Oracle® Health Response Readiness Self-Service Approval Portal User Guide



F76264-08 August 2024

ORACLE

Oracle Health Response Readiness Self-Service Approval Portal User Guide,

F76264-08

Copyright © 2023, 2024, Oracle and/or its affiliates.

This software and related documentation are provided under a license agreement containing restrictions on use and disclosure and are protected by intellectual property laws. Except as expressly permitted in your license agreement or allowed by law, you may not use, copy, reproduce, translate, broadcast, modify, license, transmit, distribute, exhibit, perform, publish, or display any part, in any form, or by any means. Reverse engineering, disassembly, or decompilation of this software, unless required by law for interoperability, is prohibited.

The information contained herein is subject to change without notice and is not warranted to be error-free. If you find any errors, please report them to us in writing.

If this is software, software documentation, data (as defined in the Federal Acquisition Regulation), or related documentation that is delivered to the U.S. Government or anyone licensing it on behalf of the U.S. Government, then the following notice is applicable:

U.S. GOVERNMENT END USERS: Oracle programs (including any operating system, integrated software, any programs embedded, installed, or activated on delivered hardware, and modifications of such programs) and Oracle computer documentation or other Oracle data delivered to or accessed by U.S. Government end users are "commercial computer software," "commercial computer software documentation," or "limited rights data" pursuant to the applicable Federal Acquisition Regulation and agency-specific supplemental regulations. As such, the use, reproduction, duplication, release, display, disclosure, modification, preparation of derivative works, and/or adaptation of i) Oracle programs (including any operating system, integrated software, any programs embedded, installed, or activated on delivered hardware, and modifications of such programs), ii) Oracle computer documentation and/or iii) other Oracle data, is subject to the rights and limitations specified in the license contained in the applicable contract. The terms governing the U.S. Government's use of Oracle cloud services are defined by the applicable contract for such services. No other rights are granted to the U.S. Government.

This software or hardware is developed for general use in a variety of information management applications. It is not developed or intended for use in any inherently dangerous applications, including applications that may create a risk of personal injury. If you use this software or hardware in dangerous applications, then you shall be responsible to take all appropriate fail-safe, backup, redundancy, and other measures to ensure its safe use. Oracle Corporation and its affiliates disclaim any liability for any damages caused by use of this software or hardware in dangerous applications.

Oracle®, Java, MySQL, and NetSuite are registered trademarks of Oracle and/or its affiliates. Other names may be trademarks of their respective owners.

Intel and Intel Inside are trademarks or registered trademarks of Intel Corporation. All SPARC trademarks are used under license and are trademarks or registered trademarks of SPARC International, Inc. AMD, Epyc, and the AMD logo are trademarks or registered trademarks of Advanced Micro Devices. UNIX is a registered trademark of The Open Group.

This software or hardware and documentation may provide access to or information about content, products, and services from third parties. Oracle Corporation and its affiliates are not responsible for and expressly disclaim all warranties of any kind with respect to third-party content, products, and services unless otherwise set forth in an applicable agreement between you and Oracle. Oracle Corporation and its affiliates will not be responsible for any loss, costs, or damages incurred due to your access to or use of third-party content, products, or services, except as set forth in an applicable agreement between you and Oracle.

Contents

1

2

3

4

Documentation Accessibility	
Diversity and Inclusion	
Introduction to Oracle Health Response Readiness	
What is Oracle Health Response Readiness?	1-
What are the Oracle Health Response Readiness portals?	1-
Who are the Oracle Health Response Readiness users?	1.
Multi-factor authentication	1-
Oracle Health Response Readiness Launchpad	1-
Self-Service Approval Portal overview	
Self-Service Approval Portal menus	2
Navigation and search	2
Site map	2
Self-Service Approval Portal workflow	2
Activate your account	
Activate your account with email verification	3
Activate your account with mobile app QR code verification	3
Access Oracle Health Response Readiness	
Sign in to Oracle Health Response Readiness	4
Manage your profile	4
Reset your password	4
Sign out of Oracle Health Response Readiness	4



5 View the dashboard

View the dashboard statistics on the requests

6 Prepare for approval

Manage requests	6-1
View the list of requests submitted for approval	6-2
View the details for a request	6-2
View the status updates for a site request	6-3
View and modify the site details for a request	6-3
View the primary contact information for a site	6-6
View the receiving hours for a site	6-7
View the documents for a site	6-7
Manage reviewers	6-8
View the list of reviewers	6-8
Add a reviewer	6-9
Modify an administration reviewer	6-11
Modify a partner reviewer	6-12
Inactivate a reviewer	6-13
Manage registrants	6-14
View the list of registrants	6-14
View the details for a registrant	6-17
Delete a non-respondent registrant	6-17
View the list of deleted registrants	6-19
Manage documents	6-19
View the documents	6-20
Add a document	6-20
Modify a document	6-22
Inactivate a document	6-24

7 Approve requests

Approval process	7-1
Review and approve a request with the wizard	7-2
Open the wizard	7-3
Step 1: Assign Partner	7-4
Step 2: Review Site Matches	7-6
Step 3: Review Contact Matches	7-8
Step 4: Review Receiving Hours	7-10
Step 5: Review Documentation	7-12
Step 6: Complete Processing	7-13



5-1

Perform the actions required for approval	7-16
Assign a partner to a site	7-17
Put a request on hold	7-21
Send a request for partner review	7-24
Approve a request	7-26
Activate a request	7-30
Reject a request	7-30
Approve or reject site documents	7-34
Perform the reviews required for approval	7-36
Review the site addresses	7-37
Review the site contacts	7-40
Review the completed documentation	7-43

8 View the self-service statuses

View descriptions of the request statuses	8-1
View descriptions of the review statuses	8-2
View descriptions of the document statuses	8-2
View descriptions of the verify statuses	8-2



Preface

This preface contains the following sections:

- Documentation Accessibility
- Diversity and Inclusion

Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at http://www.oracle.com/pls/topic/lookup?ctx=acc&id=docacc.

Diversity and Inclusion

Oracle is fully committed to diversity and inclusion. Oracle respects and values having a diverse workforce that increases thought leadership and innovation. As part of our initiative to build a more inclusive culture that positively impacts our employees, customers, and partners, we are working to remove insensitive terms from our products and documentation. We are also mindful of the necessity to maintain compatibility with our customers' existing technologies and the need to ensure continuity of service as Oracle's offerings and industry standards evolve. Because of these technical constraints, our effort to remove insensitive terms is ongoing and will take time and external cooperation.

Introduction to Oracle Health Response Readiness

Learn about the Oracle Health Response Readiness product suite, its portals, users, and security features.

Note:

Your implementation of Oracle Health Response Readiness may use a custom name for use in the banner that appears at the top of every page. For more information, contact your Oracle Customer Success manager.

• What is Oracle Health Response Readiness?

Oracle Health Response Readiness is a suite of web-based portals that enable large organizations (for example, government agencies) that own stockpiles of critical supplies to push the critical or limited resources from a central location to many different end sites.

- What are the Oracle Health Response Readiness portals? Oracle Health Response Readiness consists of six integrated portals, each with a different purpose and different users.
- Who are the Oracle Health Response Readiness users? There are multiple users of the Oracle Health Response Readiness portals. The users have different responsibilities and access to the portals and their features.

• Multi-factor authentication

To ensure security, Oracle Health Response Readiness requires multi-factor authentication (MFA) codes when you sign in to any of the portals. MFA ensures the security of the portals by requiring all users to enter something they know (their password) and something they have (an MFA code) before they can access the system.

Oracle Health Response Readiness Launchpad

The Launchpad, which opens automatically after you sign in to Oracle Health Response Readiness, provides links to the portals you have rights to access. You can also open the Launchpad from within a portal at any time.

What is Oracle Health Response Readiness?

Oracle Health Response Readiness is a suite of web-based portals that enable large organizations (for example, government agencies) that own stockpiles of critical supplies to push the critical or limited resources from a central location to many different end sites.

A large organization receives order requests for those supplies from smaller organizations. The large organizations approve requests based on thresholds and prioritization, and then begin the distribution processes.

You can use Oracle Health Response Readiness to manage:

Urgent and emergency situations (such as public health emergencies)



- Scenarios when supplies may be limited (such as limited water after a hurricane)
- Circumstances where new receiving sites are actively being created and organized. Oracle Health Response Readiness includes the ability to transfer resources between sites.

You can access the Oracle Health Response Readiness portals on your computer, mobile phone, or tablet.

Note:

Your implementation of Oracle Health Response Readiness may use a custom name for use in the banner that appears at the top of every page. For more information, contact your Oracle Customer Success manager.

What are the Oracle Health Response Readiness portals?

Oracle Health Response Readiness consists of six integrated portals, each with a different purpose and different users.

You can access the Oracle Health Response Readiness portals on your computer, mobile phone, or tablet.

Portal	Purpose
Self-Service Request Portal	Submit an application to become an approved site that can order and manage response products.
	Requests are sent to Self-Service Approval Portal for review and approval.
Self-Service Approval Portal	Review, approve, and activate requests sent from Self-Service Request Portal .
	After requests are approved and activated, users can sign in to Site Portal to order and manage response products.
Site Portal	Create response product orders for delivery and manage the inventory.
	Site Portal sends all orders to Partner Portal for approval and processing.
Partner Portal	Approve and process orders for response products sent from Site Portal and create new orders, if needed.
Distributor Portal	Pick up orders ready for distribution and upload shipping information.
Administrator Portal	Set up partner, responses, and products for users to order and process in Site Portal and Partner Portal .

Who are the Oracle Health Response Readiness users?

There are multiple users of the Oracle Health Response Readiness portals. The users have different responsibilities and access to the portals and their features.

User	Description	
Administrators	Users who set up and maintain products, responses, and partners.	
	 Set up and maintain products Configure product details, requirements, and options such as apportionment (a partner places orders for a site) Set product ordering thresholds and distribution rules Set up and maintain responses Set up and maintain partners Input partner information, permissions, and ordering rules Review operational dashboards Manage enhancement requests from users 	
	 Push on-screen notifications to users Administrator users can access Administrator Portal. 	
Partners (and Organizations)	Users who manage the allocation, distribution, and inventory within their area of responsibility. Partners include jurisdictions (states and territories), federal agencies, large healthcare/ pharmacy organizations, and independent pharmacies.	
	 Set up and manage sites and organizations Input site and organization information, permissions, and ordering rules Manage orders Process and approve direct orders from sites (sites place their own orders) 	
	 Process orders for sites (apportionment) Update inventory details Transfers, dispositions (wastages and returns), stock on hand, and stock administered 	
	 Update inventory details (for example, transfers, dispositions, stock on hand, and stock administered) Communicate to their sites Review operational dashboards for their sites only Partner users can access Partner Portal. 	
Sites / site users	Businesses or associations that administer or distribute response products to patients and customers. Sites include chain or independent pharmacies and organizations such as hospitals, clinics, doctors' offices, or dialysis centers. Site users:	
	 Order and request response products according to rules/ permissions (may include ancillary kits) Set contact and logistical information Update inventory (transfers, dispositions, stock on hand) View shipment statuses Receive communication Provide system feedback Approved site users can access Site Portal. 	
Distributors	 Users who manage warehouse inventory and shipping information. Access orders Update distribution information Distributor users can access Distributor Portal. 	



Multi-factor authentication

To ensure security, Oracle Health Response Readiness requires multi-factor authentication (MFA) codes when you sign in to any of the portals. MFA ensures the security of the portals by requiring all users to enter something they know (their password) and something they have (an MFA code) before they can access the system.

An MFA code is also known as a one-time code because it changes or expires within a set amount of time to ensure no one can guess it.

You can access your MFA code for Oracle Health Response Readiness in an email or by scanning a QR code with an authentication app (such as Oracle Mobile Authenticator, Google Authenticator, or Microsoft Authenticator) on your mobile device. You can use either method to receive an MFA code, but you must use an MFA code to activate your account and each time you sign in to an Oracle Health Response Readiness portal.

Oracle Health Response Readiness Launchpad

The Launchpad, which opens automatically after you sign in to Oracle Health Response Readiness, provides links to the portals you have rights to access. You can also open the Launchpad from within a portal at any time.

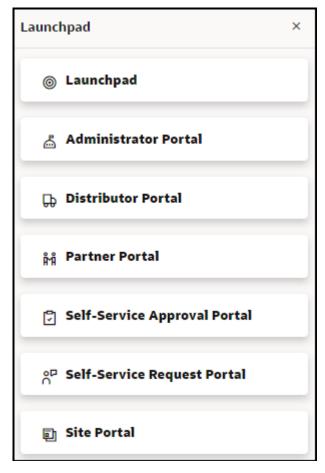
To open the Launchpad from within a portal:

 Locate your user name (initials) on the right side of the banner and select Launchpad from the drop-down menu. For example:



2. In the **Launchpad** panel, select a link to open a Oracle Health Response Readiness portal. Only the portals you have access to appear in the Launchpad panel. For example:





3. If you don't want to select a portal, at the top right select the X to close the Launchpad panel.



2 Self-Service Approval Portal overview

Self-Service Approval Portal is one of the portals in the Oracle Health Response Readiness product suite. Administrators use Self-Service Approval Portal to review, approve, and activate requests created in Self-Service Request Portal.

After requests are approved and activated, users can sign in to Site Portal to create response product orders for delivery and manage the inventory.

Self-Service Approval Portal menus

The Self-Service Approval Portal opens after you sign in to Oracle Health Response Readiness and select Self-Service Approval Portal from the Launchpad. The Self-Service Approval Portal menus provide access to menus you use to review statistics on the requests, prepare requests for approval, and approve the requests.

Navigation and search

Oracle Health Response Readiness provides multiple options for navigating through the features of each portal including menu buttons, breadcrumb trails, and an optional text navigation pane.

• Site map

The site map provides a list of all the Self-Service Approval Portal menus as links.

• Self-Service Approval Portal workflow Use the workflow steps to guide you through working in Self-Service Approval Portal.

Self-Service Approval Portal menus

The Self-Service Approval Portal opens after you sign in to Oracle Health Response Readiness and select Self-Service Approval Portal from the Launchpad. The Self-Service Approval Portal menus provide access to menus you use to review statistics on the requests, prepare requests for approval, and approve the requests.

After you approve and activate requests, the system activates the site and sends an email message to the request contact. That person can then follow the steps to sign in to Site Portal and order and manage response products.

Dashboard Requests Registrants Documents	Dashboard	
Documents	Partner 🔹	Rest
P₀ Reviewers ✓ Statuses	Number of Requests Per Status	Average Number of days from Partner Review to Activate/Rejected

Item	Description	
Dashboard	Provides statistics that track how quickly requests move through the approval process. See View the dashboard.	



Item	Description	
Requests	Use to:	
	 View the requests submitted for approval by Self-Service Request Portal, view the request details, and view and modify the site details for a request, view the requested sites, and view the deleted sites. See Manage requests. Open the approval wizard to help you approve a request a quickly as possible. See Review and approve a request with the wizard. Access the Actions menu and options if you want to perform the actions required for approval manually. See Perform the actions required for approval. Access the Reviews menu and options if you want to perform the reviews required for approval. 	
Registrants	Assess the registrants submitted by Self-Service Request Portal to identify users who submitted their site information, who need self-service site email messages sent again, or appear as duplicates or invalid users in the system. See Manage registrants.	
Documents	Manage common and partner documents along with upload instructions, whether to automatically upload them with new site records, if they are mandatory, and if they are active. The system automatically lists the documents the organization associated with a site wants to review. See Manage documents.	
Reviewers	View, add, and modify the types of reviewers (administration reviewers or partner reviewers) and their role (self-service administrator or self-service reviewer). See Manage reviewers.	
Statuses	View descriptions for the request, review, document, and verification statuses that appear in Self-Service Approval Portal to track the approval process for each request. See View descriptions of the request statuses.	

Navigation and search

Oracle Health Response Readiness provides multiple options for navigating through the features of each portal including menu buttons, breadcrumb trails, and an optional text navigation pane.

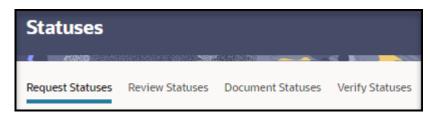
Oracle Health Response Readiness also provides a sophisticated search feature on most list pages that is specific to the page. Next to the search feature, there is a option to download the page data in CSV format so you can review it. On pages with a large number of columns there is an option to customize the page if you want to view (and download) fewer columns.

Caution:

Your implementation of Oracle Health Response Readiness may use a custom name for use in the banner that appears at the top of every page. For more information, contact your Oracle Customer Success manager.



n is also known <i>icon</i> .
ation pane:
/igation icon o the banner.
/igation icon the navigation
open the



Item	Description	Details
Search field	A detailed search feature is available on many list pages. The Search field appears below the page title or below the tabs. For example:	 In the Search field, do one or both of the following, and then select Enter: Enter text or numbers. Select in the field and then choose one or more criteria from the drop-down options and provide any required details. The criteria options are specific to the page you are working in.
Search page download	On every page with the search feature, a Download icon appears to the right of the Search field so that you can download and review the data on the page in CSV format. For example:	 To download the data: Select the Download icon to the right of the Search field. In the Downloading panel, select OK.
Search page column	On many pages with the search feature,	To customize the page columns:
selector	a Column selector icon appears to the right of the Download icon so that you can customize the page columns. For example:	1. Select the Column Selector icon to the right of the Search field.
		2. In the Column Selector panel select the columns to show on
	The column selector only appears if the page includes a large number of columns. The columns you select appear on the page and in the Search page download.	the page.3. Select Save.

Site map

The site map provides a list of all the Self-Service Approval Portal menus as links.

To open the site map:

1. At the top right of the banner, select **Site Map** from the **Help** menu. For example:

(?) н	elp 🔻	LC
18	Site M	lap

The Site Map page opens. For example:



Self-Service Approval Portal Site Map

- Oashboard
- ^{6^P} Requests
- Documents
- & Reviewers
- Statuses
- 2. In the **Self-Service Approval Portal Site Map** page, select the text link for any menu to open the user interface page. The navigation pane opens on the left.

Self-Service Approval Portal workflow

Use the workflow steps to guide you through working in Self-Service Approval Portal.

To work in Self-Service Approval Portal:

- 1. Activate your account using multi-factor authentication as described in Activate your account. You only have to activate your account one time.
- Sign in to Oracle Health Response Readiness and open Self-Service Approval Portal as described in Sign in to Oracle Health Response Readiness.
 The Dashboad page opens by default. To open the navigation pane, which provides a text list of the menus you use to perform the tasks available in the portal, select the Navigation

icon icon the left side of the banner.

Note:

Select the Navigation icon again to close the navigation pane.

- 3. Review the information submitted by the site as described in Prepare for approval.
 - If you are an administration user, you can, depending on your role as self-service administrator or self-service reviewer, manage the administration and partner reviewers, registrants, and documentation uploaded for inclusion with each request.
 - If you are a partner reviewer, you can, depending on your role as self-service administrator or self-service reviewer, manage the reviewers for the sites you are associated with, and manage the documentation uploaded for inclusion with each partner request.
- 4. Approve the requests by performing a series of actions and reviews on the information in the request. The available actions depend on your role. The reviews are the same regardless of your role as an administration user (self-service administrator or self-service reviewer) or partner user (self-service administrator or self-service reviewer). You can:
 - Approve requests with a wizard as described in Review and approve a request with the wizard.

The wizard, which is only available to administration users, guides you through the actions and reviews required to help you approve a request as quickly as possible.

• **Perform the actions required for approval manually** as described in Perform the actions required for approval.

The actions available to perform on a request depend on your role and the status of the request. You can perform the actions in any order and at any time.



• **Perform the reviews required for approval manually** as described in Perform the reviews required for approval.

The reviews available to perform on a request are the same regardless of your role. They are, however, dependent on the status of the request. You can perform the reviews in any order and at any time.

Note:

After a request is approved and activated, you can no longer change any of its details. You can, however, continue to view the request details, as needed. See View the details for a request.

- 5. At any time after you sign in, you can:
 - Review and update the date, time, and language details that appear in the portal, as described in Manage your profile.
 - Reset your password, as described in Reset your password.
 - Re-open the Launchpad to switch to a different Oracle Health Response Readiness portal, as described in Oracle Health Response Readiness Launchpad.

3 Activate your account

An administrator creates an account for you that allows you to access Oracle Health Response Readiness. You then receive an email with instructions for setting your password and activating your account, which requires a multi-factor authentication (MFA) code. You only activate your account one time.

You can request to receive the MFA code in an email or through an authentication app on your mobile device.

- Activate your account with email verification After you receive your Oracle Health Response Readiness Welcome email, you can choose to activate your account by setting a password and requesting your multi-factor authentication (MFA) code in an email.
- Activate your account with mobile app QR code verification
 After you receive your Oracle Health Response Readiness Welcome email, you can
 choose to activate your account by setting a password and scanning a QR code one time
 with a mobile device using an authentication app. The QR code is associated with your
 account and Oracle Health Response Readiness.

Activate your account with email verification

After you receive your Oracle Health Response Readiness Welcome email, you can choose to activate your account by setting a password and requesting your multi-factor authentication (MFA) code in an email.

To activate your account with email verification:

- **1.** Locate the Welcome email message sent to you from Oracle.
- 2. In the email message, select Activate Your Account.
- 3. In the **Reset Your Password** dialog box, enter the password you want to use for your account, confirm it, and select **Reset Password**.

Your password must be between 8 and 25 characters and must include:

- 1 uppercase letter
- 1 lowercase letter
- 1 number
- 1 special character

Your password cannot:

- Contain the first name of the user
- Contain the last name of the user
- Contain the user name
- Repeat the last four passwords



Note:

Your password expires after 120 days.

- 4. In the Congratulations dialog box, select Continue to Sign In.
- 5. In the Login dialog box, enter your user name and password, and select Sign In.
- 6. In the Enable Secure Verification dialog box, select Enable Secure Verification.
- 7. In the **Select Your Default Secure Verification Method** dialog box, select **Email**. An email is sent to you with a one-time verification passcode.
- Locate the message from Oracle in your email and open it. It contains your six-digit MFA code.



The MFA code expires in 10 minutes.

- In the refreshed Select Your Default Secure Verification Method dialog box, in the Code field, enter the six-digit MFA code you see in your email, and then select Verify Email Address.
- 10. In the Successfully Enrolled dialog box, select Done.
- **11.** Sign in to Oracle Health Response Readiness.

Activate your account with mobile app QR code verification

After you receive your Oracle Health Response Readiness Welcome email, you can choose to activate your account by setting a password and scanning a QR code one time with a mobile device using an authentication app. The QR code is associated with your account and Oracle Health Response Readiness.

To scan the QR code, you must download an authentication app (such as Oracle Mobile Authenticator, Google Authenticator, or Microsoft Authenticator) to your phone or tablet. You only need to scan the QR code one time. From then on, Oracle Mobile Authenticator, Google Authenticator, or Microsoft Authenticator generates a new MFA code for your account each time you need it. You must leave the authentication app on your device to open it and access a new MFA code each time you want to sign in to Oracle Health Response Readiness.

If you need to install Oracle Mobile Authenticator, Google Authenticator, or Microsoft Authenticator on the same device again or another device (for example, a new mobile phone), you need to request that an Oracle Health Response Readiness administrator resets your MFA. You can then scan a new QR code on your device and sign in to Oracle Health Response Readiness.

Note:

If you cannot or do not want to use your mobile device to scan the QR code, you can skip the scanning step and receive your MFA code through an email message.

To activate your account with mobile application QR code verification:



- 1. Locate the Welcome email message sent to you from Oracle.
- 2. In the email message, select Activate Your Account.
- 3. In the **Reset your Password** dialog box, enter the password you want to use for your account, confirm it, and select **Reset Password**.

Your password must be between 8 and 25 characters and must include:

- 1 uppercase letter
- 1 lowercase letter
- 1 number
- 1 special character

Your password cannot:

- Contain the first name of the user
- Contain the last name of the user
- Contain the user name
- Repeat the last four passwords

Note:

Your password expires after 120 days.

- 4. In the Congratulations dialog box, select Continue to Sign In.
- 5. In the Login dialog box, enter your user name and password, and select Sign In.
- 6. In the Enable Secure Verification dialog box, select Enable Secure Verification.
- 7. In the Select Your Default Secure Verification Method dialog box, select Mobile App.
- On your mobile device, open Oracle Mobile Authenticator, Google Authenticator, or Microsoft Authenticator.

Note:

If you need to download the application, open the store used to download applications on your phone or tablet. Search for the application and download it. For example, open the App Store for an iPhone or Google Play Store for an Android phone. After you download the application keep it on your device to access an MFA code each time you sign in.

- In Oracle Mobile Authenticator, Google Authenticator, or Microsoft Authenticator, tap Scan a QR Code. When prompted, allow access to your camera.
- 10. Hold your device up to the QR code on your screen in the Download and Configure the Mobile App dialog box so the camera can focus and automatically scan the code. (You do not take a picture.) You should see the QR code come up on your camera screen as it focuses.
- After the authentication app scans the QR code, in the Successfully Enrolled dialog box, select Done. In Oracle Mobile Authenticator, Google Authenticator, or Microsoft Authenticator you see an identifier, your user name, and a six-digit code.



Note:

For security, the MFA code changes approximately every 30 seconds.

12. Sign in to Oracle Health Response Readiness.



4

Access Oracle Health Response Readiness

To sign in to Oracle Health Response Readiness you must enter your user name, password, and a multi-factor authentication (MFA) code. Once you activate your account, you can use email or a mobile device to access your MFA code.

At any time after you sign in, you can manage your profile or reset you password. Each portal automatically signs you out of the system after a set amount of time (for example, 1-8 hours). But, you can sign out of the system at any time.

Sign in to Oracle Health Response Readiness

Oracle Health Response Readiness uses multi-factor authentication (MFA) to ensure secure access to the portals. Once you activate your account, you can use email or a mobile device to access your MFA code. You enter your user name, password, and the code to sign in.

• Manage your profile

You can set or update the format for the date, time, time zone, and language that appear in the portal if necessary. The time zone and language are originally set when your user account is created.

Reset your password

You can reset your password if necessary (for example, if you forgot your password or if you were locked out of your account after five attempts to enter your password when signing in to Oracle Health Response Readiness). You can also ask an administrator to reset your password.

• Sign out of Oracle Health Response Readiness

Each Oracle Health Response Readiness portal automatically signs you out of the system after a set amount of time (for example, 1-8 hours). Once that time expires, you need to sign in again using multi-factor authentication. But, you can sign out at any time.

Sign in to Oracle Health Response Readiness

Oracle Health Response Readiness uses multi-factor authentication (MFA) to ensure secure access to the portals. Once you activate your account, you can use email or a mobile device to access your MFA code. You enter your user name, password, and the code to sign in.

Note:

- If you did not activate your account yet, see Activate your account.
- If you have not signed in for 180 days, your account is automatically disabled and you will not be able to sign in. Emails are sent with a 10-day and 5-day notice when you are reaching 180 days of inactivity. If you cannot sign in, contact your administrator for assistance.

To sign in:

1. Open Oracle Health Response Readiness in a browser to access the Sign In page.



If you do not know the web address for Oracle Health Response Readiness, check the Welcome email from Oracle. You used that email to set the password for your account. It includes a web address to Oracle Health Response Readiness. Select that link and bookmark it for future access.

Note:

Oracle Health Response Readiness supports the Google Chrome, Mozilla Firefox, Microsoft Edge, and Apple Safari browsers. An error appears if you use Internet Explorer.

2. In the Sign In page, enter your user name or email address and password, and select Sign In.

Note:

If you need to reset your password, select the **Forgot Password?** link and follow the instructions in **Reset your password**.

- If you use email to get your MFA code, an email is sent to you with a one-time verification passcode, and the Email Verification page opens. Proceed to step 3.
- If you use your mobile device with an authentication app (such as Oracle Mobile Authenticator, Google Authenticator, or Microsoft Authenticator) to get your MFA code, the **Mobile App Verification** page opens. Proceed to step 4.
- 3. If you use email to get your MFA code, do the following:
 - a. Locate the email sent to you from Oracle with your six-digit MFA code. The code expires in 15 minutes.
 - **b.** In the **Email Verification** page, enter the six-digit MFA code in the **Passcode** field, and select **Verify**. The Launchpad opens.
 - c. Proceed to step 5.
- 4. If you use your mobile device to get your MFA code, do the following:
 - a. Open the authentication app to see the six-digit MFA code.
 - **b.** In the **Mobile App Verification** page, enter the six-digit MFA code in the **Passcode** field, and select **Verify**. The Launchpad opens.
 - c. Proceed to step 5.
- 5. In the Launchpad, select a link to open a portal.

Note:

Only the portals you have access to appear in the Launchpad list.

Optionally, do either of the following:

- Select Profile to open the My Profile panel to view and update your account preferences, as described in Manage your profile.
- Select **Sign Out** to Sign out of Oracle Health Response Readiness.



Manage your profile

You can set or update the format for the date, time, time zone, and language that appear in the portal if necessary. The time zone and language are originally set when your user account is created.

To manage your profile:

1. Locate your user name (initials) on the right side of the banner and select **Profile** from the drop-down menu. The My Profile panel opens. For example:



			Ľ×
Preferences			
Report Date Format MM/DD/YYYY	•	Report Time Format HH24:MI	•
Time Zone / Region (UTC offset) US/Eastern (-04:00)			•
US/Eastern (-04:00), US/Central (-0	15:00). US/Mounta	n (-06:00). US/Pacific (-07:00). /	Asla/Koikata (+05:30)
Current Core Language (Territor) English (United States) [e	n @ n-us]		•
Sets the "core" translation language	and supports the l	eRion/reinion/reinfloage with se	annga.

- 2. In the **My Profile** panel, provide the following information:
 - Report Date Format
 - Report Time Format



- Time Zone / Region (UTC offset)—Select a time zone format and region.
- Current Core Language (Territory)—Required.
- 3. Select Save.

Reset your password

You can reset your password if necessary (for example, if you forgot your password or if you were locked out of your account after five attempts to enter your password when signing in to Oracle Health Response Readiness). You can also ask an administrator to reset your password.

To reset your password:

 Open Oracle Health Response Readiness in a browser to access the Sign In page. For example:

Identity domain 🕢	
User Name	
User name or email	
Password	
Password	
Forgot Password?	
Sign In	
Need help signing in?	

2. In the **Sign In** page, select **Forgot Password?**. The Forgot Your Password page opens. For example:



Identity domain 🕢	
Forgot Your Password?	
Having trouble with your passwo	rd? Reset it here.
What's your user name?	
Enter user name	
Next	
Cancel	

3. In the **What's your user name?** field, enter or confirm your user name and select **Next**. A password reset notification email is sent to the email address associated with your user name, and the Password Reset Notification Sent page opens. For example:

@oracle.com
Identity domain (1)
Password Reset Notification Sent.
A password reset notification will be sent to the recovery email address associated with your username @oracle.com . If you haven't received the password reset email, then please check your spam folder or contact your system administrator. You can also retry after 10 minutes.
Return to sign in

- 4. In the Password Reset Notification Sent page, select Return to sign in.
- Locate the password reset email notification email sent to you from Oracle, and select the Password Reset link in the email. The Password Reset page opens. For example:

Password Reset	t
Enter Password	
Password	0
	Required
Confirm Password Password	0
	Regulred
	1-1-1
Reset Password	
Deserved Delieve	
Password Policy	
Password:	
 Must be between 8 an 	d 25 characters
 Cannot be the same a 	s the last 4
passwords	
 Expires after 120 days 	5
 Password must include the 	
 1 uppercase letter 	0
 1 lowercase letter 	
1 number	
 1 special character 	
 Password must not contain 	the following:
 The user's first name 	
 The user's last name 	
 The user's username 	

- 6. Enter your new password in the Enter Password and Confirm Password fields. The password:
 - Must be between 8 and 25 characters
 - Cannot be the same as the last 4 passwords
 - Expires after 120 days
 - Must have at least 1 uppercase letter, 1 lowercase letter, 1 number, and 1 special character
 - Cannot contain the user's first name, last name, or user name
- 7. Select **Reset Password**. A confirmation message is sent to your email account, and the Sign In page opens.
- In the Sign In page, enter your user name (or email) and new password, and select Sign In. The Verification page opens.
- 9. In the Verification page, in the Passcode field, enter your MFA code, and select Verify. The Launchpad opens.
 - If you use email to get your MFA code, locate the email sent to you from Oracle with your six-digit MFA code. The code expires in 15 minutes.



- If you use your mobile device to get your MFA code, open the authentication app to see the six-digit MFA code.
- 10. In the Launchpad, select a link to open a portal.

Note:

Only the portals you have access to appear in the Launchpad list.

Sign out of Oracle Health Response Readiness

Each Oracle Health Response Readiness portal automatically signs you out of the system after a set amount of time (for example, 1-8 hours). Once that time expires, you need to sign in again using multi-factor authentication. But, you can sign out at any time.

To sign out of Oracle Health Response Readiness:

• Locate your user name (initials) on the right side of the banner and select **Sign Out** from the drop-down menu.



5 View the dashboard

When you open Self-Service Approval Portal, you see a dashboard with statistics that track how quickly requests move through the approval process.

· View the dashboard statistics on the requests

The dashboard shows bar graphs with statistics on the requests submitted by Self-Service Request Portal that track how quickly requests move through the approval process.

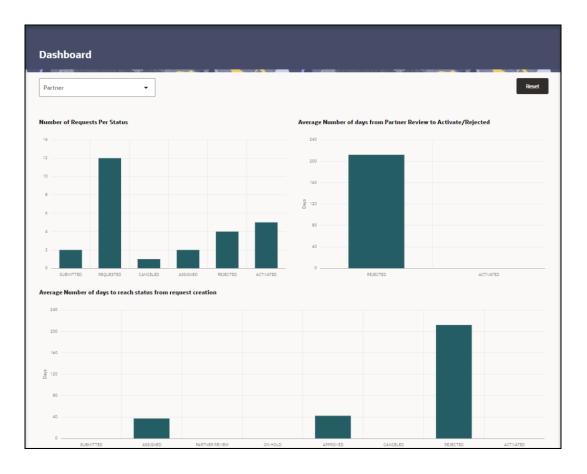
View the dashboard statistics on the requests

The dashboard shows bar graphs with statistics on the requests submitted by Self-Service Request Portal that track how quickly requests move through the approval process.

You can view statistics for a single partner or multiple partners. The statistics include the number of requests per status, the average number of days from partner review to activate/ rejected, and the average number of days to reach status from request creation.

To view the dashboard statistics:

1. Open the **Navigation** pane, and select **Dashboard**. The Dashboard page opens. For example:





2. At the top of the **Dashboard** page, in the **Partner** drop-down menu, select a partner (or leave the selection blank to show all Partners).

Note:

The **Partner** drop-down menu is visible only to administration users and reviewers; it does not appear on the page if you are a partner reviewer. If you are a partner reviewer, the Dashboard shows the statistics for your partner.

- 3. In each of the following sections, hover over the bar graph above a status to view the statistics. For descriptions of the statuses, see View the self-service statuses.
 - Number of Requests per Status
 - Average Number of days from Partner Review to Activate/Rejected
 - Average Number of days to reach status from request creation
- 4. Select a bar graph to open the **Requests** page to view the list of requests with the selected status. For more information, see View the details for a request.
- 5. Repeat steps 2 to 4, as needed. Selecting a different partner automatically refreshes the graphs.

Note:

Select **Reset** to clear the partner selection and show the graphs with data for all partners.



6

Prepare for approval

Before reviewing and approving requests submitted from Self-Service Request Portal, you can review the information submitted by the site. The information you can view and modify depends on your role.

Manage requests

As an approval or partner user, you can view a list of all the requests submitted for approval by Self-Service Request Portal, view the request details, and view and modify the site details for a request.

Manage reviewers

Administrators determine whether an approval user or partner user must review a request. After you open Self-Service Approval Portal, make sure you have enough users with the correct roles (self-service administrator or self-service reviewer).

Manage registrants

Approval users can, depending on their role as a self-service administrator or self-service reviewer, review the registrants to identify users who are valid, users who may have had trouble accessing Self-Service Request Portal due to, for example, a lost self-service site email, or users who are duplicates or are otherwise invalid.

Manage documents

Administrators can upload common and partner documents along with upload instructions, whether they will be automatically uploaded when a new site record is created, if they are mandatory, and if they are active.

Manage requests

As an approval or partner user, you can view a list of all the requests submitted for approval by Self-Service Request Portal, view the request details, and view and modify the site details for a request.

View the list of requests submitted for approval

As an approval or partner user, you can view a list of all the requests submitted for approval by Self-Service Request Portal. For each request, Self-Service Approval Portal provides many details about the request and its status.

• View the details for a request

For each request submitted for approval, you can view the status updates, site details, primary contact information, and receiving hours provided in Self-Service Request Portal, and the documents (if any) uploaded by an administrator or partner.

- View the status updates for a site request An approval user or partner user you can review the status updates for a site.
- View and modify the site details for a request An approval user or partner user can review and, if necessary and your role allows it, modify the self-service site details, primary contact information, and receiving hours entered for a request to correct any minor mistakes, such as typos, an incorrect address or telephone number.
- View the primary contact information for a site An approval user or partner user can view information for the primary contact for a site.



- View the receiving hours for a site An approval user or partner user can review the receiving hours specified for a site.
- View the documents for a site An approval user or partner user can view the documents (if any) uploaded by an administrator or partner for a site.

View the list of requests submitted for approval

As an approval or partner user, you can view a list of all the requests submitted for approval by Self-Service Request Portal. For each request, Self-Service Approval Portal provides many details about the request and its status.

To view the list of requests submitted for approval:

1. Open the **Navigation** pane, and select **Requests**. The All Requests page opens. For example:

All Reque	sts	30078					**************************************			
Q Search										
Created ‡≓	Site	Status	Partner	Federal PIN	Address Reviewed	Contact Reviewed	Documentation Reviewed	Receiving Hours Reviewed	Primary Contact Verified	Actions
10/26/2023 17:15 EDT	Site5	ACTIVATED	BelVita		Yes	Yes	Yes	Yes	Yes	O View
10/26/2023 07:58 EDT	Site2	ACTIVATED	BelVita		Yes	Yes	Yes	Yes	Yes	View

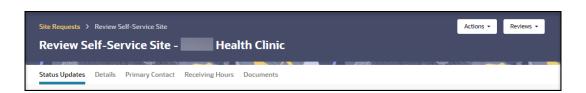
- 2. In the All Requests page, you can do the following:
 - To search for a specific request, enter text or numbers in the **Search** field, or select in the field, choose one or more criteria from the drop-down options, and provide any required details. The search results appear as soon as you enter the criteria.
 - To view the details for a request, find the request in the list, and select **View** in the **Actions** column. For more information, see View the details for a request.

View the details for a request

For each request submitted for approval, you can view the status updates, site details, primary contact information, and receiving hours provided in Self-Service Request Portal, and the documents (if any) uploaded by an administrator or partner.

To view the details for a request:

- 1. Open the Navigation pane, and select Requests. The All Requests page opens.
- 2. In the All Requests page, find the request you want to view, and select View in the Actions column. The Review Self-Service Site [Site Name] page opens. For example:





- 3. In the Review Self-Service Site [Site Name] page, select the following tabs:
 - Status Updates—Shows the requests associated with the site and the status for each. See View the status updates for a site request.
 - Details—Shows the site details; you can modify the details as needed. See View and modify the site details for a request.
 - Primary Contact—Shows information for the primary contact for the site. See View the primary contact information for a site.
 - Receiving Hours—Shows the days and hours the site can receive deliveries. See View the receiving hours for a site.
 - **Documents**—Shows the documents (if any) uploaded by an administrator or partner. You can review the document details, and then approve or reject the document as described in Approve or reject site documents.

View the status updates for a site request

An approval user or partner user you can review the status updates for a site.

To view the status updates for a site:

- 1. Open the **Navigation** pane, and select **Requests**. The All Requests page opens.
- In the All Requests page, find the request associated with the site whose status updates you want to view, and select View in the Actions column. The Review Self-Service Site -[Site Name] page opens.
- At the top of the Review Self-Service Site [Site Name] page, select the Status Updates tab. For example:

Site Requests >	Review	Self-Service Site			Actions	
Review Se	elf-Se	rvice Site -	Hea	lth Clinic		
Status Updates	Details	Primary Contact	Receiving Hours	Documents	HTT T (Tomorows and pole tomorow and addition to Palaget S ame (Tomorows)	
Status		Created 1		Justification		Created By
Submitted		03/01/2023 09:00) EST	Completed wizard for Self-Servi	ice Site	
Requested		03/01/2023 09:00) EST	Initial Request for Self Service S	ite	

To view descriptions for each status, see View descriptions of the request statuses.

View and modify the site details for a request

An approval user or partner user can review and, if necessary and your role allows it, modify the self-service site details, primary contact information, and receiving hours entered for a request to correct any minor mistakes, such as typos, an incorrect address or telephone number.

To view and modify the site details:

- 1. Open the Navigation pane, and select Requests. The All Requests page opens.
- In the All Requests page, find the request associated with the site you want to modify, and select View in the Actions column. The Review Self-Service Site - [Site Name] page opens.



3. At the top of the **Review Self-Service Site - [Site Name]** page, select the **Details** tab. For example:

Scroll down to view all the information on the page.

Site Regists > Review Self-Service Site - Reviews + Edit Details Review Self-Service Site - Health Clinic									
Status Updates Details Primary Contact	Receiving Hours Documents								
Status SUBMITTED	Status Date 03/01/2023 09:00								
Assigned Partner ORA Pharmacy	Site Health Clinic	Partner Organization	Partner Group						
Føderal PIN	State PIN	National Provider (D (NP)	Rights DEFAULT						
License	License Expiration Date								
Site Type [2] Correction Health Center									

4. At the top right, select Edit Details. The Maintain Site Details panel opens. For example:

Note:

The **Maintain Site Details** panel includes multiple sections including Site Details, Physical Address, Primary Contact (Requestor) Details, and Business Hours. Scroll down to view all the sections. Select a tab at the top of the panel to show all the sections or just one section.

Maintain Site Details			
Show All Site Details Primary Contact Details Business Hours			
Site Health Clinic		Partner ORA Pharmacy	•
	Required		Required
Partner Group Id	-	Partner Organization Id	-
Federal PIN (If known) State PIN (If know	m)	National Provider ID (NPI)	Non-Public
	One or Both Required		
Site Type	•	Setting(s) where this location will administer products (select all that apply)	•
[2] Correction Health Center	Required	[2] College/University ×	Required
Pharmacy Type		Population(s) served by this location (select all that apply)	
		[2] General Adult Population X	Required
License Expiration License MM/DD/YY	on Date		
Physical Address			
Address Line 1			
Address Line Address Line Required			
City State -	Zip		
	Required		
		Loading Dock Public Address	
Special Instructions		Yes No Yes No	
The Receiving Email and Phone must be monitored for communications fro	m the distribution center.		
Receiving Email			
			Cancel Save

- 5. At the top of the Maintain Site Details panel, update the following site details, as needed:
 - Site—Required.
 - Partner—Required.



- Partner Group Id
- Partner Organization Id
- Federal PIN (If known)
- State PIN (If known)
- National Provider ID (NPI)
- Non-Public
- Site Type—Required.
- Setting(s) where this location will administer products (select all that apply)— Required.
- Pharmacy Type
- **Population(s) served by this location (select all that apply)**—Required.
- License
- License Expiratrion Date—Select the calendar icon to select a date.
- 6. In the Physical Address section, update the following information, as needed:
 - Address Line 1—Required.
 - Address Line 2
 - City
 - State
 - Zip—Required.
 - Special Instructions
 - Loading Dock—Select Yes or No.
 - **Public Address**—Select **Yes** or **No**. You can set one physical address per site to be a public address (for use by external product tracking applications). You cannot set a hub address as a public address.
 - Receiving Email
 - Receiving Phone
 - Receiving Extension
 - Receiving Fax
- 7. In the **Approximate number of patients**/ clients routinely served by this location section, update the following information, as needed:
 - Enter a number into the field for each group of patients/clients, or select **Unknown**.
 - Enter a zero "0" if the location does not serve the age group.
 - Select **Not applicable** if needed (for example, for commercial vaccination service sites).
- 8. In the Primary Contact Details section, update the following information, as needed:
 - **First Name**—Required.
 - Last Name—Required.
 - **Email**—Required.
 - Job Title—Required.



- Phone
- Phone Extension
- Fax
- Contact Verified
- 9. In the **Business Hours** section, update the days and hours the address can receive deliveries, as needed:
 - For each day and in the **Holiday** row, if the location is open 24 hours, in the **24 Hours** field, select the toggle button until the white button appears on the right. When you select this option, the Opening and Closing drop-down menus are not available.
 - For each day and in the Holiday row, if the location is not open 24 hours, in the 24 Hours field, select the toggle button until the white button appears on the left. When you select this option, the Opening and Closing drop-down menus are available.
 - Select the opening time from the **Opening 1** drop-down menu, and select the closing time from the **Closing 1** drop-down menu.
 - Use the Opening 2 and Closing 2 drop-down menus if the location has separate opening periods. For example, if your location is open Monday through Friday with a daily lunch closure.
- 10. Select Save.

View the primary contact information for a site

An approval user or partner user can view information for the primary contact for a site.

To view the primary contact for a site:

- 1. Open the Navigation pane, and select Requests. The All Requests page opens.
- In the All Requests page, find the request associated with the site whose primary contact information you want to view, and select View in the Actions column. The Review Self-Service Site - [Site Name] page opens.
- 3. At the top of the **Review Self-Service Site [Site Name]** page, select the **Primary Contact** tab. For example:

Site Requests >		ielf-Service Site rvice Site –	Hea	lth Clinic	c			Actions -	Reviews
Status Updates	Details	Primary Contact	Receiving Hours	Documents			1994510 1077775-557405455		
First Name			Last Name	2					
Email			Job Title Doctor						
Phone Info									
Phone		Phone Extension	Fax						

4. If you need to modify the primary contact, see View and modify the site details for a request.



View the receiving hours for a site

An approval user or partner user can review the receiving hours specified for a site.

To view the receiving hours for a site:

- 1. Open the Navigation pane, and select Requests. The All Requests page opens.
- In the All Requests page, find the request associated with the site you want to modify, and select View in the Actions column. The Review Self-Service Site - [Site Name] page opens.
- 3. At the top of the **Review Self-Service Site [Site Name]** page, select the **Receiving Hours** tab. For example:

Site Requests ゝ Re	view Self-Service Site				Actions • Reviews •
Review Self	-Service Site -	Health Clinic			
Status Updates De	tails Primary Contact Re	ceiving Hours Documents			
Monday	24 Hours On	Monday Opening 1	Monday Closing 1	Monday Closing 1	Monday Closing 2
Tuesday	24 Hours On	Tuesday Opening 1	Tuesday Closing 1	Tuesday Opening 2	Tuesday Closing 2

4. If you need to modify any receiving hours, see View and modify the site details for a request.

View the documents for a site

An approval user or partner user can view the documents (if any) uploaded by an administrator or partner for a site.

To view the documents for a site:

- 1. Open the Navigation pane, and select Requests. The All Requests page opens.
- In the All Requests page, find the request associated with the site whose documents you want to view, and select View in the Actions column. The Review Self-Service Site - [Site Name] page opens.
- 3. At the top of the **Review Self-Service Site [Site Name]** page, select the **Documents** tab. For example:

Site Requests >		f-Service Site	Health Cli	Create Documentation	Send Documentation Notification	Actions - Reviews -
Status Updates		Primary Contact Receiving	g Hours Documer	nts	Anno 1 97 - Anno 1979 - Anno 1970 - Anno 1979	
Q Search Status ‡≞	Mandatory	Name	Description	Documen	t Upload Comments	Actions
REQUESTED	Yes		Testing Common		Testing Common	Review
REQUESTED	Yes	Test Doc				Review
REQUESTED	Yes	STATE DOCUMENT	add state docu	ment	add state document	Review



- 4. To search for a specific document, enter text or numbers in the Search field, or select in the field, choose one or more criteria from the drop-down options, and provide any required details. The search results appear as soon as you enter the criteria.
- 5. If you need to modify any documents, see Manage documents or Approve or reject site documents.

Manage reviewers

Administrators determine whether an approval user or partner user must review a request. After you open Self-Service Approval Portal, make sure you have enough users with the correct roles (self-service administrator or self-service reviewer).

• View the list of reviewers

As an approval user (self-service administrator or self-service reviewer), you can view the list of approval users and partner users. As a partner user, you can view only the users for your partner.

• Add a reviewer

As an approval self-service administrator, you can add an administration reviewer to be available to review any request, and you can add a partner reviewer to be available to review any request within a partner.

Modify an administration reviewer

As an approval self-service administrator, you can modify the settings for an administration reviewer if necessary.

• Modify a partner reviewer

As an approval self-service administrator, you can modify the settings for a partner reviewer if necessary.

Inactivate a reviewer As an approval self-service administrator, you can inactivate an administration reviewer or partner reviewer if necessary. You cannot delete a reviewer.

View the list of reviewers

As an approval user (self-service administrator or self-service reviewer), you can view the list of approval users and partner users. As a partner user, you can view only the users for your partner.

For each reviewer, you can view the reviewer type (ADMIN or PARTNER), the partner name (if applicable), the reviewer's name, email address, and role (self-service administrator or self-service reviewer), and whether the reviewer is active.

To review the list of reviewers:

1. Open the **Navigation** pane, and select **Reviewers**. The Reviewers page opens. For example:



Reviewers						
			- 🔨 - 🚛 🦿 - 🖉 - 🖉 - 🖉 - 🖉			MORE CONTRACTOR
teviewers						
Q Search						
Reviewer Type	Partner	Name	Email	Role	Active	Action
PARTNER	LeafyGreens			Self-Service Administrator	Yes	Ø E
	LeafyGreens			Self-Service Reviewer	Yes	/ Ec

 To search for a specific reviewer, enter text or numbers in the Search field, or select in the field, choose one or more criteria from the drop-down options, and provide any required details. The search results appear as soon as you enter the criteria.

Add a reviewer

As an approval self-service administrator, you can add an administration reviewer to be available to review any request, and you can add a partner reviewer to be available to review any request within a partner.

To add a reviewer:

1. Open the **Navigation** pane, and select **Reviewers**. The Reviewers page opens. For example:

Reviewers						Create
	en di mananan kasan di m inanan kumutina		etasati Parisis			
Q Search]	Ŀ
Reviewer Type	Partner	Name	Email	Role	Active	Actions
PARTNER	LeafyGreens			Self-Service Administrator	Yes	🖉 Edit
PARTNER	LeafyGreens			Self-Service Reviewer	Yes	/ Edit

2. In the **Reviewers** page, at the top right, select **Create**. The Maintain Reviewers panel opens. For example:

Maintain Reviewers	
Reviewer Type	•

- To add an Administration Reviewer, proceed to step 3.
- To add a **Partner Reviewer**, proceed to step 4.

Note:

Different fields show in the panel depending on your selection.



3. In the Maintain Reviewers panel, in the Reviewer Type drop-down menu, select Administration Reviewer. The Maintain Reviewers panel refreshes. For example:

Maintain Reviewers	
Administration Reviewer Instructions	
Reviewer: Approver user must already be created as an Administrative Portal Us Super User.	ser or
Roles: Administrators are the only ones who can activate an "Approved" Site.	
Reviewer Type Administration Reviewer	•
Reviewer	-
	Required
User Role	•
	Required

Provide the following information, and then proceed to step 5:

- **Reviewer**—Required. Select a user from the drop-down menu.
- User Role—Required. Select Self-Service Administrator or Self-Service Reviewer. Users with either role can activate an approved site request.
- 4. In the Maintain Reviewers panel, in the Reviewer Type drop-down menu, select Partner Reviewer. The Maintain Reviewers panel refreshes. For example:

Maintain Reviewers	
Partner Reviewer Instructions	
Reviewers: Partner Reviewer must already be created as a Partner Portal User. Partner: Will be automatically limited to Partners that the Reviewer is assigned Administration Users can optionally be assigned to any Self-Service Partner. If are not assigned to a specific Partner they will be able to review all requests.	to.
Note: Only people not already assigned as reviewers will be listed. If you are a Partner Administrator only reviewers associated to your Partner wil displayed.	l be
Reviewer Type	
Partner Reviewer	•
Partner	-
	Required
Reviewer	•
	Required
User Role	•
	Required

Provide the following information:

- **Partner**—Required. Select a partner from the drop-down menu.
- **Reviewer**—Required. Select a user from the drop-down menu.
- User Role—Required. Select Self-Service Administrator or Self-Service Reviewer. Users with either role can activate an approved site request.
- 5. Select Create.

Modify an administration reviewer

As an approval self-service administrator, you can modify the settings for an administration reviewer if necessary.

To modify an administration reviewer:

- 1. Open the Navigation pane, and select Reviewers.
- 2. In the **Reviewers** page, find the administration reviewer you want to modify, and select **Edit** in the **Actions** column. The Maintain Reviewers panel opens. For example:



Maintain Reviewers
O Administration Reviewer Instructions
Reviewer: Approver user must already be created as an Administrative Portal User or
Super User. Roles: Administrators are the only ones who can activate an "Approved" Site.
Reviewer Type Administration Reviewer Reviewer
User Role Self-Service Administrator
Required
Active
Yes No

- 3. In the Maintain Reviewers panel, update the following information as needed:
 - Reviewer Type—Read-only. Shows Administration Reviewer.
 - Reviewer—Read-only. Shows the user name and email of the reviewer.
 - User Role—Required. Select Self-Service Administrator or Self-Service Reviewer. Users with either role can activate an approved site request.
 - Active—Select Yes or No.
- 4. Select Save.

Modify a partner reviewer

As an approval self-service administrator, you can modify the settings for a partner reviewer if necessary.

To modify a partner reviewer:

- 1. Open the Navigation pane, and select Reviewers.
- 2. In the **Reviewers** page, find the partner reviewer you want to modify, and select **Edit** in the **Actions** column. The Maintain Reviewers panel opens. For example:



Mai	ntain Reviewers
0	Partner Reviewer Instructions
	Reviewers : Partner Reviewer must already be created as a Partner Portal User. Partner : Will be automatically limited to Partners that the Reviewer is assigned to. Administration Users can optionally be assigned to any Self-Service Partner. If they are not assigned to a specific Partner they will be able to review all requests.
	Note: Only people not already assigned as reviewers will be listed. If you are a Partner Administrator only reviewers associated to your Partner will be displayed.
	ver Type ner Reviewer
Faru	
Partne	er en
ORA	Pharmacy
Review	ver
_	
	r Role f-Service Reviewer
	Required
Active	
Yes	s No

- 3. In the Maintain Reviewers panel, update the following information as needed:
 - Reviewer Type—Read-only. Shows Partner Reviewer.
 - **Partner**—Read-only. Shows the name of the partner.
 - **Reviewer**—Read-only. Shows the user name and email of the reviewer.
 - User Role—Required. Select Self-Service Administrator or Self-Service Reviewer. Users with either role can activate an approved site request.
 - Active—Select Yes or No.
- 4. Select Save.

Inactivate a reviewer

As an approval self-service administrator, you can inactivate an administration reviewer or partner reviewer if necessary. You cannot delete a reviewer.

To inactivate a reviewer:

1. Open the Navigation pane, and select Reviewers.



- 2. In the **Reviewers** page, find the administration or partner reviewer you want to inactivate, and select **Edit** in the **Actions** column. The Maintain Reviewers panel opens.
- 3. In the Maintain Reviewers panel, in the Active field, select No. For example:



4. Select Save.

Manage registrants

Approval users can, depending on their role as a self-service administrator or self-service reviewer, review the registrants to identify users who are valid, users who may have had trouble accessing Self-Service Request Portal due to, for example, a lost self-service site email, or users who are duplicates or are otherwise invalid.

• View the list of registrants

As an approval user (self-service administrator or self-service reviewer), you can assess the registrants submitted by Self-Service Request Portal to identify users who have submitted their site information, who need to have their self-service site email re-sent, or who may be duplicates or are otherwise invalid.

• View the details for a registrant

As an approval self-service administrator, you can view the details for a respondent or nonrespondent registrant.

- Delete a non-respondent registrant
 As an approval self-service administrator, you can delete non-respondent registrants who you determine are not genuine users because they are duplicates or are otherwise invalid.
- View the list of deleted registrants
 As an approval user, you can view a list of deleted registrants, which is maintained for
 auditing purposes.

View the list of registrants

As an approval user (self-service administrator or self-service reviewer), you can assess the registrants submitted by Self-Service Request Portal to identify users who have submitted their site information, who need to have their self-service site email re-sent, or who may be duplicates or are otherwise invalid.

To view a list of all the registrants submitted by Self-Service Request Portal:

1. Open the **Navigation** pane, and select **Registrants**. The Registrants page opens. For example:



Registrants										
following users are eng	aged in the Self-Service Site s				15 22/11 7 4224 5 1.41143					
	-	id are visible only to appropriate review	wing committee.							
		formation and are visible to everyone		be purged if ner	cessary.					
	espondent and determined thei a valid user then please inactiva	ir email is incorrect, then please inacti-	vate the record an	d have them ree	nter their details.					
ou do not believe they are re are no means to manag		ite trem.								
e are no means to manag		ae ment.							1	.4.
		as men.]	¥
re are no means to manag		Respondent	Status	First Name	Last Name	Job Title	Phone	Phone Extension	Fax	Actions
Q Search	ge Inactivated users.		Status ACTIVATED	First Name SelfService	Last Name SiteRequester	Job Title Director	Phone		Fax	

- 2. To search for a specific registrant, enter text or numbers in the **Search** field, or select in the field, choose one or more criteria from the drop-down options, and enter any required details. The search results appear as soon as you enter the criteria.
- 3. In the **Respondent** column, review whether the registrants are shown as a **Respondent** or **Non-Respondent**.
 - Respondent—Users who have submitted their site information.
 - Non-Respondent—Users who have not submitted their site information.
- 4. For a Non-Respondent user, do one of the following:
 - If a non-respondent provided incorrect information, or has trouble accessing the Self-Service Request Portal, an administrator can re-send their self-service site email so that they can re-submit their details.
 - If you determine that a non-respondent is not a genuine user (they are a duplicate or are invalid for any reason), you can delete them as described in Delete a nonrespondent registrant.
- 5. To view the details for a **Respondent** or **Non-Respondent** user, find the person in the list, and select **Edit** in the **Actions** column. The Maintain Registrants panel opens. For example:



Maintain Registrants	5			
Respondent Respondent				
Created 26-OCT-2023 05:03PM		Status ACTIVATED		
Email				
First Name SelfService		Last Name SiteRequeste	r	
Phone	Phone Extension		Fax	
Job Title Director Created by System on 09/29/2023 Updated by System on 09/29/2023	10:25 EDT \$ 10:25 EDT			
			[Cancel



L

6. In the Maintain Registrants panel, you can view details and status for the registrant.

Note:

If a non-respondent's email is incorrect or they are not a valid user, you can delete them as described in Delete a non-respondent registrant.

View the details for a registrant

As an approval self-service administrator, you can view the details for a respondent or nonrespondent registrant.

To view the details for a registrant:

- 1. Open the **Navigation** pane, and select **Registrants**. The Registrants page opens.
- 2. In the **Registrants** page, find the registrant (respondent or non-respondent) you want to modify, and select **Edit** in the **Actions** column. The Maintain Registrants panel opens.
- 3. In the Maintain Registrants panel, update the following information as needed:
 - **Respondent**—Read-only. Shows Respondent or Non-Respondent.
 - Created—Read-only.
 - Status—Read-only.
 - Email
 - First Name
 - Last Name
 - Phone
 - Phone Extension
 - Fax
 - Job Title
- 4. Select Save.

Delete a non-respondent registrant

As an approval self-service administrator, you can delete non-respondent registrants who you determine are not genuine users because they are duplicates or are otherwise invalid.

To delete a non-respondent registrant:

- 1. Open the **Navigation** pane, and select **Registrants**. The Registrants page opens.
- In the Registrants page, find the Non-Respondent registrant you want to delete, and select Edit in the Actions column. The Maintain Registrants panel opens. For example:



Maintain Registrants	;			
Respondent Non-Respondent				
Created 26-OCT-2023 04:48PM		Status SIGN-UP		
Email				
First Name SelfService		Last Name SiteRequeste	r	
Phone	Phone Extensio	n	Fax	
Job Title Director				
Created by System on 09/29/2023 Updated by System on 09/29/2023	10:25 EDT 10:25 EDT			
			Cancel	Delete

- 3. Select Delete.
- 4. In the confirmation dialog box, select **Delete**.

View the list of deleted registrants

As an approval user, you can view a list of deleted registrants, which is maintained for auditing purposes.

To view the list of deleted registrants:

1. Open the **Navigation** pane, and select **Registrants**. The Registrants page opens. For example:

Respondents: Have submit Non-Respondents: Have n	ed in the Self-Service Site sign up ted their Site information and are to tot yet submitted their Site informat ordent and determined their email did user the observations the	visible only to appropriate review ation and are visible to everyone iil is incorrect, then please inactiv	and may also car		,					1964-197 9 - 1974 - 1975 - 19
Respondents: Have submit Non-Respondents: Have n	tted their Site information and are v iot yet submitted their Site information condent and determined their emai	visible only to appropriate review ation and are visible to everyone iil is incorrect, then please inactiv	and may also car		,					
Respondents: Have submit Non-Respondents: Have n	tted their Site information and are v iot yet submitted their Site information condent and determined their emai	visible only to appropriate review ation and are visible to everyone iil is incorrect, then please inactiv	and may also car		,					
Non-Respondents: Have n	ot yet submitted their Site information	ation and are visible to everyone	and may also car		,					
have contacted a non-resp	ondent and determined their emai	il is incorrect, then please inactiv			,					
			ate the record ar	nd have them ree	enter their details.					
		200								
e are no means to manage li										
Q Search										<u></u> ⊥
								Phone		-
Created 1F	Email	Respondent	Status	First Name	Last Name	Job Title	Phone	Extension	Fax	Actions
10/26/2023 17:03		Respondent	ACTIVATED	SelfService	SiteRequester	Director				/ Edit
EDT		Respondent	ACTIVATED	Senservice	SiteRequester	Director				2 Eur
10/26/2023 16:56		Respondent	ACTIVATED	SelfService	SiteRequester	Director				/ Edit

2. At the top right, select **Deleted Registrants**. The Deleted Registrants page opens. For example:

Registrants > Delete Deleted Reg				Magnetes Secondar San Josefes S					
Q Search									*
Created	Email	Respondent	Status	First Name	Last Name	Title	Phone	Phone Extension	Fax
10/26/2023 16:36 1	EDT	Non-Respondent	INACTIVATED	SelfService	SiteRequester	Director			

3. To search for a specific registrant, enter text or numbers in the **Search** field, or select in the field, choose one or more criteria from the drop-down options, and enter any required details. The search results appear as soon as you enter the criteria.

Manage documents

Administrators can upload common and partner documents along with upload instructions, whether they will be automatically uploaded when a new site record is created, if they are mandatory, and if they are active.

• View the documents

As an approval user (self-service administrator or self-service reviewer), you can view the list of common and partner documents uploaded by an administrator.

- Add a document
 As an approval self-service administrator, you can add a common or partner document to be added with all new requests.
- Modify a document

As an approval self-service administrator, you can modify the settings for a common document that was uploaded by an administrator, or a partner document that was uploaded by an administrator or a partner.



• Inactivate a document

As an approval self-service administrator, you can inactivate (disable) a common or partner document if necessary. You cannot delete a document.

View the documents

As an approval user (self-service administrator or self-service reviewer), you can view the list of common and partner documents uploaded by an administrator.

- Common documents are the defaults and are available for any new request.
- **Partner documents** are available for each partner. Partner reviewers see only the partner documents specified for their partner; they do not see the common documents.

To view the uploaded common and partner documents:

1. Open the **Navigation** pane, and select **Documents**. The Documents page opens. For example:

Documents									Create
Documents									*
Created 1=	Document Type	Partner	Name	Description	Upload Instructions	Auto Add	Mandatory	Active	Actions
12/14/2022 14:21 EST	PARTNER	LeafyGreens	DRIVERS LICENCE	optional, auto add	instructions to upload 2	Yes	Yes	Yes	🖉 Edit

2. To search for a specific document, enter text or numbers in the **Search** field, or select in the field, choose one or more criteria from the drop-down options, and provide any required details. The search results appear as soon as you enter the criteria.

Add a document

As an approval self-service administrator, you can add a common or partner document to be added with all new requests.

To add a common or partner document to be included with all new requests:

- 1. Open the Navigation pane, and select Documents.
- 2. In the **Documents** page, at the top right, select **Create**. The Maintain Documents panel opens. For example:



Maintain Documents	
Document Type COMMON	•
·	Required
Name	
	Required
Description	
	//
Upload Instructions	
	//
Auto Add	
Yes No	
Mandatory	
Yes No	
Active	
Yes No	
	Carrol
	Cancel Create



- 3. In the Maintain Documents panel, provide the following information:
 - Document Type—Required. Select COMMON or PARTNER.
 - **Partner**—Required. Appears only if you select **PARTNER** in the **Document Type** drop-down menu.
 - Name—Required.
 - Description
 - Upload Instructions
 - Auto Add—Select Yes or No to indicate whether the document will be added when a site request is created. Documents not added automatically can be added manually at a later time.
 - Mandatory—Select Yes or No to indicate whether the document is required. All
 mandatory documents must be set to Yes before they can be submitted.
 - Active—Select Yes or No.
- 4. Select Create.

Modify a document

As an approval self-service administrator, you can modify the settings for a common document that was uploaded by an administrator, or a partner document that was uploaded by an administrator or a partner.

To modify the settings for a common or partner document:

- 1. Open the Navigation pane, and select Documents.
- 2. In the **Documents** page, find the document you want to modify, and select **Edit** in the **Actions** column. The Maintain Documents panel opens. For example:



Maintain Documents
Document Type PARTNER
Partner ORA Pharmacy
Name STATE DOCUMENT
Description add state document
Upload Instructions please upload file
Auto Add Yes No
Yes No
Active Yes No
Cancel Save

- 3. In the **Maintain Documents** panel, update the following information, as needed:
 - **Document Type**—Read-only. Shows **COMMON** or **PARTNER**.
 - **Partner**—Read-only. Shows the name of the partner. Appears only for PARTNER document types.



- Name—Read-only.
- Description
- Upload Instructions
- Auto Add—Select Yes or No to indicate whether the document will be added when a site request is created. Documents not added automatically can be added manually at a later time.
- **Mandatory**—Select **Yes** or **No** to indicate whether the document is required. All mandatory documents must be set to Yes before they can be submitted.
- Active—Select Yes or No.
- 4. Select Save.

Inactivate a document

As an approval self-service administrator, you can inactivate (disable) a common or partner document if necessary. You cannot delete a document.

To inactivate a document:

- 1. Open the Navigation pane, and select Documents. The Documents page opens.
- 2. In the **Documents** page, find the document you want to inactivate, and select **Edit** in the **Actions** column. The Maintain Documents page opens.
- 3. In the Maintain Documents panel, in the Active field, select No. For example:



4. Select Save.

7 Approve requests

For each request submitted by Self-Service Request Portal, there are a series of actions and reviews that you use to verify the request details before you approve and activate the request. The actions and reviews available to you depend on your role and the status of the request.

You can choose to use a one-time wizard to guide you through the approval process. Or, you can perform the review and approval tasks manually and in any order.

- Approval process To approve a request you perform a series of actions and reviews on the information submitted with the request.
- Review and approve a request with the wizard

Self-Service Approval Portal provides a wizard that guides you through the request approval process. The wizard is only available for approval users. Use the wizard to review and approve a request as quickly as possible.

• Perform the actions required for approval

The approval process requires that you perform a series of actions on the information submitted by Self-Service Request Portal. The actions are dependent on whether you are an administration reviewer or partner reviewer.

 Perform the reviews required for approval The approval process requires that you perform a series of reviews on the information submitted by Self-Service Request Portal. The reviews are the same regardless of your role as an administration reviewer or partner reviewer.

Approval process

To approve a request you perform a series of actions and reviews on the information submitted with the request.

To approve a request:

- Open the request—Open a request to view the request details, which include the actions and reviews available to perform on the request, the information submitted by Self-Service Request Portal, and access to details on the self-service site. For more information, see View the details for a request.
- **Perform the actions required for approval**—You must perform a series of actions on the information submitted in the request. The actions available to you depend on your role as an approval user (self-service administrator or self-service reviewer) or partner user (self-service administrator or self-service reviewer). For more information, see:
 - Review and approve a request with the wizard—Available for approval users. The wizard guides you through the required reviews and actions to help you approve a request as quickly as possible.
 - Perform the actions required for approval—Available for approval and partner users.
 Perform the actions required for approval manually, one at a time.
- **Perform the reviews required for approval**—You must perform a series of reviews on the site details, site address, and the documentation submitted with the request. The reviews are the same regardless of your role as an approval user (self-service



administrator or self-service reviewer) or partner user (self-service administrator or self-service reviewer). For more information, see Perform the reviews required for approval.

Note:

After a request is approved and activated, you can you can no longer change it. You can, however, continue to view the request details, as needed.

Review and approve a request with the wizard

Self-Service Approval Portal provides a wizard that guides you through the request approval process. The wizard is only available for approval users. Use the wizard to review and approve a request as quickly as possible.

Alternatively, you can perform all the reviews and actions required to approve a request manually, as described in Perform the actions required for approval and Perform the reviews required for approval.

To review and approve a request with the wizard:

- 1. Open the Navigation pane, and select Requests.
- 2. In the **Requests** page, find the request you want to approve, and select **View** in the **Actions** column.
- 3. In the **Review Self-Service Site [Site Name]** page, open the wizard. See Open the wizard.
- 4. In the wizard, perform the following steps:
 - a. Assign the request to a partner so that reviewers associated with that site can review the request details. See Step 1: Assign Partner.
 - **b.** Review site addresses against the site information in the request. You **should not find** a match with the site addresses. See Step 2: Review Site Matches.
 - c. Review site contacts against the site information in the request. You **should not find** a match with the Site Contacts. See Step 3: Review Contact Matches.
 - d. Review and confirm the days and business hours when deliveries will be accepted. See Step 4: Review Receiving Hours.
 - e. Review the documents that were uploaded by an administrator or partner. See Step 5: Review Documentation.
 - f. Complete the request approval processing by placing the request on hold, assigning the request to a partner for further review, rejecting, approving, or activating the request. See Step 6: Complete Processing.info

You can also exit the wizard without completing the approval process. You can complete the request approval and review steps by re-entering the wizard at a later time, or manually as described in Perform the actions required for approval and Perform the reviews required for approval.

• Open the wizard

You can use the wizard to review and approve a request as quickly as possible. The wizard is only available for approval users.

Step 1: Assign Partner

As an approval user, you can use the wizard to assign a self-service site to a partner so that reviewers associated with that site can review the associated request details.



• Step 2: Review Site Matches

As an approval user, you can use the wizard to check for a match between the site addresses uploaded by an administrator against the site information in the request. You **should not find** a match with the site addresses.

• Step 3: Review Contact Matches

As an approval user, you can use the wizard to check for a match between the site contacts uploaded by an administrator and the site information in the request. You **should not find** a match with the site contacts.

• Step 4: Review Receiving Hours

As an approval user, you can use the wizard to review and confirm the days and business hours when deliveries will be accepted.

- Step 5: Review Documentation As an approval user, you can use the wizard to review the documents that were uploaded by an administrator or partner.
- Step 6: Complete Processing

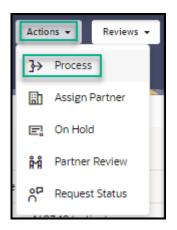
As an approval user, you can use the wizard to complete the request approval process by choosing to assign the request to a partner for further review, approving, activating, or rejecting the request. You can also exit the wizard without completing the approval process.

Open the wizard

You can use the wizard to review and approve a request as quickly as possible. The wizard is only available for approval users.

To open the wizard:

- 1. Open the Navigation pane, and select Requests. The All Requests page opens.
- 2. In the All Requests page, find the request you want to approve, and select View in the Actions column.
- 3. In the **Review Self-Service Site [Site Name]** page, at the top right, select **Process** from the **Actions** drop-down menu. For example:



The approval wizard opens, and shows a progress bar at the top of the page that highlights the steps required to approve the request and where you are in the process. For example:



Site Requests > Site Deta	ails				Exit
Site Details -	Self Service Site75				
🖉 🔹 🚛 🖉 🖉 🖉					
0	2	3		(5)	
Assign Partner	Review Site Matches	Review Contact Matches	Review Receiving Hours	Review Documentation	Complete Processing

- 4. Do one of the following:
 - To continue in the wizard, see Step 1: Assign Partner.
 - To leave the wizard, select **Exit**. You can complete the request approval and review steps by re-entering the wizard at a later time, or manually as described in Perform the actions required for approval and Perform the reviews required for approval.

Step 1: Assign Partner

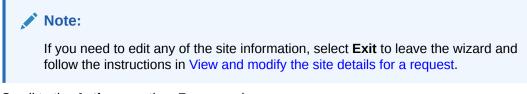
As an approval user, you can use the wizard to assign a self-service site to a partner so that reviewers associated with that site can review the associated request details.

To assign a site to a partner:

1. In the **Assign Partner** page, review the details entered by the requestor. For example:

1	(2)			(5)	(i)
Assign Partner	Review Site Matches	Review Contact Matches	Review Receiving Hours	Review Documentation	Complete Processi
• Information					
	tner. Only Partners that have Self-Se er then Reviewers associated with tha	rvice selected can be chosen. t Partner can review the Self-Service Sit	e.		
tus	Status Date				
IBMITTED	11/15/2023	5 11:18			
signed Partner	Site		Partner Organization	Partner Group	
lVita	Self Serv	ice Site75			
ieral PIN	State PIN		National Provider ID (NPI)	Rights	
				DEFAULT	
ense	License Expirati 10/11/2001		Special Instructions Please call before delivery.		
	10/11/200	·	Please can before derivery.		
e Type Commercial Provider					
ation Type 0] Public Health Clinic					
-					
ulation] General Adult Population					
armacy Type OMMUNITY] Community Clinic	:				
mber of children 18 years of age and yo	unger		Number of adults 19 – 64 years of age		
mber of adults 65 years of age and olde	r		Number of unique patients/clients seen per	week on average	
ated by dated by					
Physical (Not Verified)					





2. Scroll to the Actions section. For example:

Actions		
Assigned Partner Group	Assigned Partner Organization	-
Site Response Product Types and Programs		Add Response Product Type
COVID19 / Diagnostic Text to Treat Food Distribution Centers Long Term Care Pharmacy		
Note: If you update the Assigned Partner the documents associated with the Site may be changed.		
Justification Asigned Partner vertified, Asigned NEW Partner, Assigned Group		
Required remot remot remoting regime doup		Assign

- 3. Provide the following information:
 - Assigned Partner—Required. Select or change the partner to assign to this selfservice site. There is typically one partner per state. If you change the partner, the reviewers assigned to the existing partner will no longer see this site request. Also, the documents associated with the site may be changed. The request is added for the newly selected partner.
 - Assigned Partner Group—Select or change a partner group, if available. There may be groups within a partner.
 - Assigned Partner Organization—Select or change a partner organization, if available.
- 4. In the Site Response Product Types and Programs section, select Add Response Product Type to add a response product type for the site. The Maintain Response Product Type panel opens. For example:

Maintain Response Product Type	
Partner BelVita	
Site Self Service Site75	
Response Product Type	•
	Required
Site Programs	



- 5. In the Maintain Response Product Type panel, provide the following information:
 - **Partner**—Read-only.
 - Site—Read-only.
 - Response Product Type—Required.
 - **Site Programs**—Select one or more programs. The options appear after you select a response product type.
- 6. Select Add. The Maintain Response Product Type panel closes. In the Assign Partner page, the response product type you added appears in the Site Response Product Types and Programs section.
 - To add another response product type for the site, repeat steps 4 to 5.
 - To modify the details for a response product type, find it in the list, and on the right select the Ellipses and then Edit. The Maintain Response Product Type panel opens.
 - In the Add Response Product Type panel, update the information as described in step 5.
 - Select Save.
 - To delete a response product type, find it in the list, and on the right select the Ellipses and then Delete.
- 7. In the required **Justification** field, enter a description that describes your review of the entries on this page. You can enter text, or select a quick pick link (for example, Assigned Partner verified, Assigned NEW Partner, Assigned Group).
- 8. Select Assign. The wizard automatically advances to the next step.

Note:

To continue in the wizard, see Step 2: Review Site Matches. To leave the wizard select **Exit**.

Step 2: Review Site Matches

As an approval user, you can use the wizard to check for a match between the site addresses uploaded by an administrator against the site information in the request. You **should not find** a match with the site addresses.

To review the site addresses:

1. In the **Review Site Matches** page, in the **Site Details** section, review the details entered by the requestor. For example:

Site Requests > Site Deta Site Details-	Self Service Site75				Exit Previous
		3	(4)		
Assign Partner	Review Site Matches	Review Contact Matches	Review Receiving Hours	Review Documentation	Complete Processing
Information Review each of the Site A If none of the Site Addres However, if there is a poss If there are no records dis	ses are a likely match then click Reviewed. sible match then click Possible Match, and p	erform appropriate research.			
Site Details					
Status ASSIGNED	Status Date 11/15/2023	17:25			
Assigned Partner BelVita	Site Self Servi	ce Site75	Partner Organization	Partner Group	
Federal PIN	State PIN		National Provider ID (NPI)	Rights DEFAULT	
License	License Expiratio 10/11/2001	n Date	Special Instructions Please call before delivery.		
Created by Updated by					
Physical (Not V Email:	erified]				
Potential Matches with Si	te Addresses				

Note:

If you need to edit any of the information in the **Site Details** section, select **Exit** to leave the wizard and follow the instructions in View and modify the site details for a request.

2. Scroll to the Potential Matches with Site Addresses section. For example:

otential Mat	ches with Site Addresses											
Match Criteria 🕼	Partner	Grantee	Site	Federal PIN	Address 1	Address 2	City	County	State	Zip	Email	
Address2, Phone, Fax	Subbu Partner	781	Automated Self Service Site87			Suite #111	Atlanta		GA			
Address2, Phone, Fax	Subbu Partner	781	Automated Self Service Site46			Suite #111	Atlanta		GA			

3. Compare the information in the **Site Details** section at the top of the page with the information in the **Potential Matches with Site Address** section. Possible address matches appear in the **Potential Matches with Site Addresses** section.



4. Scroll to the **Actions** section. For example:



Information It is expected that you SHO	JLD NOT FIND a match with OHRR Site Addres	sses.	
Verified Address			
O Address is NOT verified			
O Address is verified			
Justification			
Possible Site Address match record four	d Devlewed against Site Addresses		

- 5. In the required Verified Address field, select one of the following options:
 - Address is NOT verified
 - Address is verified
- 6. In the required **Justification** field, enter a description that describes your review of the entries on this page. You can enter text, or select a quick pick link (for example, Possible Site Address match record found, Reviewed against Site Addresses).
- 7. Do one of the following:
 - Select Possible Match if one of the site addresses may be a match.
 - Select Reviewed if none of the site addresses are a match or a likely match, or if there are no records.

The wizard automatically advances to the next step.

Note:

To continue in the wizard, see Step 3: Review Contact Matches. To leave the wizard select **Exit**.

Step 3: Review Contact Matches

As an approval user, you can use the wizard to check for a match between the site contacts uploaded by an administrator and the site information in the request. You **should not find** a match with the site contacts.

To review the site contacts:

 In the Review Contact Matches page, in the Site Contacts section, review the details entered by the requestor. For example:



Site Requests > Site Deta					Exit Previous
Site Details -	Self Service Site75				
Ø	0		(4)	(5	6
Assign Partner	Review Site Matches	Review Contact Matches	Review Receiving Hours	Review Documentation	Complete Processing
Information Review each of the Contacts are However, If there is a poss If there are no records disp	e a likely match then click Reviewed . ible match then click Possible Match , and pe	rform appropriate research.			
Site Contacts					
Status ASSIGNED	Status Date 11/15/2023	17:31			
Assigned Partner BelVita	Site Self Servic	e Site75			
First Name	Last Name		Job Title Director		
Email	Mobile				
Phone	Phone Extension		Fax	User Status PENDING	
Created by Updated by					
Potential Matches with Ex	isting Site Contacts				

Note:

If you need to edit any of the information in the **Site Contacts** section, select **Exit** to leave the wizard and follow the instructions in View and modify the site details for a request.

2. Scroll to the **Potential Matches with Existing Site Contacts** section. For example:

tential Mat	ches with Existing Site Contacts											
Match Criteria ‡≒	Partner	Grantee Code	Site	Federal PIN	First Name	Last Name	Job Title	Email	Phone	Phone Extension	Fax	Active
First+Last, Phone, Fax	Subbu Partner	781	Automated Self Service Site83				Director					No
First+Last, Phone, Fax	LeafyGreens	LG1	Automated Self Service Site53				Director					No
first+Last, Phone, Fax	BelVita	BV3	Automated Self Service Site 13				Director					Yes

3. Compare the information in the **Site Contacts** section at the top of the page with the information in the **Potential Matches with Existing Site Contacts** section. Possible contact matches appear in the **Potential Matches with Existing Site Contacts** section.



You **should not find** a match with the site contacts.

4. Scroll to the **Actions** section. For example:



Information			
It is expected that you SHOULD NOT FI	ND a match with Site Contacts.		
Contact Verified			
O Primary Contact is NOT Correct			
O Primary Contact is Correct			
Justification			
Possible Contact match record found, Reviewed again	at Contacts		

- 5. In the required **Contact Verified** field, select one of the following options:
 - Primary Contact is NOT Correct
 - Primary Contact is Correct
- 6. In the required **Justification** field, enter a description that describes your review of the entries on this page. You can enter text, or select a quick pick link (for example, Possible Contact match record found, Reviewed against Contacts).
- 7. Do one of the following:
 - Select **Possible Match** if one of the site contacts may be a match.
 - Select Reviewed if none of the site contacts are a match or a likely match, or if there are no records.

The wizard automatically advances to the next step.

Note:

To continue in the wizard, see Step 4: Review Receiving Hours. To leave the wizard select **Exit**.

Step 4: Review Receiving Hours

As an approval user, you can use the wizard to review and confirm the days and business hours when deliveries will be accepted.

To review the days and hours for receiving deliveries:

1. In the **Review Receiving Hours** page, in the **Site Details** section, review the details entered by the requestor. For example:

AGMD			ANNE		() ()
Assign Partner	Review Site Matches	Review Contact Matches	Review Receiving Hours	Review Documentation	-
e Details					
us SIGNED	Status Date 11/15/2023	5 17:35	Assigned Partner BelVita	Site Self Serv	ice Site75
Physical Email:					
siness Hours					
Monday	24 Hours No	Monday Opening 1 9:00	Monday Closing 1 17:00	Monday Opening 2	Monday Closing 2
fuesday	24 Hours No	Tuesday Opening 1 9:00	Tuesday Closing 1 17:00	Tuesday Opening 2	Tuesday Closing 2
Vednesday	24 Hours No	Wednesday Opening 1 9:00	Wednesday Closing 1 17:00	Wednesday Opening 2	Wednesday Closing 2
Thursday	24 Hours No	Thursday Opening 1 9:00	Thursday Closing 1 17:00	Thursday Opening 2	Thursday Closing 2
riday	24 Hours No	Friday Opening 1 9:00	Friday Closing 1 17:00	Friday Opening 2	Friday Closing 2
Gaturday	24 Hours No	Saturday Opening 1	Saturday Closing 1	Saturday Opening 2	Saturday Closing 2
Sunday	24 Hours No	Sunday Opening 1	Sunday Closing 1	Sunday Opening 2	Sunday Closing 2
Holiday	24 Hours No	Holiday Opening 1	Holiday Closing 1	Holiday Opening 2	Holiday Closing 2

Note:

If you need to edit any of the receiving hours, select **Exit** to leave the wizard and follow the instructions in View and modify the site details for a request.

2. Scroll to the **Actions** section. For example:

Actions	
Verify Receiving Hours	
O Receiving Hours are NOT Correct	
O Receiving Hours are Correct	
Justification	
Receiving hours reviewed Require	d
	Reviewed

- 3. In the required Verify Receiving Hours field, select one of the following options:
 - Receiving Hours are NOT Correct
 - Receiving Hours are Correct
- 4. In the required **Justification** field, enter a description of your review of the entries on this page. You can enter text, or select a quick pick link (for example, Receiving hours reviewed).
- 5. Select **Reviewed**. The wizard automatically advances to the next step.



Note:

To continue in the wizard, see Step 5: Review Documentation. To leave the wizard select **Exit**.

Step 5: Review Documentation

As an approval user, you can use the wizard to review the documents that were uploaded by an administrator or partner.

To review the documentation:

 In the Review Documentation page, in the Site Details section, review the details entered by the requestor. For example:

Site Requests > Site Details						Exit Previous
Site Details - S	elf Service Site75	;				
Ø	o		Ø	⊘	6	
Assign Partner	Review Site Matches	Review C	ntact Matches	Review Receiving Hours	Review Documentation	Complete Processing
Information						
Review each of the documents	listed below.					
	en approved then click Reviewed . ng documents, or documents that ha	ve not been approved ther	click Documentation Incon	aplete, and perform appropriate	actions.	
If there are no records displaye	d click Documentation Incomplete i	f documentation is require	d, or Reviewed if no docume	ntation required.		
• Information						
This Site has certified that the	equired documents have previously	been provided.				
If you know that the required d	ocumentation has been provided the	en provide a justification ar	d click Reviewed.			
If you know that the required d	ocumentation has NOT been provide	d then provide a justificati	on and click Documentation	Incomplete, then proceed to Re	view Self-Service Site and click Send Documentation N	otification.
If you do not know whether do	cumentation has been provided then	provide a justification and	click Documentation Incom	plete, then on the next step of th	he wizard click Partner Review.	
ite Details						
tatus	Status Dat			isigned Partner	Site	
SSIGNED		2023 17:38		elVita	Self Service Site75	
locuments						
Name 1=	Mandatory	Auto Add State	s Docum	ent Upload Comments		Actions
TEST-Commo	n Yes	Yes REC	UESTED		Common	
	Yes	Yes REC	UESTED			
Test Doc	No	No REC	UESTED	Doc		
DOCUMENT - PHARMACY	Yes	No REC	UESTED	pharmacy docum	ent - mandatory, not auto	
	Yes	Yes REC	UESTED	optional, auto add		

- 2. In the **Documents** section, review the documents uploaded by the requestor and the status for each.
- 3. To view the document details, select a status in the **Action** column in the table (for example, **Review**). The Maintain Documents panel opens.
- 4. In the Maintain Documents panel, review the information in the Status, Name, Mandatory, Auto Add, Filename, and Document fields, and then do the following:
 - Select **Download** to download and view the document, if needed.
 - In the required **Justification** field, enter a description of your review of the entries on this page. You can enter text, or select a quick pick link (for example, Not all documents approved, All documents uploaded and approved, Documents already provided).

If you approved a previous request and already provided the documents by working directly with an approved partner, you do not need to provide the requested documents a second time.



- Select Reject if you do not approve the document.
- Select Approve if you approve the document.
- 5. Repeat steps 3 to 4 for each document, as needed.
- 6. Scroll to the Actions section. For example:

Actions	
Justification All documents uploaded and approved	
Not all documents approved , All documents uploaded and approved. Documents already provided Required	
	Documentation Incomplete Reviewed

 In the required Justification field, enter a description that describes your review of the entries on this page. You can enter text, or select a quick pick link (for example, Not all documents approved, All documents uploaded and approved, Documents already provided).

If you approved a previous request and already provided the documents by working directly with an approved partner, you do not need to provide the requested documents a second time.

- 8. Do one of the following:
 - Select Documentation Incomplete if there are missing documents, there are documents that are not approved, or documentation is required but no records appear in the page.
 - Select **Reviewed** if all of the documents are reviewed, or if documentation is not required.

The wizard automatically advances to the next step.

Note:

To continue in the wizard, see Step 6: Complete Processing. To leave the wizard select **Exit**.

Step 6: Complete Processing

As an approval user, you can use the wizard to complete the request approval process by choosing to assign the request to a partner for further review, approving, activating, or rejecting the request. You can also exit the wizard without completing the approval process.

To complete the request approval process with the wizard:

 In the Complete Processing page, review the instructions in the Information section. For example:



e Requests > Site Detail	self Service Site75				Previous		
######		Ø		o	O		
Assign Partner	Review Site Matches	Review Contact Matches	Review Receiving Hours	Review Documentation	Complete Proce		
Information							
	action based on the information below:						
Partner Review - select thi Note: An email will be sent	s option when you want the selected Partner to to all Reviewers associated to the Partner for re	o review the request before Activating. tview of the Self-Service Site.					
Approve - select this optio	n when everything has been successfully revie	wed and verified.					
Activate (if available) - The Note: An email will be sent	Site will be made active. to the Requestor. Once they log back in they wi	Il be able to enter orders and more.					
Reject - the request status will be changed, but it will not be removed. Note: An email will be sent to the Requestor. Once they log back in they will see the justification for the rejection							
Complete Processing - exit the integrated without stating and the status.							

2. Scroll to the Self-Service Site Details section. For example:

Self-Service Site Details			
Status ASSIGNED	Status Date 11/15/2023 17:41		
Assigned Partner BelVíta	Site Self Service Site75	Partner Organization	Partner Group
Federal PIN	State PIN	National Provider ID (NPI)	Rights DEFAULT
License	License Expiration Date 10/11/2001	Special Instructions Please call before delivery.	
Site Type [1] Commercial Provider			
Location Type [10] Public Health Clinic			
Population [2] General Adult Population			

- Review the information in the Self-Service Site Details section. This information was entered by the requestor.
- 4. Scroll to and review the information in the Site Address and Site Response Products Types and Programs sections. This information was entered by the requestor. For example:

Site Address	
Physical Email:	
Site Response Products Types and Programs	
COVID 19 / Diagnostic Test to Treat Food Diminution Centers Long Term Care Pharmacy	
Status Updates	

5. Scroll to and review the information in the **Status Updates**, **Reviews**, and **Verifications** sections. For example:



Status Updates			
Created	Status 🕼	Justification	Created By
11/15/2023 17:25 EST	ASSIGNED	Assigned Partner verified	
11/15/2023 11:18 EST	DOCUMENTS PROVIDED CERTIFICATION	User certifies that all documents have been provided	
11/15/2023 11:18 EST	REQUESTED	Initial Request for Self Service Site	
11/15/2023 11:18 EST	SUBMITTED	Completed wizard for Self-Service Site	
Reviews			
Created	Status 🕼	Justification	Created By
11/15/2023 17:31 EST	ADDRESS REVIEWED	Reviewed against Site Addresses	
11/15/2023 17:35 EST	CONTACT REVIEWED	Reviewed against Contacts	
11/15/2023 17:41 EST	DOCUMENTATION REVIEWED	All documents uploaded and approved	
11/15/2023 17:38 EST	RECEIVING HOURS REVIEWED	Receiving hours reviewed	
Verifications			
Created	Status I=	Justification	Created By
11/15/2023 17:35 EST	PRIMARY CONTACT VERIFIED	Reviewed against Contacts	
11/15/2023 17:31 EST	RECEIVING ADDRESS VERIFIED	Reviewed against Site Addresses	
11/15/2023 17:38 EST	RECEIVING HOURS VERIFIED	Receiving hours reviewed	
Actions			

6. Scroll to the Actions section. For example:

Actions			
Justification			
Partner review required. Site review complete Required			
Warning Note: This justification may be displayed to the Requestor!			
	On Hold	Partner Review Reject	Approve

- In the required Justification field, enter a description of your review of the entries on this page. You can enter text, or select a quick pick link (for example, Partner review required, Site review complete).
- 8. Choose one of the following options to complete the wizard steps:
 - Select On Hold if, for example, there will be a delay in processing by the site.
 - Select Partner Review if you want the selected partner to review the request before it is approved and activated. The partners associated with the request will now be able to see the request.

Note:

An email is sent to all reviewers associated to the partner for review of the Self-Service Site request.

 Select Reject if the request is invalid for any reason, the requestor is not responding, the request is a duplicate of an existing site, or there is incomplete documentation. The request status changes, but the request is not removed from Self-Service Approval Portal.

Note:

An email is sent to the requestor. When the requestor logs in to Site Portal they will see the justification for the rejection.

- Select Approve if all the information in the request has been successfully reviewed and verified. After you approve the request it can be activated by an approval selfservice administrator.
- Select Activate (if available) to make the site active in Site Portal. The Activate option is only available to approval self-service administrators for approved requests. An approval self-service administrator can, however, activate any request, not only those that are approved.

Note:

An email is sent to the requestor. The requestor can then sign in to Site Portal to order response products.

After you activate a request, you can no longer change it. You can, however, continue to view the request details, as needed, as described in View the details for a request.

 Select Exit at the top right to exit the wizard without completing the approval process. The wizard closes and the Review Self-Service Site - [Site Name] page for the request opens.

Note:

You can view and modify the request details, and complete the approval for the request at a later time, as described in View the details for a request, Perform the reviews required for approval, and Perform the actions required for approval.

Perform the actions required for approval

The approval process requires that you perform a series of actions on the information submitted by Self-Service Request Portal. The actions are dependent on whether you are an administration reviewer or partner reviewer.

The actions available to you depend on your role.

- If you are an administration reviewer, you can use the wizard to help guide you through the actions and reviews required to approve a request as quickly as possible. See Review and approve a request with the wizard.
- If you are an administration reviewer, the following actions are available for all requests:
 - Process
 - Assign
 - Partner Review
 - On Hold
 - Approve
 - Activate
 - Reject
- If you are a partner reviewer, the following actions are available for the requests associated with your site:



- On Hold
- Approve
- Reject
- Assign a partner to a site

As an approval user, you can assign or modify the assignment of a partner to a site so that reviewers associated with that site can review the associated request details. You can only choose a Self-Service Partner.

• Put a request on hold

Reviewers can put requests on hold if, for example, there will be a delay in processing by the site.

• Send a request for partner review

As an approval user, you can choose to have a partner review the request before it is approved and activated.

Approve a request

As an approval user, you can approve any request after all the information in the request is successfully reviewed and verified. An approved request can be activated by an approval administrator.

Activate a request

As an approval self-service administrator, you can activate any request. After a request is activated, approval or partner users can no longer change it. They can, however, continue to view the request details, as needed.

Reject a request

Reviewers can reject a request, if it is, for example, invalid for any reason, the requestor is not responding, the request is a duplicate of an existing site, or there is incomplete documentation.

Approve or reject site documents

For each request submitted for approval, you can view the site details, primary contact information, and receiving hours provided in Self-Service Request Portal, and the documents (if any) uploaded by an administrator or partner provides many details about the request and its status.

Assign a partner to a site

As an approval user, you can assign or modify the assignment of a partner to a site so that reviewers associated with that site can review the associated request details. You can only choose a Self-Service Partner.

To assign or modify the assignment of a partner to a site:

Note:

You can perform this action if you are an approval administrator or an approval reviewer.

- 1. Open the Navigation pane, and select Requests. The All Requests page opens.
- In the All Requests page, find the request you want to assign a partner to the site for, and select View in the Actions column. The Review Self-Service Site - [Site Name] page opens.



 In the Review Self-Service Site - [Site Name] page, at the top right select Assign Partner from the Actions drop-down menu. The Assign Partner panel opens. For example:

Assign Partner			
Information Assign this Site to a Ce	entral Partner. Only Partners that have §	Salf-Service salected can be chose	
-	to a Partner then Reviewers associated v		
Site Details			
Status SUBMITTED	Status Date 03/03/2023 16:47		
Assigned Partner ORA Pharmacy	Site Pharmacy LTD	Partner Group	Partner Organization
Federal PIN	State PIN	National Provider ID (NPI)	Non Public Yn Yes No
Site Type [3] Community Health Ce	enter		
Pharmacy Type			
License	License Expiration Date	Special Instructions	
Physical 123 Main St Email:	t		
Created by ADMIN on 03/03/202 Updated by Oracle on 10/03/202			
Status Updates			

- 4. Review the information in the **Site Details** section.
- 5. Scroll to and review the information in the **Status Updates** section. For example:



For descriptions of the statuses that appear in the panel, see View the self-service statuses.



Status Updates			
Created 1=	Status	Justification	Created By
03/03/2023 16:47 EST	SUBMITTED	Completed wizard for Self-Service Site	admin
03/03/2023 16:47 EST	SUBMITTED	Completed wizard for Self-Service Site	admin
03/03/2023 16:47 EST	DOCUMENTS PROVIDED CERTIFICATION	User certifies that all documents have been provided	admin
03/03/2023 16:47 EST	REQUESTED	Initial Request for Self Service Site	admin
Actions			

6. Scroll to the Actions section. For example:

Actions				
Assigned Partner ORA Pharmacy	•	Assigned Partner Group	•	Assigned Partner Organization 🔻
Site Response Product Ty	pes and Prog	rams		Add Response Product Type

- 7. In the Actions section, provide the following information:
 - Assigned Partner—Required. Select or change the partner to assign to this selfservice site. There is typically one partner per state. If you change the partner, the reviewers assigned to the existing partner will no longer see this site request. Also, the documents associated with the site may be changed. The request is added for the newly selected partner.
 - Assigned Partner Group—Select or change a partner group, if available. There may be groups within a partner.
 - Assigned Partner Organization—Select or change a partner organization, if available.
- 8. Scroll to the Site Response Product Types and Programs section. For example:



Site Respo	nse Product Types and Programs	4	Add Response F	Product Type
COVID	COVID19 / Vaccine Test 123	•		
MPX	Monkeypox / Therapeutic Test to Treat Food Distribution Centers Long Term Care Pharmacy	•		
Note: If you	update the Assigned Partner the documents associated with the Site may be o	hanged.		
Justificati	on			
Assigned Partne	er verified, Assigned NEW Partner, Assigned Group			
			Cancel	Assign

9. In the **Site Response Product Types and Programs** section, select **Add Response Product Type** to add a response product type for the site. The Add Response Product Type panel opens. For example:

Add Response Product Type	
Partner Bureau of Testers	
Site Test1010	
Response Product Type	•
	Required
Site Programs	

- **10.** In the **Add Response Product Type** panel, provide the following information:
 - Partner—Read-only.
 - Site—Read-only.
 - **Response Product Type**—Required.
 - **Site Programs**—Select one or more programs. The options appear after you select a response product type.



- 11. Select Add. In the Assign Partner panel, the response product type you added appears in the Site Response Product Types and Programs section.
 - To add another response product type for the site, select Add Response Product Type.
 - Repeat steps 9 to 10.
 - Proceed to step 12.
 - To modify the details for a response product type, find it in the list and on the right select the **Ellipses** and then **Edit**.
 - In the Add Response Product Type panel, update the information as described in step 10.
 - Select **Save** and proceed to step 12.
 - To delete a response product type, find it in the list and on the right select the **Ellipses** and then **Delete**.
 - In the Maintain Response Product Type panel, select Delete.
 - Proceed to step 12.
- 12. In the Assign Partner panel, in the required Justification field, enter a description that describes your review of the entries in the panel. You can enter text, or select a quick pick link (for example, Assigned Partner verified, Assigned NEW Partner, Assigned Group).
- **13.** Select **Assign**.

Put a request on hold

Reviewers can put requests on hold if, for example, there will be a delay in processing by the site.

- As an administration reviewer, you can put any request on hold.
- As a partner reviewer, you can put a request for your partner on hold.

To put a request on hold:

- 1. Open the **Navigation** pane, and select **Requests**. The All Requests page opens.
- 2. In the All Requests page, find the request you want to want to put on hold, and select View in the Actions column.
- 3. In the **Review Self-Service Site [Site Name]** page, at the top right, select **On Hold** from the **Actions** drop-down menu. The On Hold panel opens. For example:



On Hold			
Information If there is a delay in processis resumed in the Justification.	ng this Provider then click On Hol	d. It is recommended to add the exp	pected date the processing may be
Site Details			
Status SUBMITTED	Status Date 10/10/2023 10:26		
Assigned Partner Bureau of Testers	^{Site} Test1010	Partner Organization	Partner Group
Federal PIN	State PIN	National Provider ID (NPI)	Yes No
License	License Expiration Date		
Site Type [1] Commercial Provider			
Pharmacy Type			
Physical [Not Verified] Email			
Status Updates			

- 4. Review the information in the **Site Details** section.
- 5. Scroll to and review the information in the **Status Updates** section. For example:

For descriptions of the statuses that appear in the panel, see View the self-service statuses.

Status Updates			
Created 1	Status	Justification	Created By
10/10/2023 10:26 EDT	REQUESTED	Initial Request for Self Service Site	
10/10/2023 10:26 EDT	DOCUMENTS PROVIDED CERTIFICATION	User certifies that all documents have been provided	
10/10/2023 10:26 EDT	SUBMITTED	Completed wizard for Self-Service Site	
Actions			

6. Scroll to the Actions section. For example:

Actions	
Note: If you update the Assigned Partner, then Reviewers assigned to the existing Partner will n Secondly, the documents associated with the Site may be changed.	o longer be able to see this Site.
Justification	
Waiting for additional information, Waiting for Requestor	
	Cancel On Hold

7. In the required **Justification** field, enter a description that describes the status of the entries in the panel. You can enter text, or select a quick pick link (for example, Waiting for additional information, Waiting for Requestor).



We recommend that in the Justification field you enter the date you expect the processing to resume.

8. Select On Hold.

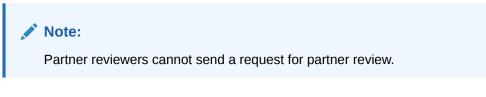


To resume processing, return to the request details for the site and perform the tasks remaining to approve the request. See Perform the actions required for approval.

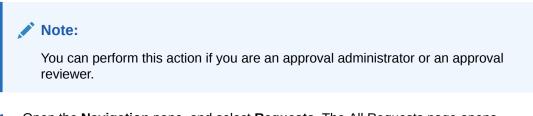


Send a request for partner review

As an approval user, you can choose to have a partner review the request before it is approved and activated.



To assign a request for partner review:



- 1. Open the Navigation pane, and select Requests. The All Requests page opens.
- In the All Requests page, find the request you want to send to a partner for review, and select View in the Actions column. The Review Self-Service Site - [Site Name] page opens.
- In the Review Self-Service Site [Site Name] page, at the top right, select Partner Review from the Actions drop-down menu. The Partner Review panel opens. For example:



Partner Review			
Site Details			
Status SUBMITTED	Status Date 10/10/2023 10:26		
Assigned Partner Bureau of Testers	^{Site} Test 1010	Partner Organization	Partner Group
Federal PIN	State PIN	National Provider ID (NPI)	Rights DEFAULT
License	License Expiration Date		
Site Type [1] Commercial Provider			
Pharmacy Type			
Physical [Not Verified] Email:			
Status Updates			

- 4. Review the information in the **Site Details** section.
- 5. Scroll to the **Status Updates** section. For example:

For descriptions of the statuses that appear in the panel, see View descriptions of the request statuses.

tatus Updates			
Created	Status 🚛	Justification	Created By
10/10/2023 10:26 EDT	DOCUMENTS PROVIDED CERTIFICATION	User certifies that all documents have been provided	
10/10/2023 10:26 EDT	REQUESTED	Initial Request for Self Service Site	
10/10/2023 10:26 EDT	SUBMITTED	Completed wizard for Self-Service Site	



6. Scroll to the Actions section. For example:

Actions	
Assigned Partner Bureau of Testers	
Note: If you update the Assigned Partner the documents associat	ted with the Site may be changed.
Justification	
Partner review required	
Created by	
Updated by 1 Updated by	
	Cancel Partner Review

- 7. In the required **Justification** field, enter a description that describes the status of the entries in the panel. You can enter text, or select a quick pick link (for example, Partner review required, Site review complete).
- 8. Select **Partner Review**. The partners associated with the request will now be able to see the request.

Note:

An email is sent to all reviewers associated to the partner for review of the request.

Approve a request

As an approval user, you can approve any request after all the information in the request is successfully reviewed and verified. An approved request can be activated by an approval administrator.

As a partner user, you can approve a request for your partner after all the information in the request is successfully reviewed and verified. An approved request can be activated by an approval self-service administrator.

To approve a request:

- 1. Open the Navigation pane, and select Requests. The All Requests page opens.
- 2. In the All Requests page, find the request you want to approve, and select View in the Actions column.
- In the Review Self-Service Site [Site Name] page, at the top right, select Request Status from the Actions drop-down menu. The Process Self-Service Site Request panel opens. For example:



Process Self-Service	e Site Request			
Information Next Steps				
Partner Review - selec		telow: ted Partner to review the request be Partner for review of the Self-Service		
On Hold- The Site will b	be On Hold.			
Approve - select this op	ption when everything has been succ	essfully reviewed and verified.		
	The Site will be made active. ent to the Requestor. Once they log b	ack in they will be able to enter orders	and more.	
	tus will be changed, but it will not be ent to the Requestor. Once they log b	removed. ack in they will see the justification fo	r the rejection	
Site Details				
Status SUBMITTED	Status Date 03/03/2023 16:47			
Assigned Partner ORA Pharmacy	Site	Partner Organization	Partner Group	
Federal PIN	State PIN	National Provider ID (NPI)	Von Public Yes No	
License	License Expiration Date	Special Instructions		
site Type [3] Community Health Cer	nter			
Pharmacy Type				
Number of children 18 years of age and younger Number of adults 19-64 years of age				
Number of adults 65 years of age and older Number of unique patients/clients seen per week on average				
Site Address				

- 4. Review the information in the **Site Details** section.
- 5. Scroll to and review the information in the **Site Address** section. For example:

Site Address		
Physical 123 M Email:	/lain St	
Created by ADMIN on 03/ Updated by Oracle on 10/		



6. Scroll to and review the information in the **Site Response Products Types and Programs** section. For example:

Site Respo	nse Products Types and Programs
COVID	COVID19 / Vaccine Test 123
МРХ	Monkeypox / Therapeutic Test to Treat Food Distribution Centers Long Term Care Pharmacy
Status Upd	lates

7. Scroll to and review the information in the **Status Updates**, **Reviews**, and **Verifications** sections. For example:

Note:

For descriptions of the statuses that appear in the panel, see View the self-service statuses.

Status Updates			
Created 1≓	Status	Justification	Created By
03/03/2023 16:47 EST	SUBMITTED	Completed wizard for Self-Service Site	admin
03/03/2023 16:47 EST	SUBMITTED	Completed wizard for Self-Service Site	admin
03/03/2023 16:47 EST	DOCUMENTS PROVIDED CERTIFICATION	User certifies that all documents have been provided	admin
03/03/2023 16:47 EST	REQUESTED	Initial Request for Self Service Site	admin
Reviews			

8. Scroll to and review the information in the **Reviews** section. For example:



Reviews			
Created ‡≓	Status	Justification	Created By
03/03/2023 16:47 EST	CONTACT POSSIBLE MATCH	Possible OHRR Contact match record found	admin
03/03/2023 16:47 EST	RECEIVING HOURS REVIEWED		admin
03/03/2023 16:47 EST	ADDRESS REVIEWED	Reviewed against OHRR Site Addresses	admin
03/03/2023 16:47 EST	DOCUMENTATION INCOMPLETE	Not all documents approved	admin
03/03/2023 16:47 EST	ADDRESS POSSIBLE MATCH	Possible OHRR Site Address match record found	admin
03/03/2023 16:47 EST	DOCUMENTATION REVIEWED	All documents uploaded and approved	admin
03/03/2023 16:47 EST	CONTACT REVIEWED	Reviewed against OHRR Contacts	admin
Verifications			

9. Scroll to and review the information in the **Verifications** section. For example:

Verifications			
Created 17	Status	Justification	Created By
03/03/2023 16:47 EST	RECEIVING ADDRESS VERIFIED	Reviewed against OHRR Site Addresses	admin
03/03/2023 16:47 EST	PRIMARY CONTACT VERIFIED	Reviewed against OHRR Contacts	admin
Actions			

10. Scroll to the **Actions** section. For example:

Actions					
Justification					
Partner review required, Site review complete					
A Warning					
Note: This justification may be displayed to the Reques	stor!				
				_	
	Cancel	On Hold	Partner Review	Reject	Approve

11. In the required **Justification** field, enter a description that describes the status of the entries in the panel. You can enter text, or select a quick pick link (for example, Partner review required, Site review complete).



12. Select Approve.

Activate a request

As an approval self-service administrator, you can activate any request. After a request is activated, approval or partner users can no longer change it. They can, however, continue to view the request details, as needed.

Note:

You can perform this action if you are an approval self-service administrator. Partner reviewers cannot activate requests.

To activate a request:

- 1. Open the Navigation pane, and select Requests. The All Requests page opens.
- 2. In the All Requests page, find the request you want to activate, and select View in the Actions column.
- 3. In the **Review Self-Service Site [Site Name]** page, at the top right, select **Request Status** from the **Actions** drop-down menu to open the **Request Status** panel.
- 4. Review the information in the Site Details, Site Address, and Site Response Products Types and Programs sections.
- 5. Scroll to and review the information in the **Status Updates**, **Reviews**, and **Verifications** sections.

Note:

For descriptions of the statuses that appear in the panel, see View descriptions of the request statuses.

- 6. Scroll to the **Actions** section, and in the required **Justification** field, enter a description that describes the status of the entries in the panel. You can enter text, or select a quick pick link (for example, Partner review required, Site review complete).
- 7. Select **Activate** to make the site active in Site Portal. An email is sent to the requestor. The requestor can then sign in to Site Portal to order response products.
 - After you activate a request, you can no longer change it. You can, however, continue to view the request details, as needed, as described in View the details for a request.
 - The Activate option is only available to approval self-service administrators for approved requests. An approval self-service administrator can, however, activate any request, not only those that are approved.

Reject a request

Reviewers can reject a request, if it is, for example, invalid for any reason, the requestor is not responding, the request is a duplicate of an existing site, or there is incomplete documentation.

- As an administration reviewer, you can reject any request.
- As a partner reviewer, you can reject a request for your partner.



To reject a request:

- 1. Open the **Navigation** pane, and select **Requests**. The All Requests page opens.
- 2. In the All Requests page, find the request you want to reject, and select View in the Actions column.
- 3. In the **Review Self-Service Site [Site Name]** page, at the top right, select **Request Status** from the **Actions** drop-down menu. The Process Self-Service Site Request panel opens. For example:

Process Self-Service	Site Request					
Information						
Next Steps						
	Partner Review - select this option when you want the selected Partner to review the request before Activating. Note: An email will be sent to all Reviewers associated to the Partner for review of the Self-Service Site.					
On Hold- The Site will be	On Hold- The Site will be On Hold.					
Approve - select this opti	on when everything has been succ	essfully reviewed and verified.				
Activate (if available) - Th Note: An email will be sen	ne Site will be made active. t to the Requestor. Once they log bo	ack in they will be able to enter orders	and more.			
Reject - the request statu Note: An email will be sen	is will be changed, but it will not be t to the Requestor. Once they log bo	removed. ack in they will see the justification fo	r the rejection			
Site Details						
Status SUBMITTED	Status Date 03/03/2023 16:47					
Assigned Partner ORA Pharmacy	Site	Partner Organization	Partner Group			
Federal PIN	State PIN	National Provider ID (NPI)	Non Public Yes No			
License	License Expiration Date	Special Instructions				
Site Type [3] Community Health Cente	er					
Pharmacy Type						
Number of children 18 years of age a	umber of children 18 years of age and younger Number of adults 19 – 64 years of age					
Number of adults 65 years of age an	d older	Number of unique patients/client	s seen per week on average			
Site Address						

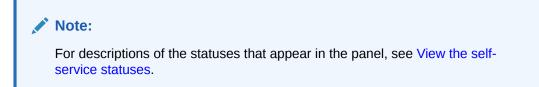
- 4. Review the information in the **Site Details** section.
- 5. Scroll to and review the information in the Site Address section. For example:

Site	e Address
	Physical 123 Main St Email:
	ted by ADMIN on 03/03/2023 16:44 EST ated by Oracle on 10/03/2023 08:36 EDT
Site	e Response Products Types and Programs

6. Scroll to and review the information in the **Site Response Products Types and Programs** section. For example:

Site Respo	nse Products Types and Programs
COVID	COVID19 / Vaccine Test 123
МРХ	Monkeypox / Therapeutic Test to Treat Food Distribution Centers Long Term Care Pharmacy
Status Upd	lates

7. Scroll to and review the information in the **Status Updates**, **Reviews**, and **Verifications** sections. For example:



Created Ì≓	Status	Justification	Created By
03/03/2023 16:47 EST	SUBMITTED	Completed wizard for Self-Service Site	admin
03/03/2023 16:47 EST	SUBMITTED	Completed wizard for Self-Service Site	admin
03/03/2023 16:47 EST	DOCUMENTS PROVIDED CERTIFICATION	User certifies that all documents have been provided	admin
03/03/2023 16:47 EST	REQUESTED	Initial Request for Self Service Site	admin

8. Scroll to and review the information in the **Reviews** section. For example:

Reviews			
Created 1=	Status	Justification	Created By
03/03/2023 16:47 EST	CONTACT POSSIBLE MATCH	Possible OHRR Contact match record found	admin
03/03/2023 16:47 EST	RECEIVING HOURS REVIEWED		admin
03/03/2023 16:47 EST	ADDRESS REVIEWED	Reviewed against OHRR Site Addresses	admin
03/03/2023 16:47 EST	DOCUMENTATION INCOMPLETE	Not all documents approved	admin
03/03/2023 16:47 EST	ADDRESS POSSIBLE MATCH	Possible OHRR Site Address match record found	admin
03/03/2023 16:47 EST	DOCUMENTATION REVIEWED	All documents uploaded and approved	admin
03/03/2023 16:47 EST	CONTACT REVIEWED	Reviewed against OHRR Contacts	admin
Verifications			

9. Scroll to and review the information in the **Verifications** section. For example:

Verifications			
Created 17	Status	Justification	Created By
03/03/2023 16:47 EST	RECEIVING ADDRESS VERIFIED	Reviewed against OHRR Site Addresses	admin
03/03/2023 16:47 EST	PRIMARY CONTACT VERIFIED	Reviewed against OHRR Contacts	admin
Actions			

10. Scroll to the **Actions** section. For example:

Actions					
Justification					
Partner review required, Site review complete					
A Warning					
Note: This justification may be displayed to the Reques	tor!				
				_	
	Cancel	On Hold	Partner Review	Reject	Approve

11. Select **Reject** to reject the request. The request status changes, but the request is not removed from Self-Service Approval Portal. The Process Self-Service Site Request panel closes without requiring a confirmation.



An email is sent to the requestor. When the requestor signs in to Site Portal, they will see the justification for the rejection.

Approve or reject site documents

For each request submitted for approval, you can view the site details, primary contact information, and receiving hours provided in Self-Service Request Portal, and the documents (if any) uploaded by an administrator or partner provides many details about the request and its status.

To approve or reject site documents:

- 1. Open the Navigation pane, and select Requests. The All Requests page opens.
- 2. In the **Requests** page, find the request whose documents you want to view, and select **View** in the **Actions** column. The Review Self-Service Site [Site Name] page opens.
- 3. At the top of the **Review Self-Service Site [Site Name]** page, select the **Documents** tab. For example:

Site Requests ゝ			_	Create Documentation	Send Documentation Notification	Actions • Reviews •
		vice Site -	Health Cli	nic		
Status Updates	Details I	Primary Contact Receiving	g Hours Docume	nts		
Q Search						4
Status 1	Mandatory	Name	Description	Document	t Upload Comments	Actions
REQUESTED	Yes		Testing Common		Testing Common	Review
REQUESTED	Yes	Test Doc				© Review
REQUESTED	Yes	STATE DOCUMENT	add state docu	ment	add state document	© Review

4. Find the document in the list, and select **Review** in the **Actions** column. The Maintain Documents panel opens. For example:



Maintain Documents						
Status REQUESTED						
Name DRIVERS LICENCE						
Mandatory Yes	Auto Add Yes					
Filename						
Document						
Upload Comments optional, auto add						
PII Warning Documentation may contain PII and	d must be handled appropriately!					
Review						
Justification Not all documents approved. All documents uplo and approved, Documents already provided Req						
Warning Note: This justification will be displayed to the Requestor!						
	Cancel Not Applicable Reject					



- 5. In the Maintain Documents panel, review the document details, and in the Review field, enter a justification for the document. You can enter text, or select a quick pick link (for example, Not all documents approved, All documents uploaded and approved, Documents already provided).
- 6. Do any of the following:

The action buttons available in the Maintain Documents panel depend on the status of the document upload you selected.

- For documents with a status of UPLOADED, the Cancel, Approve, and Reject buttons appear.
 - Select **Cancel** to close the panel without any changes.
 - Select Approve if you approve the document. If you approved a previous request and already provided the documents by working directly with an approved partner, you do not need to provide the requested documents a second time.
 - Select **Reject** if you do not approve the document.
- For documents with a status of REQUESTED, the Cancel and Not Applicable buttons appear. Select a button to close the panel.
 - Select **Cancel** to close the panel without any changes.
 - Select Not Applicable.

Perform the reviews required for approval

The approval process requires that you perform a series of reviews on the information submitted by Self-Service Request Portal. The reviews are the same regardless of your role as an administration reviewer or partner reviewer.

You perform reviews on the site addresses, site contacts, and documentation submitted with the request.

Review the site addresses
 You can review the site addresses to check for a match between the site addresses

uploaded by an administrator against the site information in the request. You **should not find** a match with the site addresses.

- Review the site contacts You can review the site contacts to check for a match between the site contacts uploaded by an administrator and the site information in the request. You **should not find** a match with the site contacts.
- Review the completed documentation Approval users can review the common and partner documents that were uploaded by an administrator or partner.

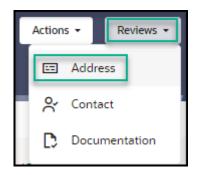


Review the site addresses

You can review the site addresses to check for a match between the site addresses uploaded by an administrator against the site information in the request. You **should not find** a match with the site addresses.

To review the site addresses:

- 1. Open the Navigation pane, and select Requests. The All Requests page opens.
- In the All Requests page, find the request you want to review site addresses for, and select View in the Actions column. The Review Self-Service Site - [Site Name] page opens. Select any tab; the tab selected the last time you navigated away from the page is selected.
- 3. In the **Review Self-Service Site [Site Name]** page, at the top right select **Address** from the **Reviews** drop-down menu. For example:



The Review Address panel opens. For example:



Review Address	5				
Information Review each of the Site Addresses listed below. If none of the Site Addresses are a likely match then click Reviewed . However, if there is a possible match then click Possible Match , and perform appropriate research. If there are no records displayed click Reviewed .					
Site Details					
Status SUBMITTED		Status Date 10/10/2023 10:26			
Assigned Partner Bureau of Testers		_{Site} Test1010	Partner Organization	Parti	ner Group
Federal PIN		State PIN	National Provider ID (N		ts AULT
License		License Expiration Date			
Created by Updated by		10/10/2023 10:26 E 10/10/2023 10:26 E			
Physical [Email:	Not Verified]				
Business Hours					
Monday	24 Hours Off	Monday Opening 1 9:00	Monday Closing 1 17:00	Monday Closing 1	Monday Closing 2
Tuesday	24 Hours Off	Tuesday Opening 1 9:00	Tuesday Closing 1 17:00	Tuesday Opening 2	Tuesday Closing 2

- 4. Review the information in the **Site Details** and **Business Hours** sections. This information was entered by the requestor.
- 5. Scroll to the **Potential Matches with Site Addresses** and **Site Address Reviews** sections. For example:

Q Search								4		
Match Criteria	Partner	Grantee	Site	Federal PIN	Address 1	Address 2	City	County	State	Zip
Phone	Bureau of Testers	BT2	Test							
Phone	BelVita	BV3	Test							
Phone	BelVita	BV3	Test							
Phone	ORA Pharmacy	OR1	Health Clinic							
Phone	ORA Pharmacy	OR1	Pharmacy LTD							
	ess Reviews									Þ

- 6. Compare the information in the **Site Details** section at the top of the panel with the information in the **Potential Matches with Site Addresses** section.
 - Possible address matches appear in the **Potential Matches with Site Addresses** section.
 - Results from previous reviews appear in the Site Address Reviews section.

You **should not find** a match with the site addresses.

7. Scroll to the **Actions** section. For example:

Actions			
Information It is expected that you SHOULD <u>NOT</u> FIND a match with Site Addresses.			
Verified Address			
O Address is NOT verified			
O Address is verified			
Justification			
Possible Site Address match record found , Reviewed against Site Addresses			Required
	Cancel	Possible Match	Reviewed

- 8. In the required Verified Address field, select one of the following options:
 - Address is NOT verified
 - Address is verified
- In the required Justification field, enter a description that describes your review of the entries in the panel. You can enter text, or select a quick pick link (for example, Possible Site Address match record found, Reviewed against Site Addresses).
- **10.** Do one of the following:
 - Select **Possible Match** if one of the site addresses may be a match.
 - Select Reviewed if none of the site addresses are a match or a likely a match, or if there are no records.

Review the site contacts

You can review the site contacts to check for a match between the site contacts uploaded by an administrator and the site information in the request. You **should not find** a match with the site contacts.

To review the site contacts:

- 1. Open the Navigation pane, and select Requests. The All Requests page opens.
- 2. In the All Requests page, find the request you want to review site contacts for, and select View in the Actions column. The Review Self-Service Site [Site Name] page opens.
- 3. In the **Review Self-Service Site [Site Name]** page, at the top right select **Contact** from the **Reviews** drop-down menu. For example:



C	Action	s 🔹 Reviews 👻
	œ	Address
	Å	Contact
	D	Documentation

The Review Contact panel opens. For example:

Review Contact			
However, if there is a	Contacts listed below. Its are a likely match then click Re possible match then click Possib l Is displayed click Reviewed .	viewed. le Match, and perform appropr	iate research.
Site Contacts			
Status SUBMITTED	Status Date 10/10/2023 10:26		
Assigned Partner Bureau of Testers	^{Site} Test 1010		
First Name	Last Name	Job Title	
Email	Mobile		
Phone	Phone Extension	Fax	User Status PENDING
Status Code PENDING			

- 4. Review the information in the **Site Contacts** section. This information was entered by the requestor.
- 5. Scroll to the **Potential Matches with Site Contacts** and **Contact Reviews** sections. For example:



Potential Ma	atches with Si	te Contac	ts						
Match Criteria 1ุ≒	Partner	Grantee	Site	Federal PIN	Email		Phone	Phone Extension	Fax
Phone	ORA Pharmacy	OR1	Health Clinic						
Phone	ORA Pharmacy	OR1	Health Clinic						
									×.
Contact Rev		norformor	4						
No Primary C	ontact reviews	performed	1						
Actions									

- 6. Compare the information in the **Site Contacts** section at the top of the panel with the information in the **Potential Matches with Site Contacts** section.
 - Possible contact matches appear in the **Potential Matches with Site Contacts** section.
 - Results from previous reviews appear in the **Contact Reviews** section.

Note: You **should not find** a match with the site contacts.

7. Scroll to the Actions section. For example:

Actions			
Information It is expected that you SHOULD <u>NOT</u> FIND a match with Site Contacts.			
Contact Verified			
O Primary Contact is NOT Correct			
O Primary Contact is Correct			
Justification			
Possible Contact match record found, Reviewed against Contacts			Required
	Cancel	Possible Match	Reviewed

- 8. In the required **Contact Verified** field, select one of the following options:
 - Primary Contact is NOT Correct



- Primary Contact is Correct
- 9. In the required **Justification** field, enter a description that describes your review of the entries in the panel. You can enter text, or select a quick pick link (for example, Possible Contact match record found, Reviewed against Contacts).
- **10.** Do one of the following:
 - Select **Possible Match** if one of the site contacts may be a match.
 - Select Reviewed if none of the site contacts are a match or a likely match, or if there are no records.

Review the completed documentation

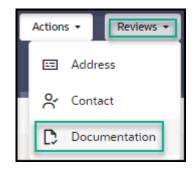
Approval users can review the common and partner documents that were uploaded by an administrator or partner.

However:

- Only approval self-service administrators can modify common documents.
- Only approval self-service administrators and partner self-service administrators can modify partner documents.
- Partner users can view the partner documents that were uploaded by an administrator or by a partner for their partner.

To review the documentation:

- 1. Open the Navigation pane, and select Requests. The All Requests page opens.
- In the All Requests page, find the request you want to review completed documentation for, and select View in the Actions column. The Review Self-Service Site - [Site Name] page opens.
- 3. In the **Review Self-Service Site [Site Name]** page, at the top right select **Documentation** from the **Reviews** drop-down menu. For example:



The Review Documentation panel opens. For example:



Review Do	Review Documentation					
Information	ation					
Review e	ach of the do	ocuments listed	d below.			
However	, if there are appropriate re no record	any missing do actions.		viewed. ents that have not been approved the complete if documentation is requi		
Site Details Status SUBMITTED			s Date 10/2023 10:26	Assigned Partner Bureau of Testers	^{Site} Test1010	
Documents						
Mandatory	Auto Add	Status	Document	Upload Comments		Actions

- 4. Review the information in the **Site Details** section. This information was entered by the requestor.
- 5. Scroll to the **Documents** section. For example:
- 6. To review the details for a document, find it in the list in the **Documents** section, and select **Review** in the **Actions** column. The Maintain Documents panel opens. For example:

The **Review** button only appears for documents that are not reviewed.



Maintain Documents	
Status UPLOADED	
Name REGISTRATION DOCUMENT	
Mandatory Yes	Auto Add Yes
Filename OHRR_upload.txt	
Document	
Upload Comments Register document to upload	
Created by ADMIN on 03/01/2023 09:00 EST Updated by ADMIN on 03/01/2023 09:00 EST	
PII Warning Documentation may contain PII and mu	ist be handled appropriately!
Review	
Justification Not all documents approved, All documents uploaded and approved, Documents already provided Required	
▲ Warning Note: This justification will be displayed	to the Requestor!
	Cancel Reject Approve



- In the Maintain Documents panel, review the information in the Status, Name, Mandatory, Auto Add, Filename, and Document fields, and then do the following:
 - Select **Download** to download and view the document, if needed. The download option appears above the document image for uploaded documents only.
 - In the required Justification field, enter a description of your review of the entries on this page. You can enter text, or select a quick pick link (for example, Not all documents approved, All documents uploaded and approved, Documents already provided). If you approved a previous request and already provided the documents by working directly with an approved partner, you do not need to provide the requested documents a second time. The Maintain Documents panel closes.
 - Select Reject if you do not approve the document. The Maintain Documents panel closes.
 - Select **Approve** if you approve the document. The Maintain Documents panel closes.
- 8. Repeat steps 6 to 7 for each document, as needed.
- 9. In the **Review Documentation** panel, scroll to the **Documentation Reviews** section to view details for completed reviews. For example:

Documentation Reviews				
Created 1	Status	Justification	Created By	
03/08/2023 12:56 EST	DOCUMENTATION REVIEWED	Documents already provided		

10. In the **Review Documentation** panel, scroll to the **Actions** section. For example:

Actions	
Justification Not all documents approved , All documents uploaded and approved, Documents already provided	Required
Cancel Documentation Incomplete	Reviewed

11. In the required **Justification** field, enter a description that describes your review of the entries on this page. You can enter text, or select the quick pick link (for example, Not all documents reviewed, All documents uploaded and approved, Documents already provided).

If you approved a previous request and already provided the documents by working directly with an approved partner, you do not need to provide the requested documents a second time.

- **12.** Do one of the following:
 - Select Documentation Incomplete if there are missing documents, there are documents that are not approved, or documentation is required but no records appear in the page.



• Select **Reviewed** if all of the documents are reviewed, or if documentation is not required.

8 View the self-service statuses

The self-service statuses are reference descriptions for the request, review, document, and verification statuses that are used in Self-Service Approval Portal to track the approval process for each request.

- View descriptions of the request statuses The request statuses indicate the status of a request with a unique name, a description of the status, and whether the status is active.
- View descriptions of the review statuses
 The review statuses indicate the status of a review with a unique name, a description of the status, and whether the status is active.
- View descriptions of the document statuses The document statuses indicate the status of a document with a unique name, a description of the status, and whether the status is active.
- View descriptions of the verify statuses
 The verify statuses indicate the status of a verification with a unique name, a description of the verification, and whether the status is active.

View descriptions of the request statuses

The request statuses indicate the status of a request with a unique name, a description of the status, and whether the status is active.

To view descriptions of the request statuses:

- 1. Open the Navigation pane, and select Statuses. The Statuses page opens.
- 2. At the top of the Statuses page, select the Request Statuses tab. For example:

tatuses			
equest Statuses Review Statuses Docur	econy and the contraction of the	2330	
Name	Description	Display Order	Active
Requested	A Self-Service user has requested a new Site.	10	Yes
Submitted	The Self-Service Site has completed the wizard and entered all the necessary details.	20	Yes
Assigned	The request has been assigned to a partner.	30	Yes
Partner Review	The request can now be reviewed by the assigned partner.	40	Yes
On Hold	The request has been put on hold.	50	Yes
Approved	The request has been approved.	60	Yes
Rejected	The request has been rejected.	70	Yes
Canceled	The request has been Canceled.	70	Yes
Activated	All details have been reviewed and verified. The Site is now active.	80	Yes
Documents Provided Certification	User certifies that all documents have been provided.	90	Yes



View descriptions of the review statuses

The review statuses indicate the status of a review with a unique name, a description of the status, and whether the status is active.

To view descriptions of the review statuses:

- 1. Open the Navigation pane, and select Statuses. The Statuses page opens.
- 2. At the top of the Statuses page, select the Review Statuses tab. For example:

Statuses			
Review Statuses	Document Statuses Verify Statuses	e etako arr	******
Name	Description	Display Order	Active
Reviewed	The Self-Service Site request has been reviewed successfully against similar Site addresses.	230	Yes
Possible Match	The Self-Service Site request has been reviewed successfully against similar Site addresses and found possible match.	240	Yes
Primary Reviewed	The Self-Service Site request has been reviewed successfully against similar Site Primary contacts.	250	Yes
Primary Possible Match	The Self-Service Site request has been reviewed successfully against similar Site Primary contacts and found possible match	260	Yes
Receiving Hours Reviewed	The Self-Service Site receiving hours has been successfully reviewed.	265	Yes
Documentation Reviewed	All mandatory documents have been uploaded and all documents have been reviewed successfully.	270	Yes
Documentation Incomplete	One or more documents are either missing or failed review.	280	Yes

View descriptions of the document statuses

The document statuses indicate the status of a document with a unique name, a description of the status, and whether the status is active.

To view descriptions of the document statuses:

- 1. Open the Navigation pane, and select Statuses. The Statuses page opens.
- 2. At the top of the Statuses page, select the Document Statuses tab. For example:

Statuses			
Request Statuses Review Statu	ses Document Statuses Verify Statuses		
Name	Description	Display Order	Active
Not Applicable	The document is not applicable.	110	Yes
Uploaded	The document has been uploaded by the requester.	130	Yes

View descriptions of the verify statuses

The verify statuses indicate the status of a verification with a unique name, a description of the verification, and whether the status is active.

To view descriptions of the verify statuses:

- 1. Open the Navigation pane, and select Statuses. The Statuses page opens.
- 2. At the top of the Statuses page, select the Verify Statuses tab. For example:



Statuses				
equest Statuses Review Statuses Docu	ment Statuses Verify Statuses			
Name	Description	Display Order	Active	
Receiving Address Verified	The Self-Service Site receiving address has been successfully verified.	10	Yes	
Primary Contact Verified	The Self-Service Site Primary contact has been successfully verified.	20	Yes	
Receiving Hours Verified	The Self-Service Site receiving hours has been successfully verified.	30	Yes	