations Files

### Continue Workflow

Note: \* fields are mandatory.

Case Note

Comments

**A**

Add Comments

Attach file(s) **B**  No file chosen

Add Journal Entry Attachments to the Email  **C**

**D**

**Note: Some workflow steps require you to select the next activity in the process. See the [Select Next Activity](#) section for steps.**

You can add **(A) Comments** in the field provided. There are also options to **(B) Attach file(s)** if needed. You can also select the **(C) Add Journal Entry Attachments to the Email** checkbox if you'd like the attachments added to the email notification. Finally, click **(D) Continue** to commit the action and advance the workflow.

The workflow now advances to the next step. This action is also logged on the *Case Notes* tab as shown below:

User	Comments	Attachments	Action Office	Date/Time	Action
Dpm User	Sample to advance the workflow.	0 Attachments	123 - Ains_HQ	12/23/2021 12:52:06 PM	Continue Workflow [Send Notifications to Employee ...

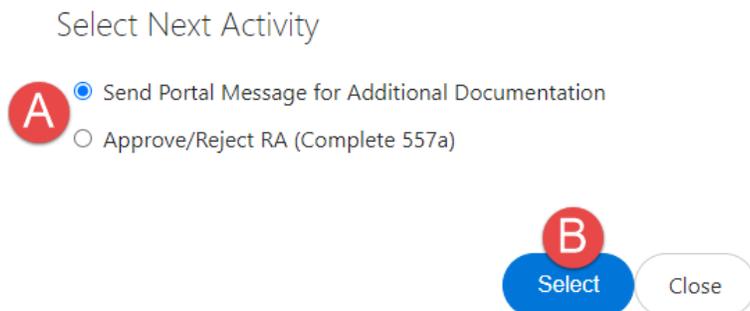
Show:



## 5.5.2 Select Next Activity

Depending on the current place in the workflow, you may be prompted to select the next activity when continuing the workflow. Follow the steps below if you are prompted to *Select Next Activity*:

An example *Select Next Activity* screen is shown below. There are multiple options for next steps in the process depending on where you are in the workflow and the actions you just took.



There are **(A)** options for the next activity. In this example there are options to **Send Portal Message for Additional Documentation**, or **Approve/Reject RA**. Select the desired next activity radio button, then click **(B) Select**.

The *Continue Workflow* screen appears. Follow the steps in the *Continue Workflow* section to complete this process.

## 5.6 Approve or Deny Accommodations

When a decision is made to approve or deny the requested accommodations, open the request, and navigate to the *Resolution Form* tab.

Required fields are indicated with asterisk (\*) and red outline.

RESOLUTION OF REASONABLE ACCOMMODATION REQUEST				
Disability Program Manager "Read Only - To be filled by System"		Case Status: <input type="text"/>	Send Notification	
RA Control Number:	FY: 2022	Received Mode: eCase	Received Date: 05/19/2023	Closed Date: mm/dd/yyyy
Employee Information				
Employee Name: * Sean O'Calla-Han x		Accommodation(s): * <input type="checkbox"/> Approved as specifically requested <input type="checkbox"/> Approved but different from original request* <input checked="" type="checkbox"/> Denied <input type="checkbox"/> N/A		



Under *Accommodation(s)*, select from the options listed. These options are described below:

Option	Description
Approved as specifically requested	The requested accommodation is approved with no modifications.
Approved but different from original request	<p>The accommodation is approved, but with modifications from the original request. If this option is selected, additional fields appear. First, identify the alternative accommodations in the field provided. Once the requester has approved or rejected these alternative accommodations, this determination can be marked using the <b>Accepted</b> or <b>Rejected</b> checkboxes:</p> <div data-bbox="602 877 1453 1392" style="border: 1px solid #ccc; padding: 10px;"> <p>Accommodation(s): *</p> <p><input type="checkbox"/> Approved as specifically requested</p> <p><input checked="" type="checkbox"/> Approved but different from original request*</p> <p><input type="checkbox"/> Denied</p> <p>* If the approved accommodation is different from the one(s) originally requested, identify the alternative accommodation(s)</p> <div style="border: 1px solid red; height: 60px; width: 100%;"></div> <p>Alternative Accommodation(s)</p> <p><input type="checkbox"/> Accepted</p> <p><input type="checkbox"/> Rejected</p> </div>



Option	Description
Denied	<p>The accommodation is denied. If denied, an additional field appears to select the <i>Request Denied Because</i> reason. Use the <b>Lookup</b> to select a reason for this denial:</p> <div data-bbox="602 443 1463 737" style="border: 1px solid #ccc; padding: 5px;"> <p>Accommodation(s): *</p> <p><input type="checkbox"/> Approved as specifically requested</p> <p><input type="checkbox"/> Approved but different from original request*</p> <p><input checked="" type="checkbox"/> Denied</p> <hr/> <p>Request Denied Because:</p> <div style="border: 1px solid #ccc; height: 20px; width: 100%;"></div> <div style="text-align: right; border: 1px solid #ccc; border-radius: 50%; width: 20px; height: 20px; display: flex; align-items: center; justify-content: center; margin-left: 5px;">Q</div> </div>
N/A	The accommodation can be closed without specifying whether it has been approved or denied.

Click **Save & Continue** to save the determination and advance the workflow. Note that the portal user may have the option to request reconsideration of this decision.

## 5.7 Reconsideration

Portal users have the option to accept the office decision on their request, or to send it back for reconsideration if they are not satisfied with the outcome. If a request is sent back for reconsideration, this request must be completed by an Approver user. Only users with Approver permissions will have access to the *Reconsideration Form* tab.

Follow the steps below to complete the Reconsideration Decision process.

1. Access the request in reconsideration, and navigate to the *Reconsideration Form* tab.



Reconsideration Decision	
RAC response due date: (05/08/2024)	
Employee Name * John Gatewood	Employee Decision: <b>Reject and Request for Reconsideration</b>
Result of Reconsideration: * <input type="checkbox"/> Approved * <input type="checkbox"/> Disapproved *	Date Reconsideration Requested: 04/17/2024 Date Reconsideration Issued *: mm/dd/yyyy
<input type="checkbox"/> Click to sign Reconsideration Form	
Approver Signature	Date decision made
	mm/dd/yyyy

2. Under *Result of Reconsideration*, select either **Approved** or **Disapproved** to reflect the decision on this reconsideration.

a. If you elect to **Approve** this request, an additional field appears where you are required to enter the *Reason for Approving Reconsideration*:

Result of Reconsideration: * <input checked="" type="checkbox"/> Approved <input type="checkbox"/> Disapproved	Date Reconsideration Requested: 10/27/2021	Date Reconsideration Issued: mm/dd/yyyy
Reason for Approving Reconsideration: <div style="border: 1px solid red; height: 40px;"></div>		

b. If the reconsideration is **Disapproved**, additional fields appear to capture disapproval details. Use the lookup to select the *Request Denied Because* reasoning (you can select more than one). You must also enter *Detailed reason(s) for the denial* in the field provided. As noted here, these details must be specific.

Result of Reconsideration: * <input type="checkbox"/> Approved <input checked="" type="checkbox"/> Disapproved	Date Reconsideration Requested: 10/27/2021	Date Reconsideration Issued: mm/dd/yyyy
Request Denied Because: <div style="border: 1px solid red; height: 20px;"></div>	Detailed Reason(s) for the denial (Must be specific, e.g., why accommodation would be ineffective or cause undue hardship): <div style="border: 1px solid red; height: 40px;"></div>	

3. After filling in all required fields, you can use the **Click to sign form button** to apply your signature to the form:

<input type="checkbox"/> Click to sign Reconsideration Form	
Approver Signature	Date decision made
	mm/dd/yyyy

4. Finally, click **Save** to save the determination.

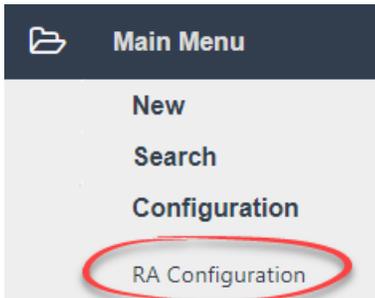




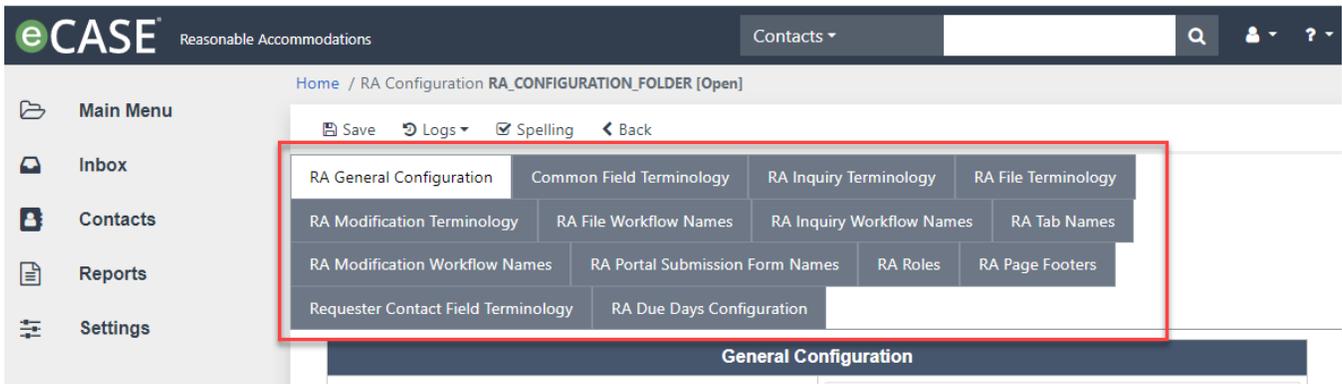
# 7 RA Configuration

## 7.1 Accessing RA Configuration

To access the Configuration folder, select **Main Menu > Configuration > RA Configuration**.



eCASE RA refreshes and displays the *Configuration* folder, with the *RA General Configuration* tab selected.



The various *Tabs* are listed at the top of the interface. After selecting a tab, the *Configuration* settings appear in the workspace. A full list of tabs is included in the following section.

## 7.2 RA Configuration Tabs

The eCASE RA Configuration folder allows administrators to configure fields appearance and behavior within each Case Folder. The Configuration folder consists of the following tabs:

Tab	Description
RA General Configuration	Set miscellaneous general configurations such as First Level Approver email address



Tab	Description
Common Field Terminology	Define common field display names, show/hide fields, mark fields are required/unrequired, and set employee type requirements.
RA Inquiry Terminology	Define RA Inquiry field display names, show/hide fields, mark fields are required/unrequired, and set employee type requirements.
RA File Terminology	Define RA File field display names, show/hide fields, mark fields are required/unrequired, and set employee type requirements.
RA Modification Terminology	Define RA Modification field display names, show/hide fields, mark fields are required/unrequired, and set employee type requirements.
RA File Workflow Names	Set display names for RA File workflow activities and select the associated Approver role.
RA Inquiry Workflow Names	Set display names for RA Inquiry workflow activities and select the associated Approver role.
RA Tab Names	Define display names for RA File, RA Modification, and RA Inquiry tabs.
RA Modification Workflow Names	Set display names for RA Modification workflow activities and select the associated Approver role.
RA Portal Submission Form Names	Configure display names for the RA Submission forms.



## RA Configuration

Tab	Description
RA Roles	Configure role names (Full Name and Short Name) for First and Second Level Approvers.
RA Page Footers	Customize the page footer that appears on RA File and RA Modification pages.
Requester Contact Field Terminology	Configure fields shown on the Requester Contact Information page. Define field display names, show/hide fields, mark fields are required/unrequired, and set employee type requirements.
RA Due Days Configuration	Set the number of days used to auto populate the Employee Response Due Date and the Reconsideration Response Due Date. Enter a number of days between 1-99.

