Oracle® Health Response Readiness

Self-Service Approval Portal User Guide

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

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Contents

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.

1 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.

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.

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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.

<table>
<tr><th>User</th><th>Description</th></tr>
<tr><td>Administrators</td><td>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.</td></tr>
<tr><td>Partners (and Organizations)</td><td>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.</td></tr>
<tr><td>Sites / site users</td><td>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.</td></tr>
<tr><td>Distributors</td><td>Users who manage warehouse inventory and shipping information.

Access orders
Update distribution information

Distributor users can access Distributor Portal.</td></tr>
</table>

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.

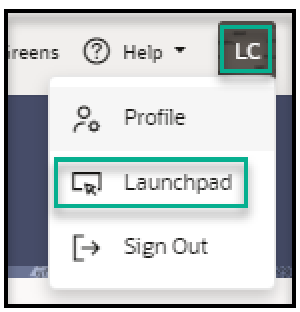
You can access your MFA code for Oracle Health Response Readiness in an email or by scanning a QR code with an authentication app (such as Oracle Mobile Authenticator, Google Authenticator, or Microsoft Authenticator) on your mobile device. You can use either method to receive an MFA code, but you must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

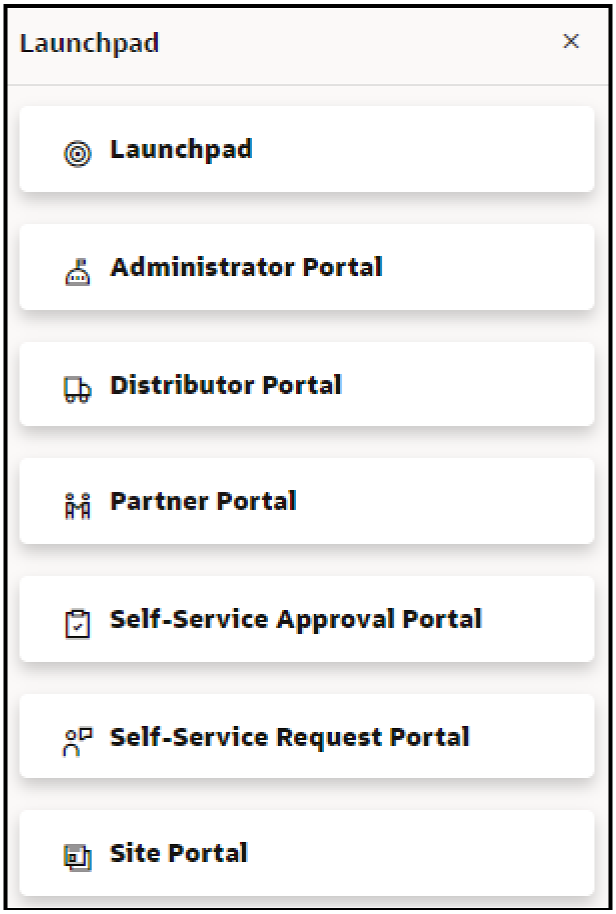
The Launchpad, which opens automatically after you sign in to Oracle Health Response Readiness, provides links to the portals you have rights to access. You can also open the Launchpad from within a portal at any time.

To open the Launchpad from within a portal:

1. 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.

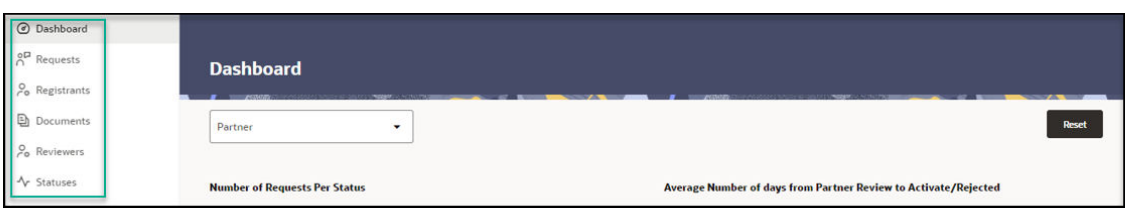
After requests are approved and activated, users can sign in to Site Portal to create response product orders for delivery and manage the inventory.

- 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.



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 as 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 manually. See 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.

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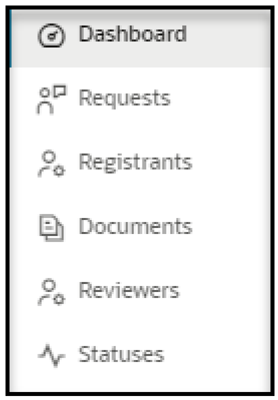
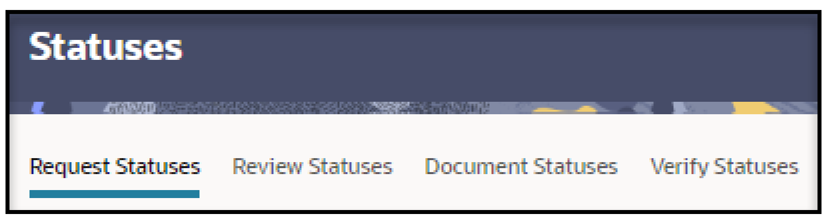
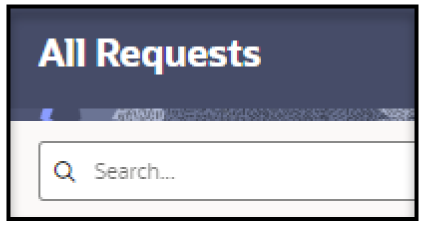
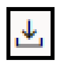
Item	Description	Details
Navigation icon	Appears at the top left of the banner. Opens and closes the navigation pane that appears to the left of the main user interface window. 	The navigation icon is also known as the *hamburger icon*.
Navigation pane	Shows a selectable text list of the portal menus in a panel that appears to the left of the main user interface window. For example: 	To open the navigation pane: 1. Select the **Navigation** icon on the left side of the banner. 2. Select the **Navigation** icon again to close the navigation pane.
Tabs	Represent submenus within a menu. Tabs appear on some list pages below the page title. An underline appears below the active tab. For example: 	Select the name to open the submenu.

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:  *The CSV data files are for review only. Do not use these files to upload data into Oracle Health Response Readiness as they are not in the required format.*	To download the data: 1. Select the **Download** icon to the right of the **Search** field. 2. In the **Downloading** panel, select **OK**.
Search page column selector	On many pages with the search feature, a Column selector icon appears to the right of the Download icon so that you can customize the page columns. For example:  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.	To customize the page columns: 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 page. 3. Select **Save**.

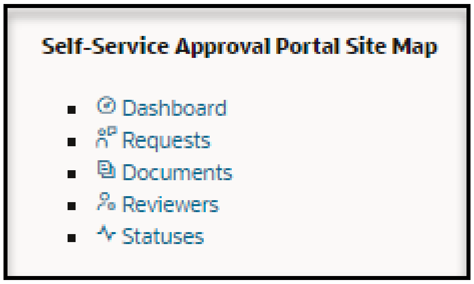
Site map

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:

The Site Map page opens. For example:



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.
2. 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  on 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.
8. Locate the message from Oracle in your email and open it. It contains your six-digit MFA code.

Note:

The MFA code expires in 10 minutes.

9. 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**.
8. 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.

9. 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.
11. 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.

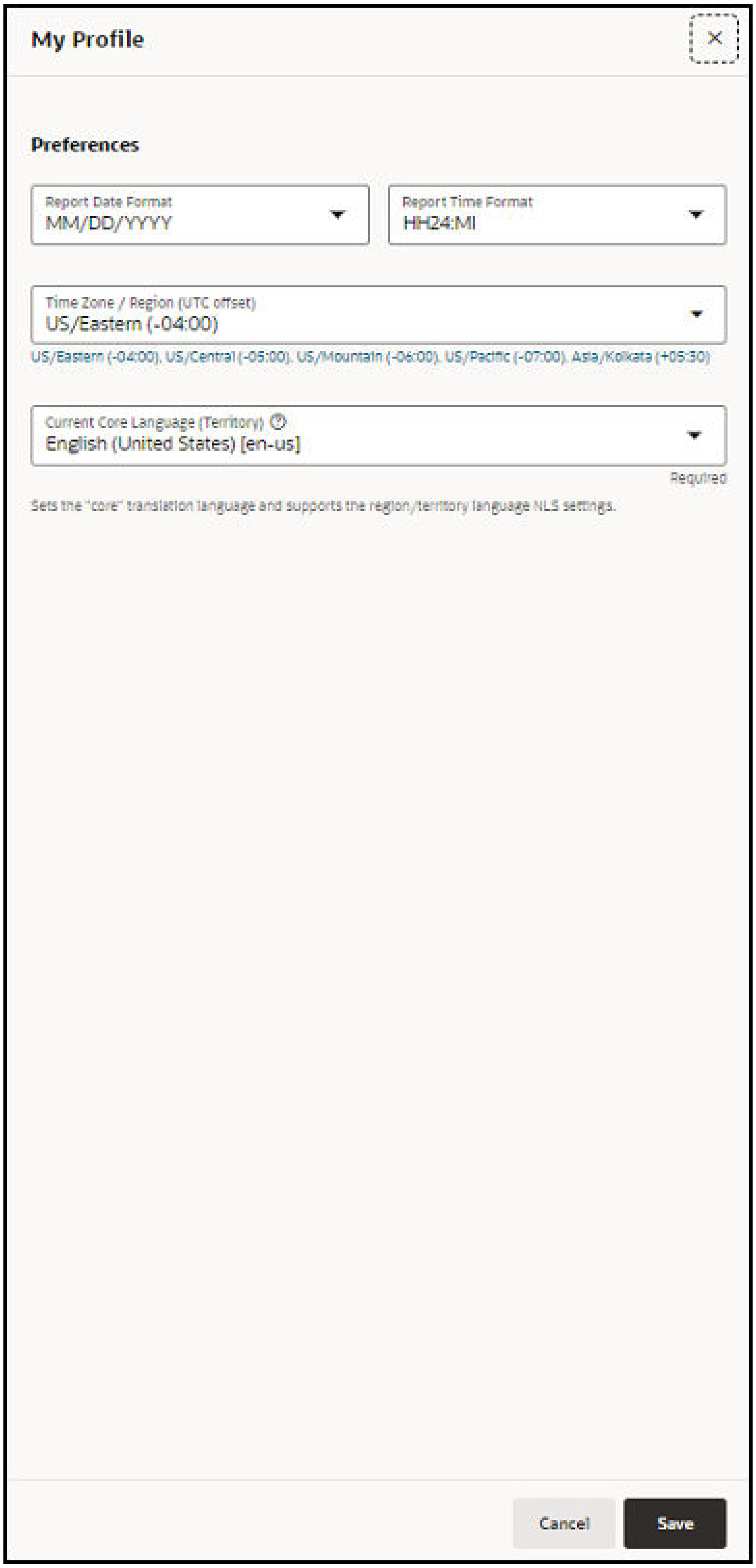
   Optionally, do either of the following:
   - Select **Profile** to open the **My Profile** panel to view and update your account preferences, as described in Manage your profile.
   - Select **Sign Out** to Sign out of Oracle Health Response Readiness.

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:



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.

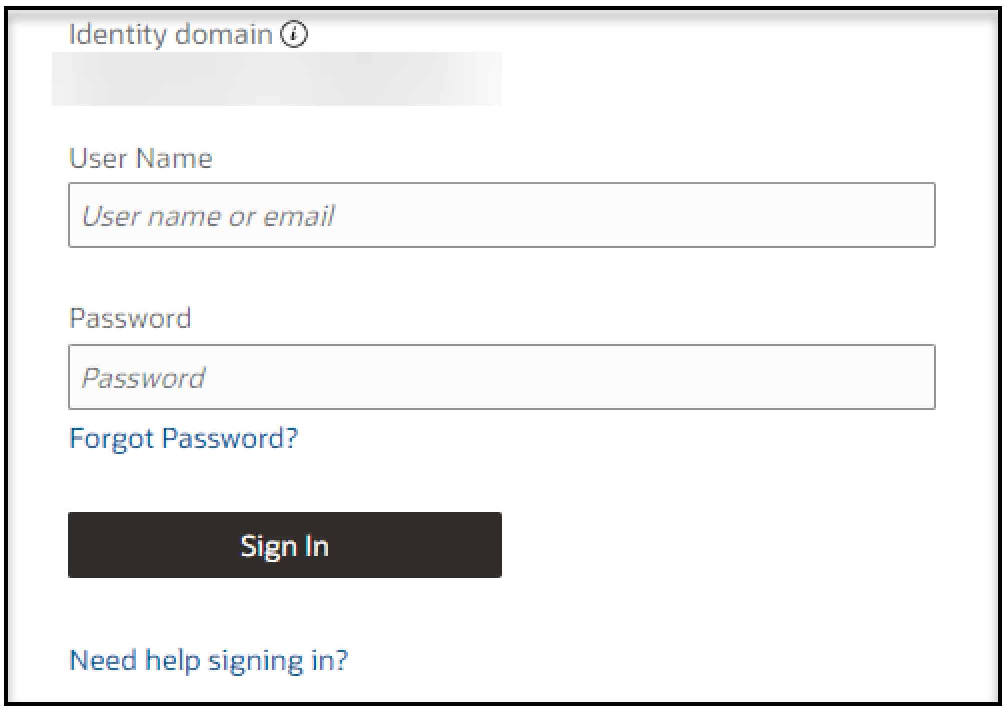
3. Select **Save**.

Reset your password

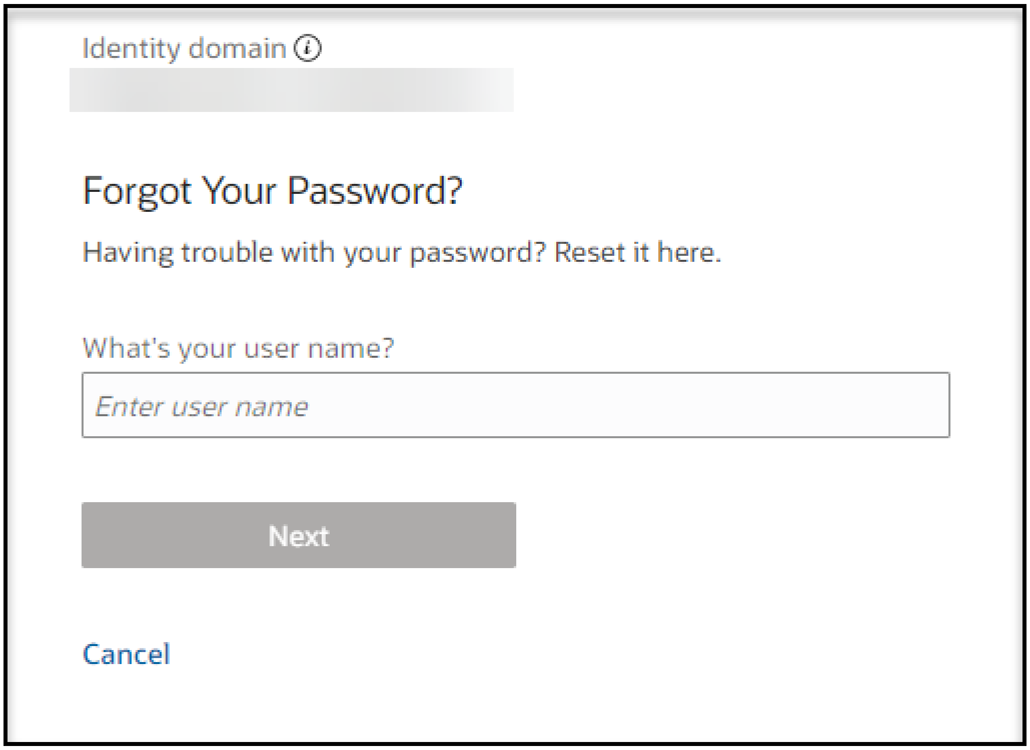
You can reset your password if necessary (for example, if you forgot your password or if you were locked out of your account after five attempts to enter your password when signing in to Oracle Health Response Readiness). You can also ask an administrator to reset your password.

To reset your password:

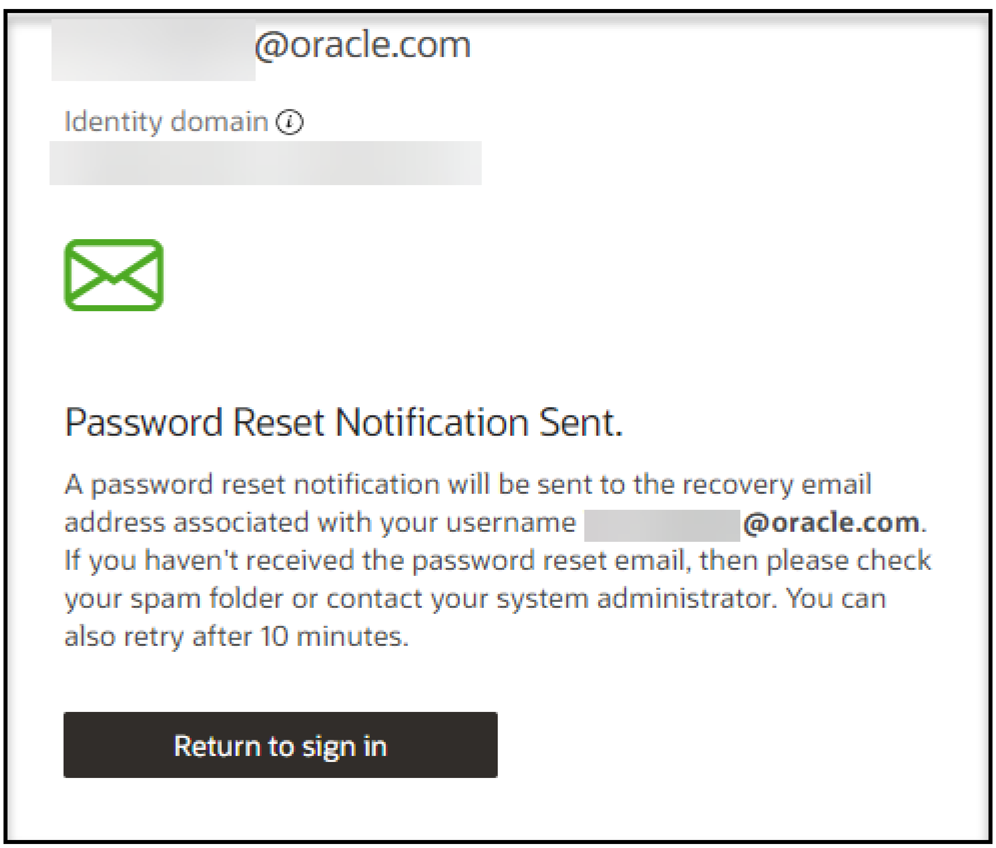
1. Open Oracle Health Response Readiness in a browser to access the **Sign In** page. For example:



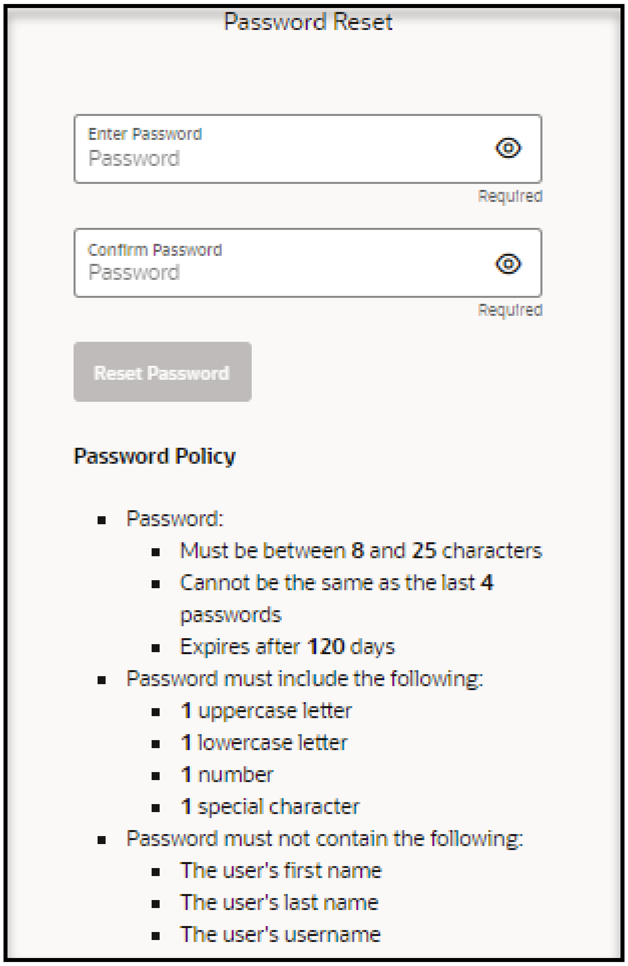
2. In the **Sign In** page, select **Forgot Password?**. The Forgot Your Password page opens. For example:



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:



4. In the **Password Reset Notification Sent** page, select **Return to sign in**.
5. 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:



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.
8. 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.

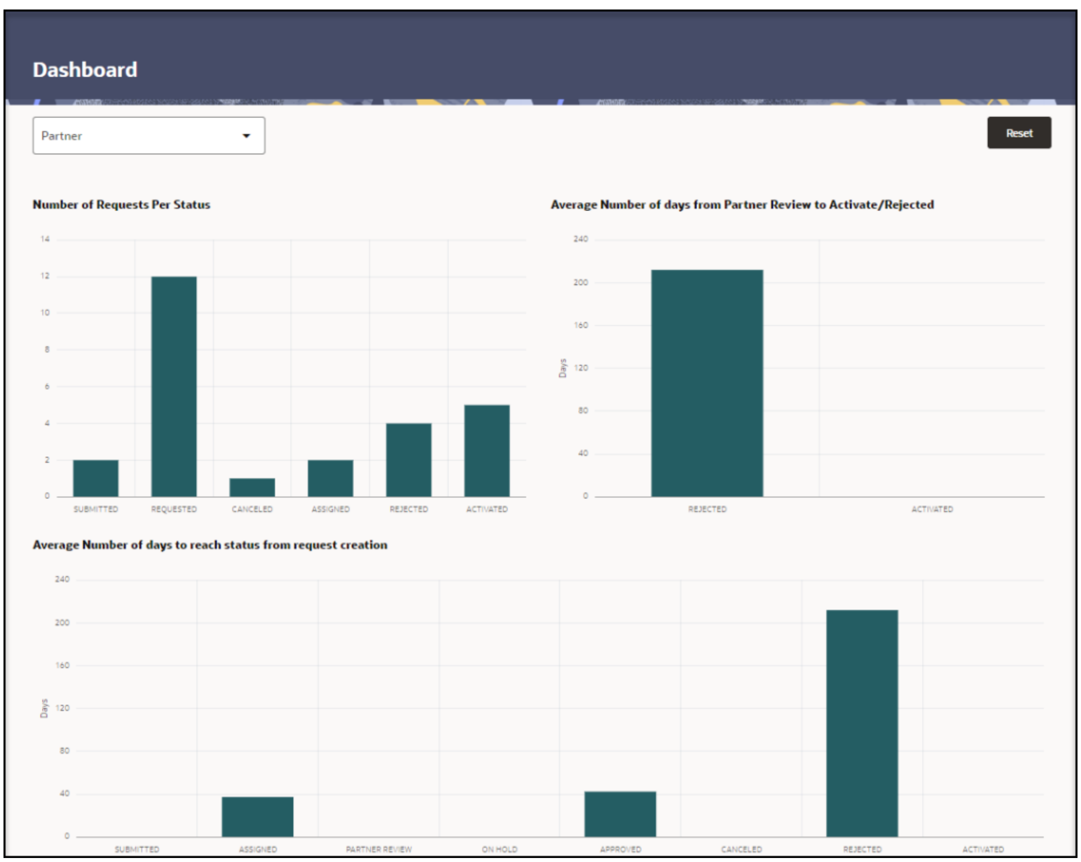
View the dashboard statistics on the requests

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.

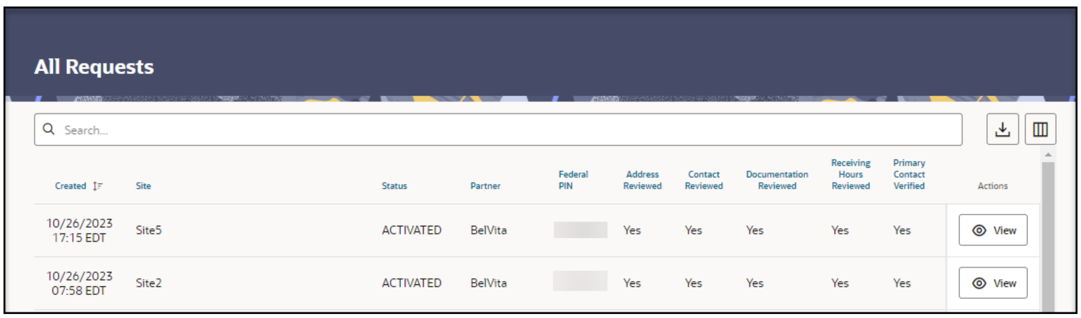
- [View the receiving hours for a site](#)
  An approval user or partner user can review the receiving hours specified for a site.
- [View the documents for a site](#)
  An approval user or partner user can view the documents (if any) uploaded by an administrator or partner for a site.

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:



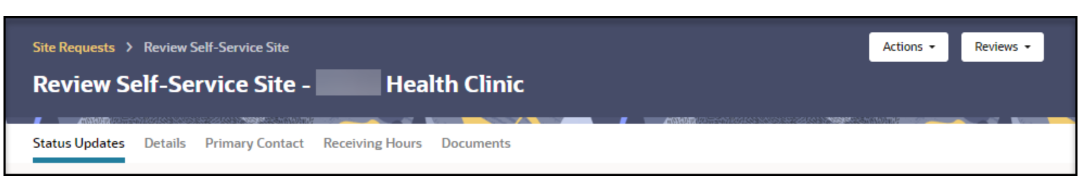
2. In the **All Requests** page, you can do the following:
   - To search for a specific request, enter text or numbers in the **Search** field, or select in the field, choose one or more criteria from the drop-down options, and provide any required details. The search results appear as soon as you enter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



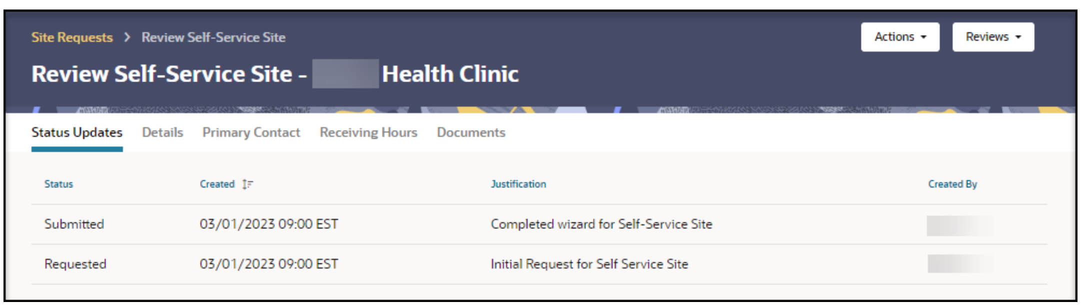
3. In the **Review Self-Service Site - [Site Name]** page, select the following tabs:
   - **Status Updates**—Shows the requests associated with the site and the status for each. See View the status updates for a site request.
   - **Details**—Shows the site details; you can modify the details as needed. 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.
2. 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.
3. At the top of the **Review Self-Service Site - [Site Name]** page, select the **Status Updates** tab. For example:



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

View and modify the site details for a request

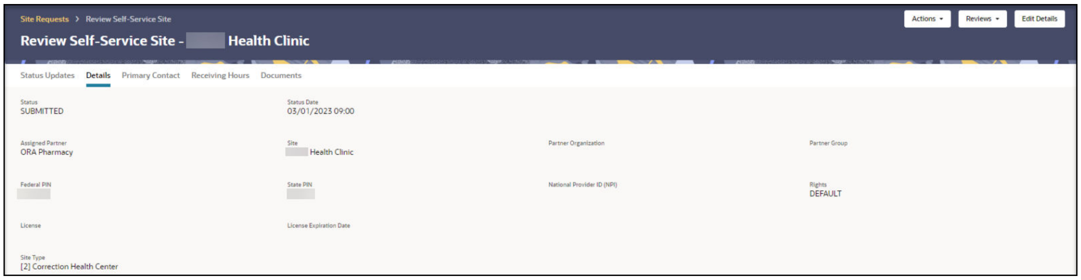
An approval user or partner user can review and, if necessary and your role allows it, modify the self-service site details, primary contact information, and receiving hours entered for a request to correct any minor mistakes, such as typos, an incorrect address or telephone number.

To view and modify the site details:

1. Open the **Navigation** pane, and select **Requests**. The All Requests page opens.
2. 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.

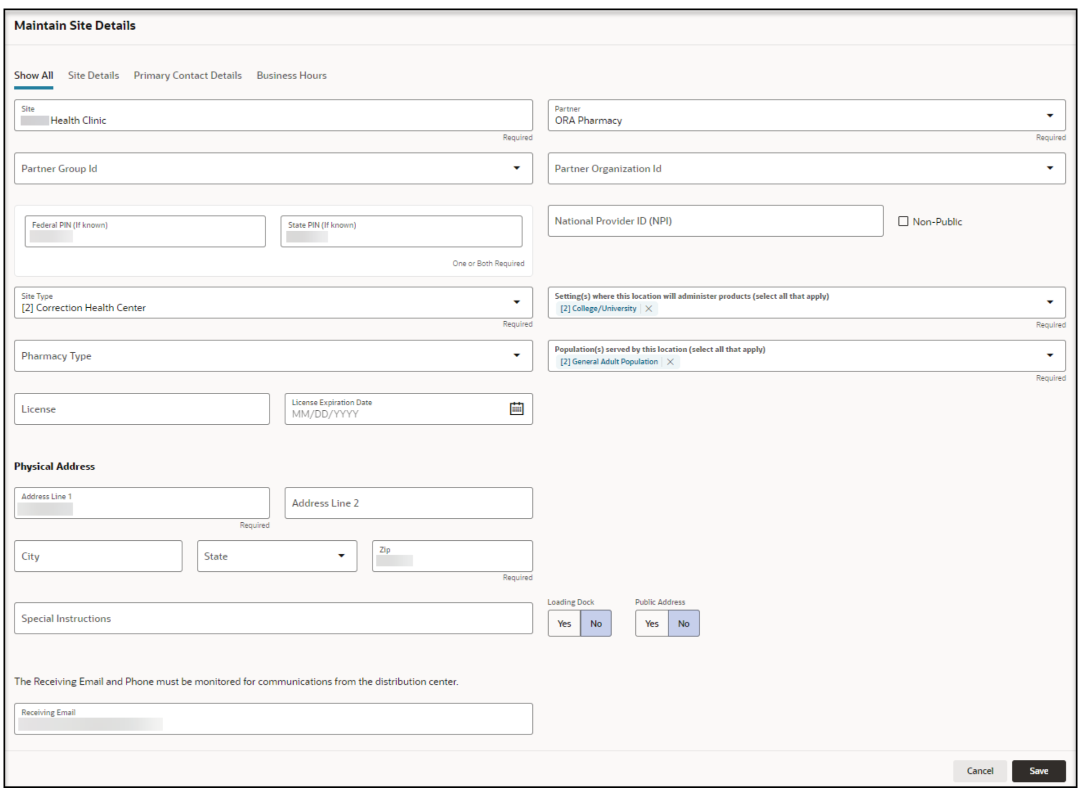
3. At the top of the **Review Self-Service Site - [Site Name]** page, select the **Details** tab. For example:

   Scroll down to view all the information on the page.



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.



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**

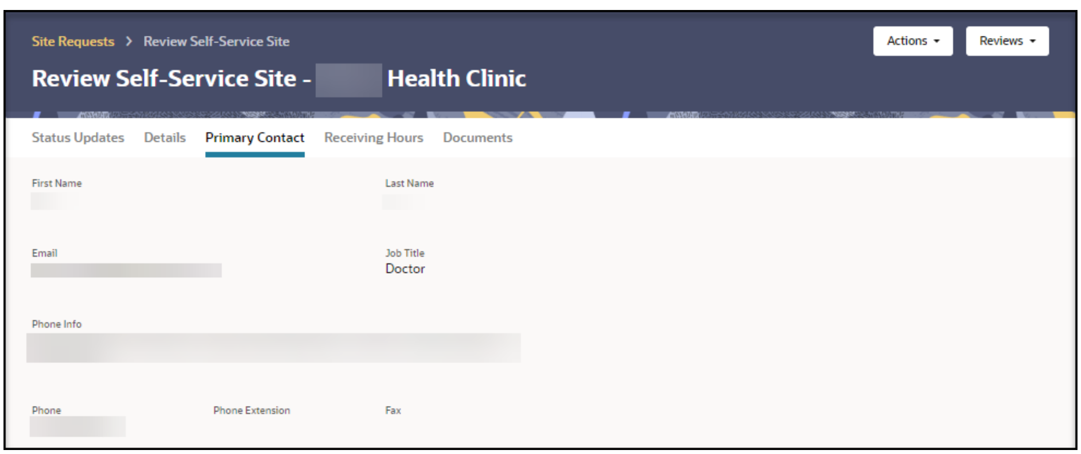
9. In the **Business Hours** section, update the days and hours the address can receive deliveries, as needed:
   - For each day and in the **Holiday** row, if the location is open 24 hours, in the **24 Hours** field, select the toggle button until the white button appears on the right. When you select 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.
2. 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:



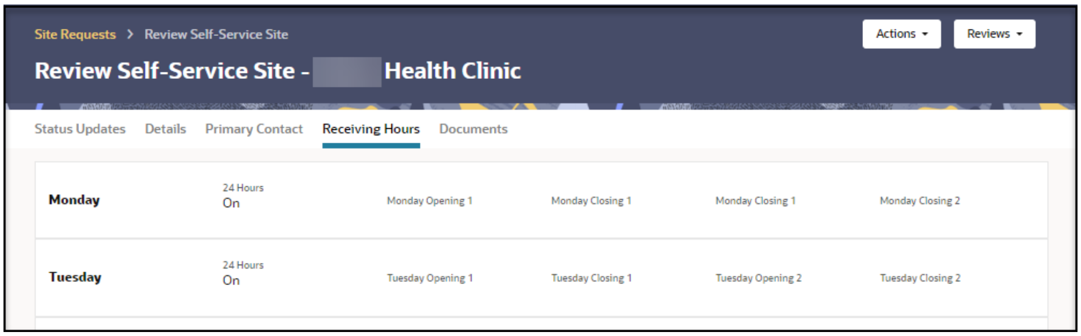
4. If you need to modify the primary contact, see View and modify the site details for a request.

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.
2. 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:



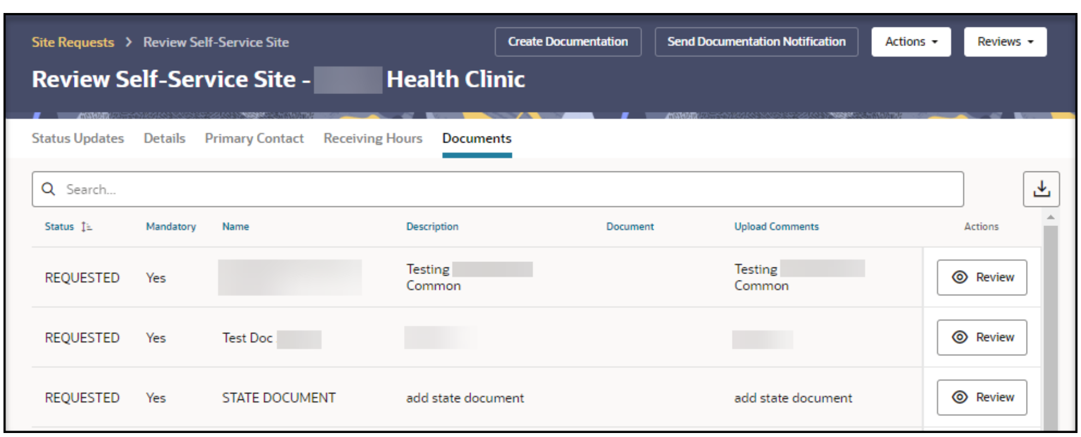
4. If you need to modify any receiving hours, see View and modify the site details for a request.

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.
2. 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:



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.

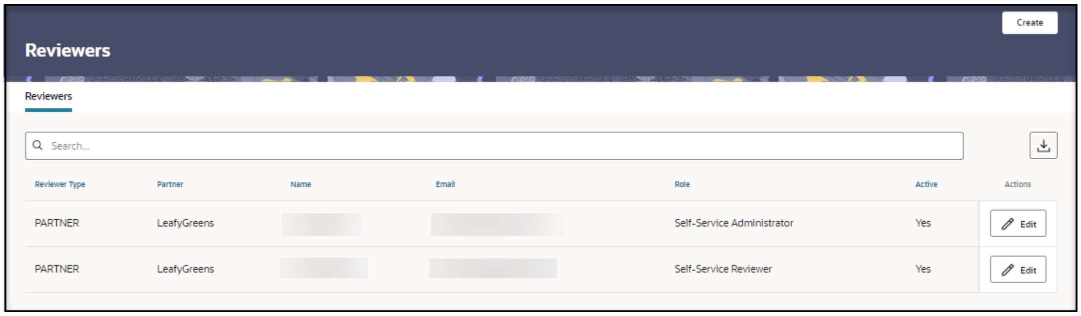
View the list of reviewers

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:



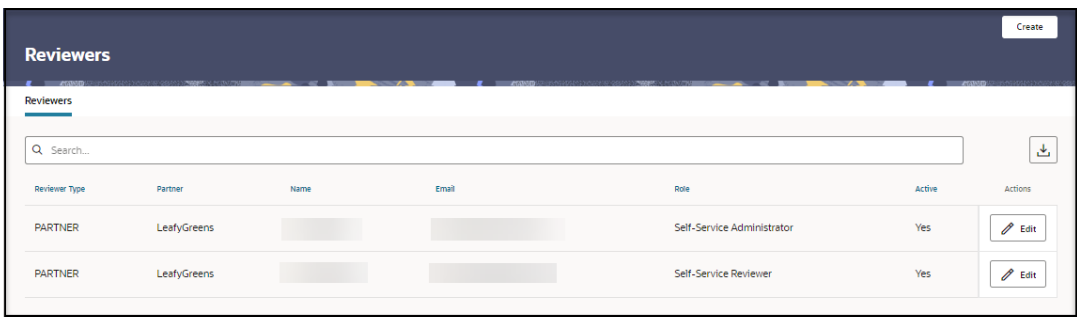
2. To search for a specific reviewer, enter text or numbers in the **Search** field, or select in the field, choose one or more criteria from the drop-down options, and provide any required details. The search results appear as soon as you enter the criteria.

Add a reviewer

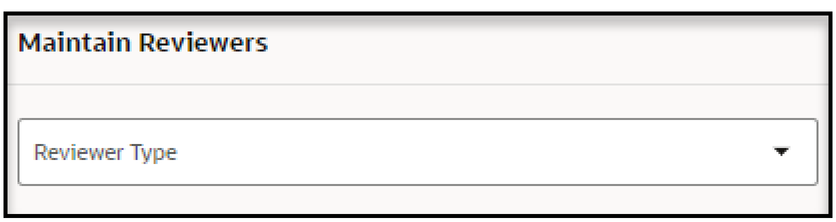
As an approval self-service administrator, you can add an administration reviewer to be available to review any request, and you can add a partner reviewer to be available to review any request within a partner.

To add a reviewer:

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



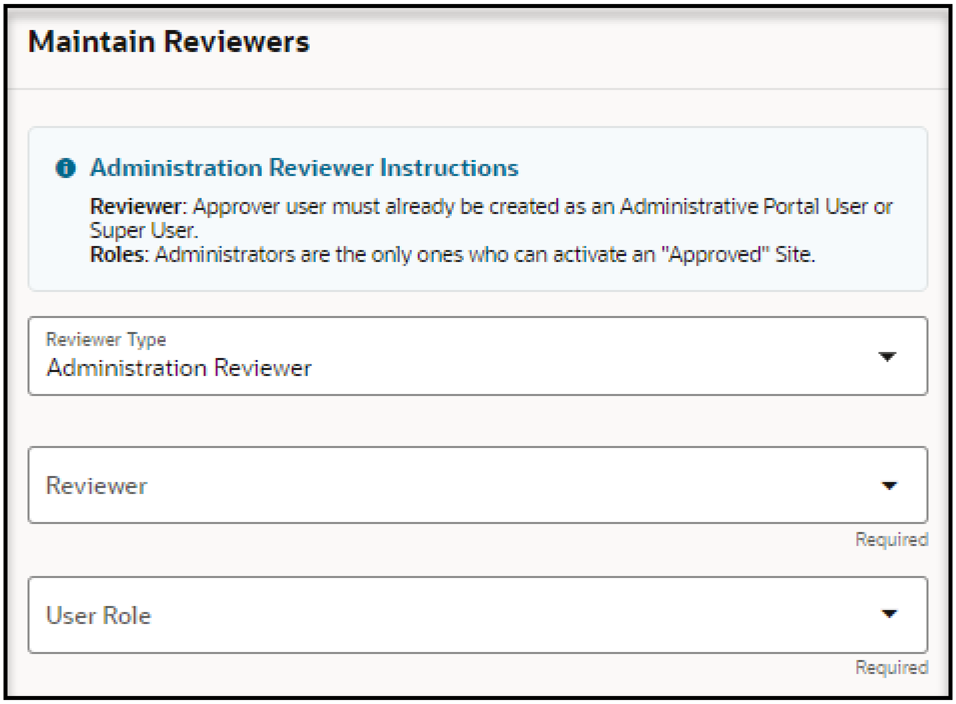
2. In the **Reviewers** page, at the top right, select **Create**. The Maintain Reviewers panel opens. For example:



- 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.

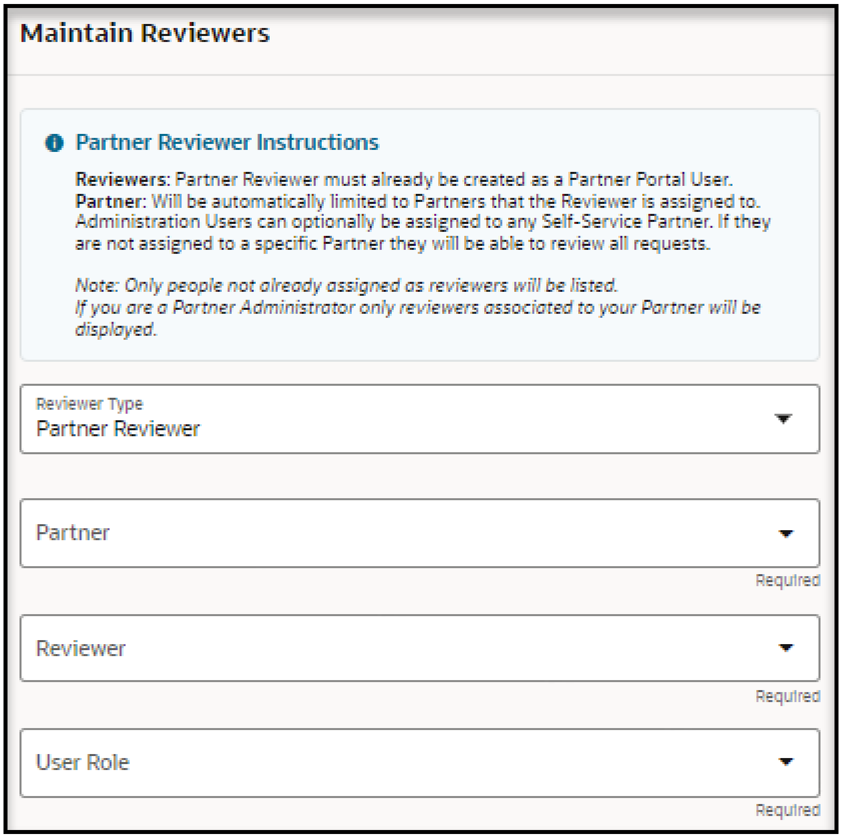
3. In the **Maintain Reviewers** panel, in the **Reviewer Type** drop-down menu, select **Administration Reviewer**. The Maintain Reviewers panel refreshes. For example:



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:



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.

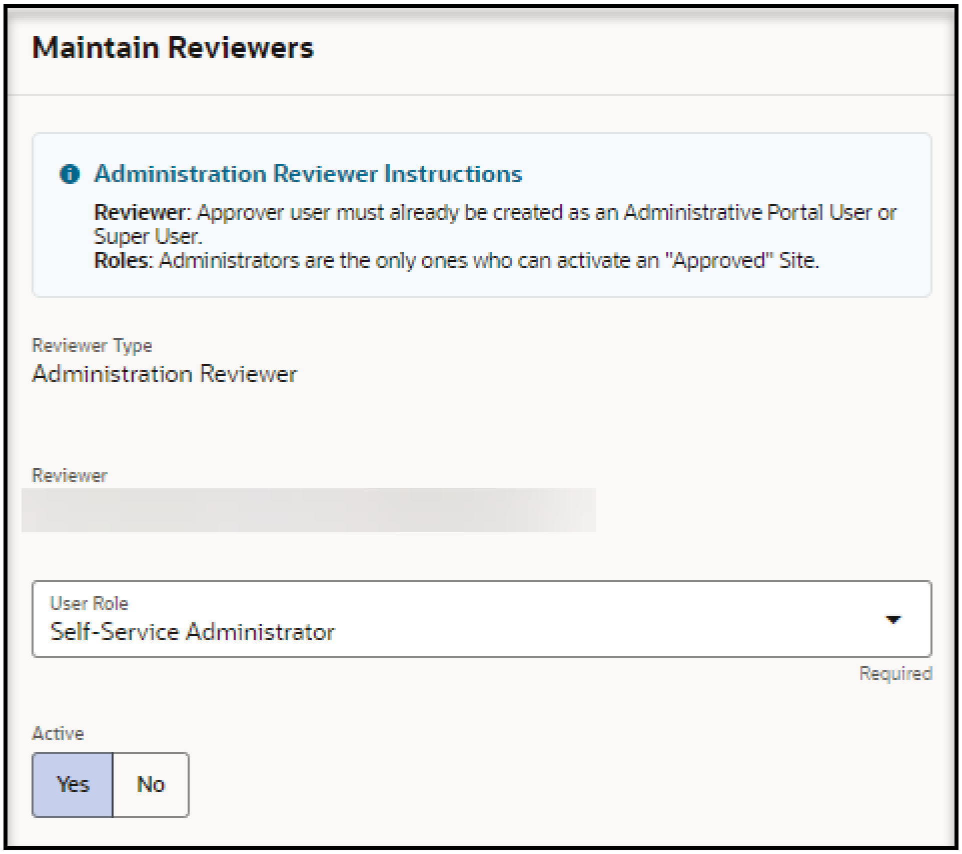
5. Select **Create**.

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:



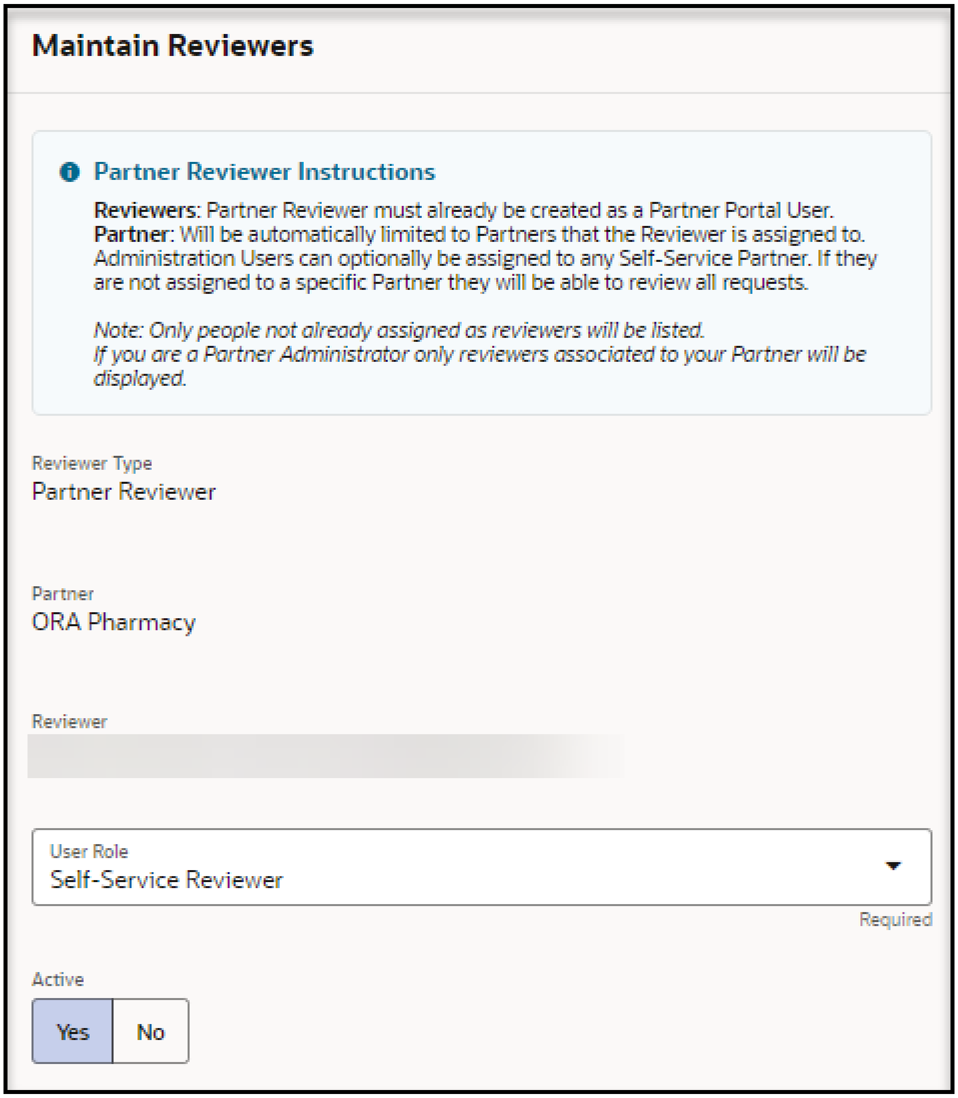
3. In the **Maintain Reviewers** panel, update the following information as needed:
   - **Reviewer Type**—Read-only. Shows **Administration Reviewer**.
   - **Reviewer**—Read-only. Shows the user name and email of the reviewer.
   - **User Role**—Required. Select **Self-Service Administrator** or **Self-Service 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:



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**.

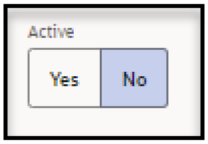
Inactivate a reviewer

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.

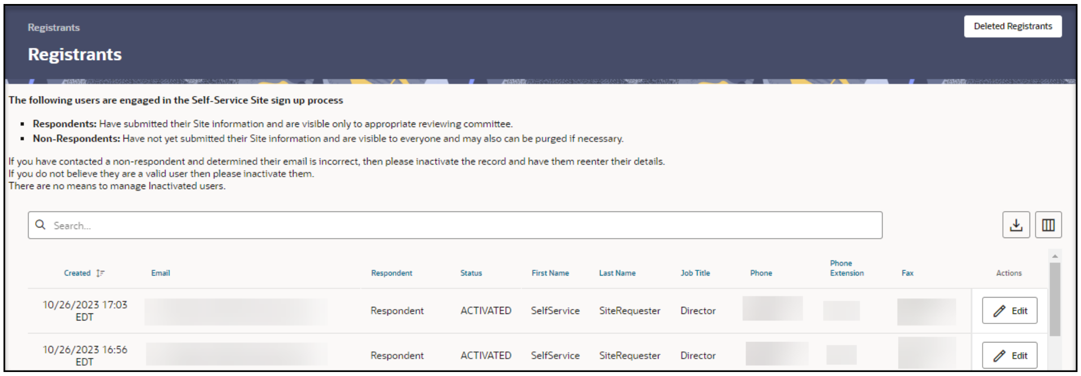
- View the list of registrants
  As an approval user (self-service administrator or self-service reviewer), you can assess the registrants submitted by Self-Service Request Portal to identify users who have submitted their site information, who need to have their self-service site email re-sent, or who 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 non-respondent 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

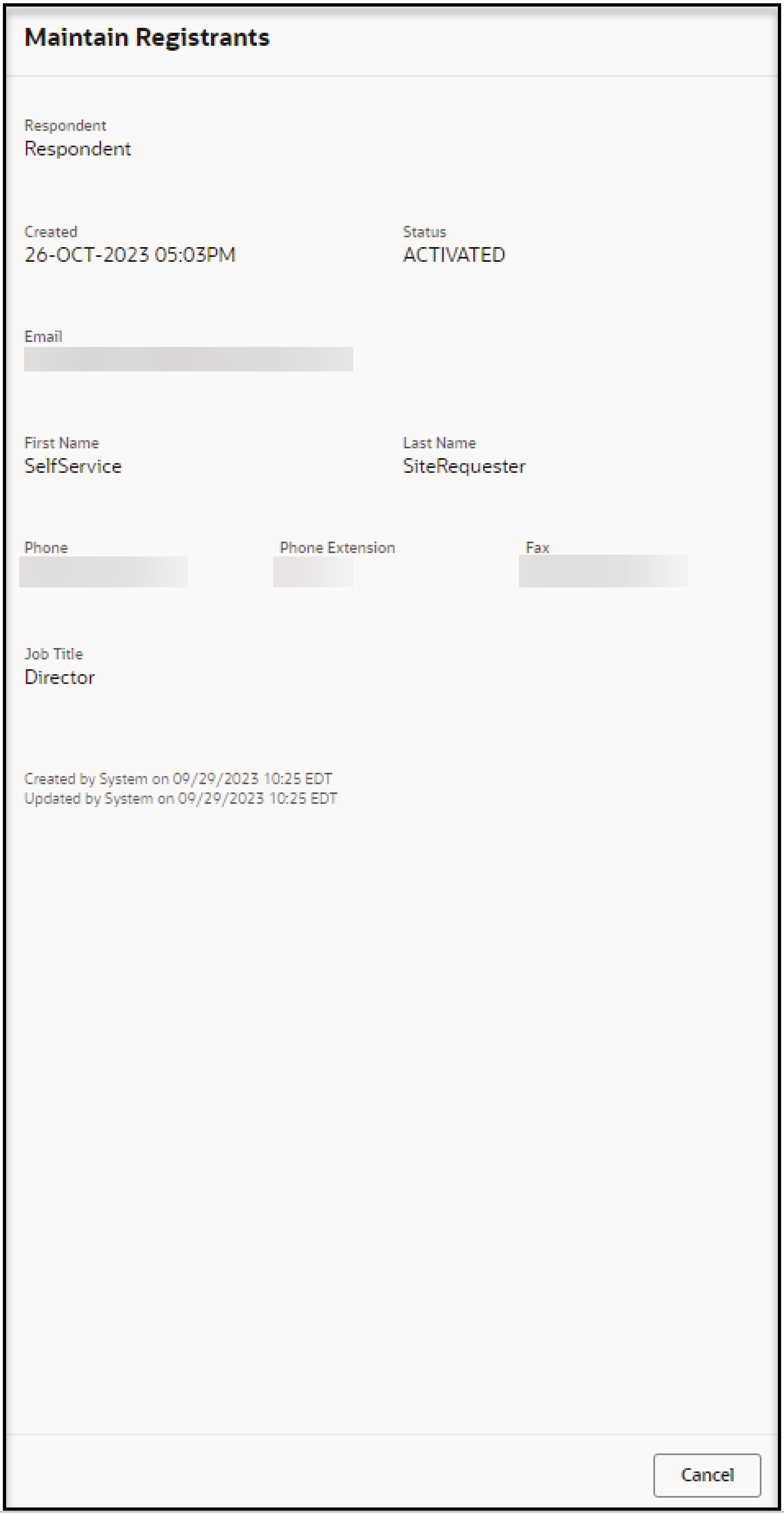
As an approval user (self-service administrator or self-service reviewer), you can assess the registrants submitted by Self-Service Request Portal to identify users who have submitted their site information, who need to have their self-service site email re-sent, or who may be duplicates or are otherwise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



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 non-respondent 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
Respondent
Respondent
Created
26-OCT-2023 05:03PM
Status
ACTIVATED
Email
First Name
SelfService
Last Name
SiteRequester
Phone
Phone Extension
Fax
Job Title
Director
Created by System on 09/29/2023 10:25 EDT
Updated by System on 09/29/2023 10:25 EDT
Cancel

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 non-respondent registrant.

To view the details for a registrant:

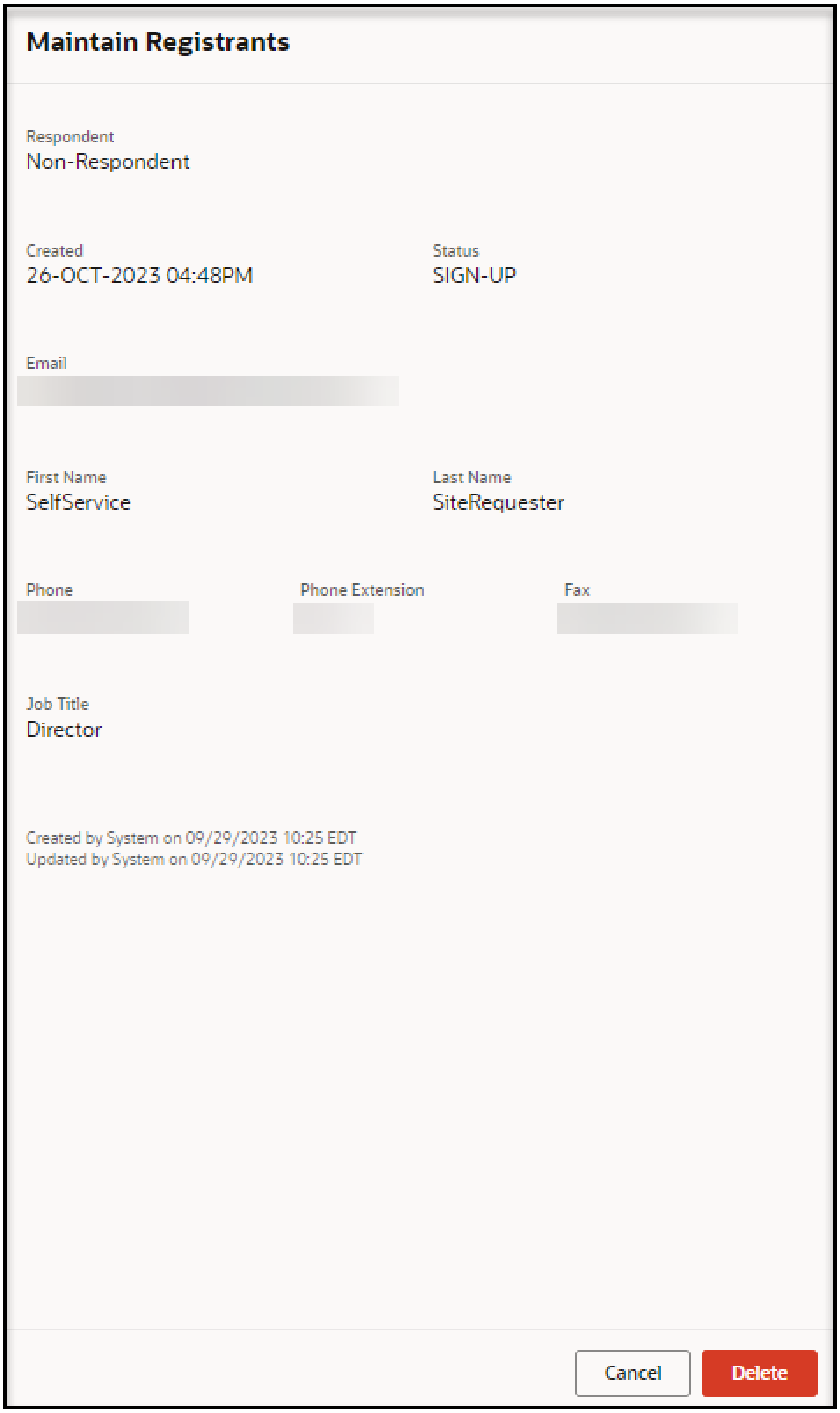
1. Open the **Navigation** pane, and select **Registrants**. The Registrants page opens.
2. In the **Registrants** page, find the registrant (respondent or non-respondent) you want to modify, and select **Edit** in the **Actions** column. The Maintain Registrants panel opens.
3. In the **Maintain Registrants** 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.
2. 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:



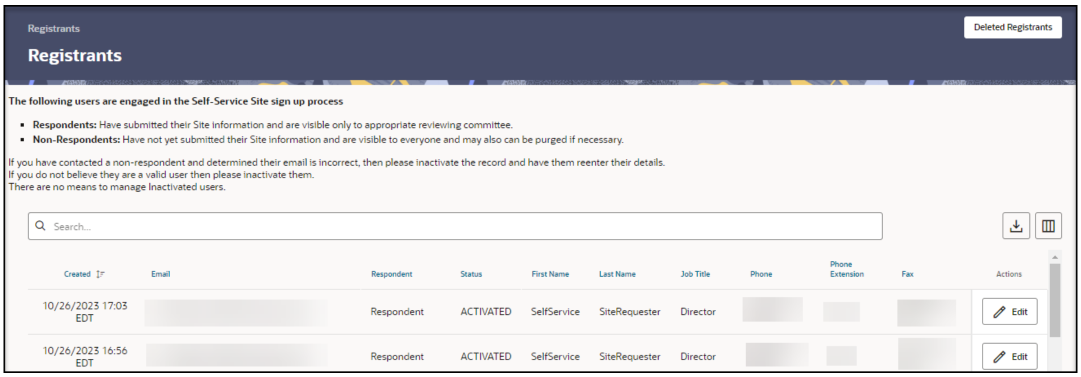
3. Select **Delete**.
4. In the confirmation dialog box, select **Delete**.

View the list of deleted registrants

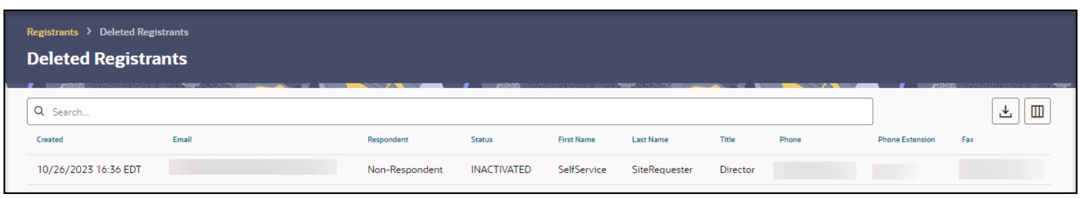
As an approval user, you can view a list of deleted registrants, which is maintained for auditing purposes.

To view the list of deleted registrants:

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



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



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.

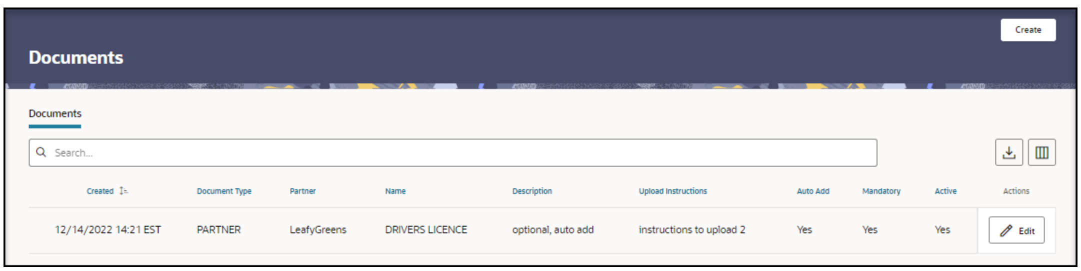
View the documents

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:



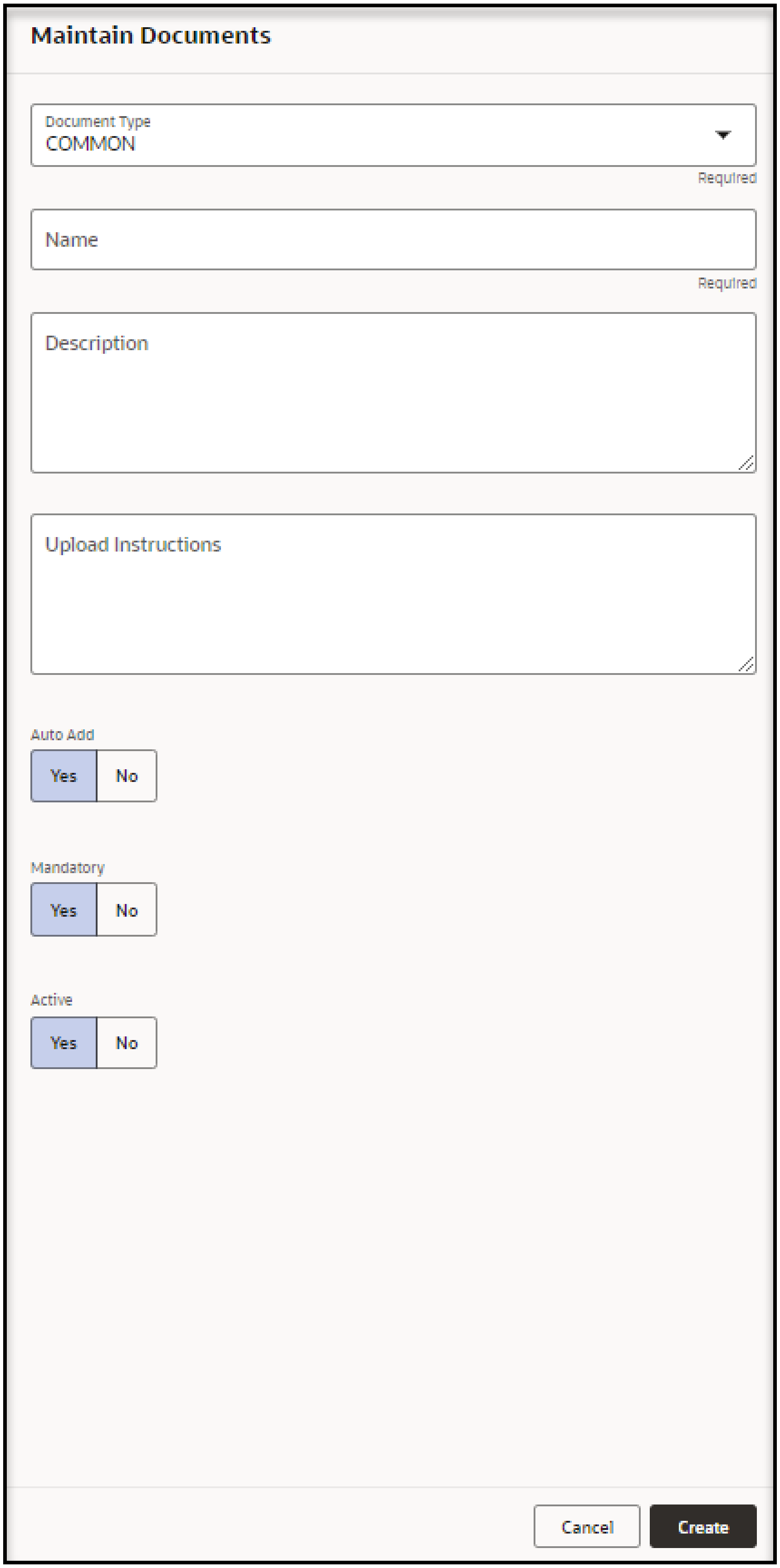
2. To search for a specific document, enter text or numbers in the **Search** field, or select in the field, choose one or more criteria from the drop-down options, and provide any required details. The search results appear as soon as you enter the criteria.

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
Cancel
Create

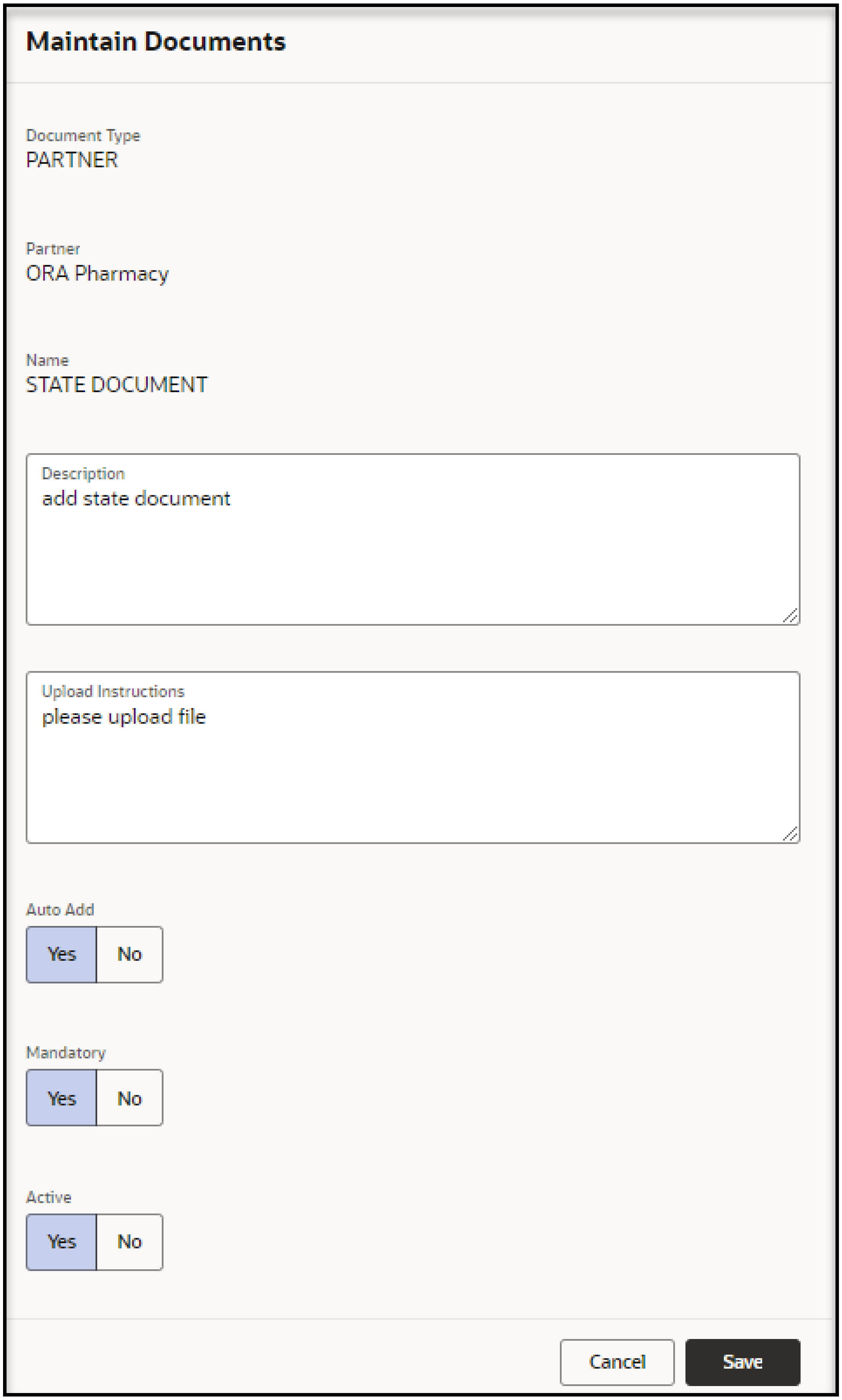
3. In the **Maintain Documents** panel, provide the following information:
   - **Document Type**—Required. Select **COMMON** or **PARTNER**.
   - **Partner**—Required. Appears only if you select **PARTNER** in the **Document Type** drop-down menu.
   - **Name**—Required.
   - **Description**
   - **Upload 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:



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**.

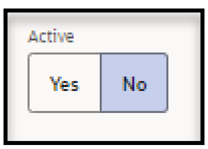
4. Select **Save**.

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.

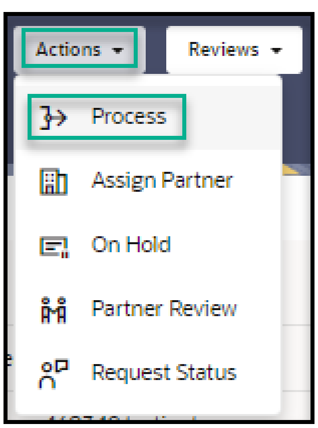
- Step 2: Review Site Matches
  As an approval user, you can use the wizard to check for a match between the site addresses uploaded by an administrator against the site information in the request. You **should not find** a match with the site addresses.
- Step 3: Review Contact Matches
  As an approval 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

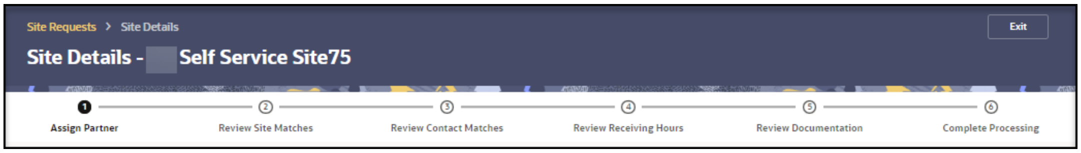
You can use the wizard to review and approve a request as quickly as possible. The wizard is only available for approval users.

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:



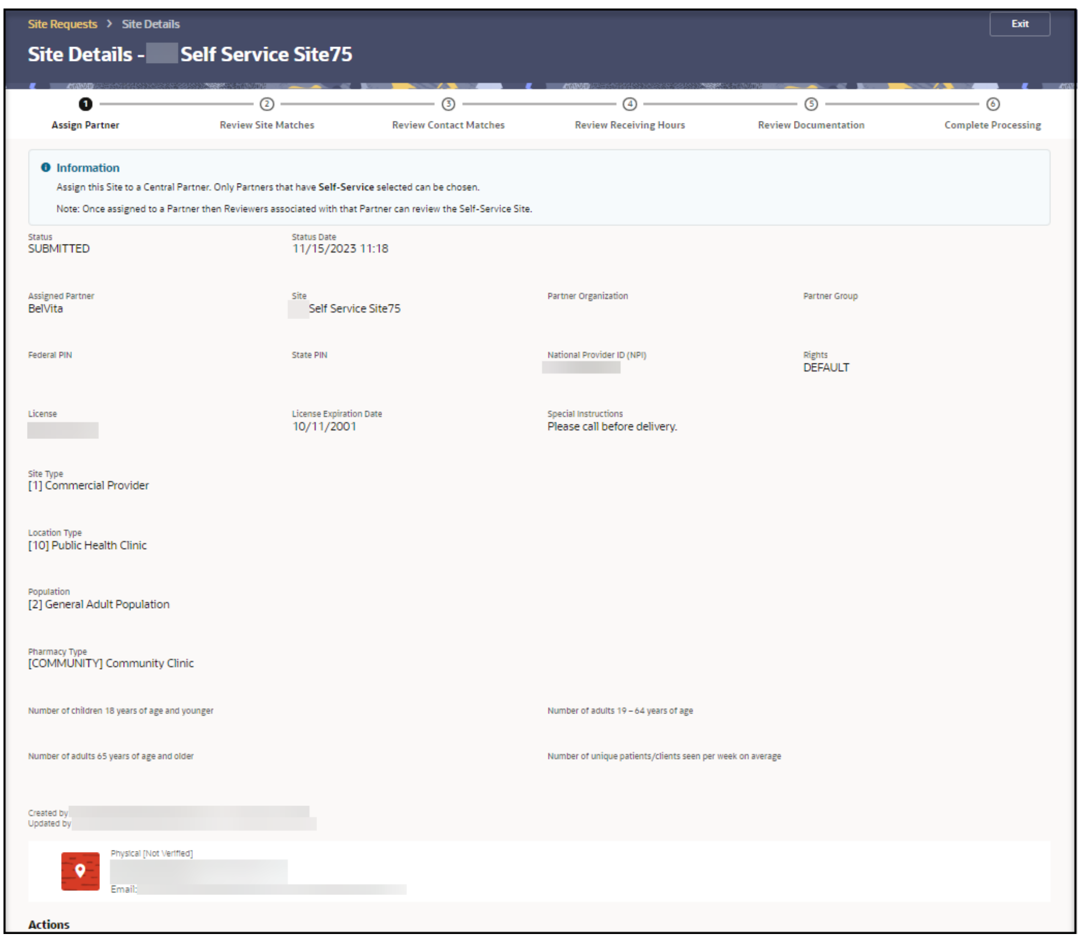
4. Do one of the following:
   - To continue in the wizard, see Step 1: Assign Partner.
   - To leave the wizard, select **Exit**. You can complete the request approval and review steps by re-entering the wizard at a later time, or manually as described in Perform the actions required for approval and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

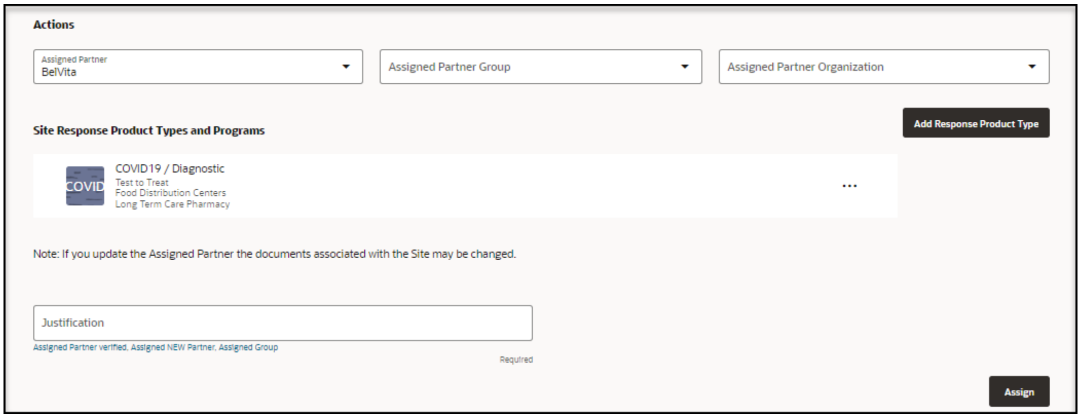
To assign a site to a partner:

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

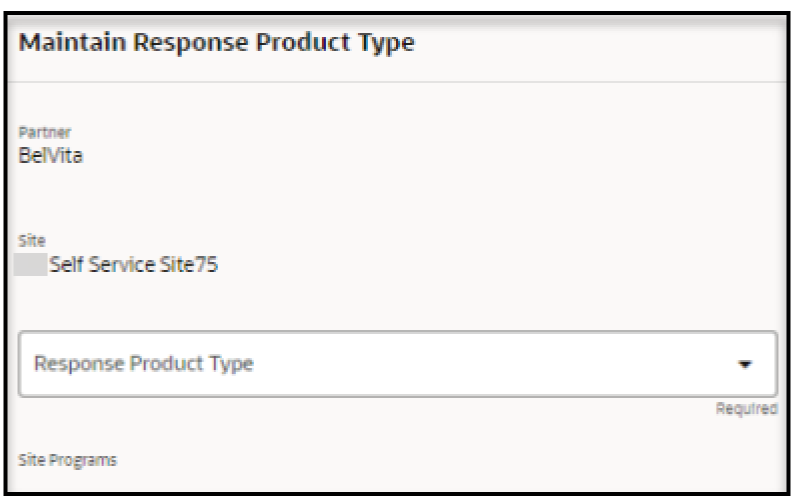


> **Note:**
>
> If you need to edit any of the site information, select **Exit** to leave the wizard and follow the instructions in View and modify the site details for a request.

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



3. Provide the following information:
   - **Assigned Partner**—Required. Select or change the partner to assign to this self-service 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:



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.

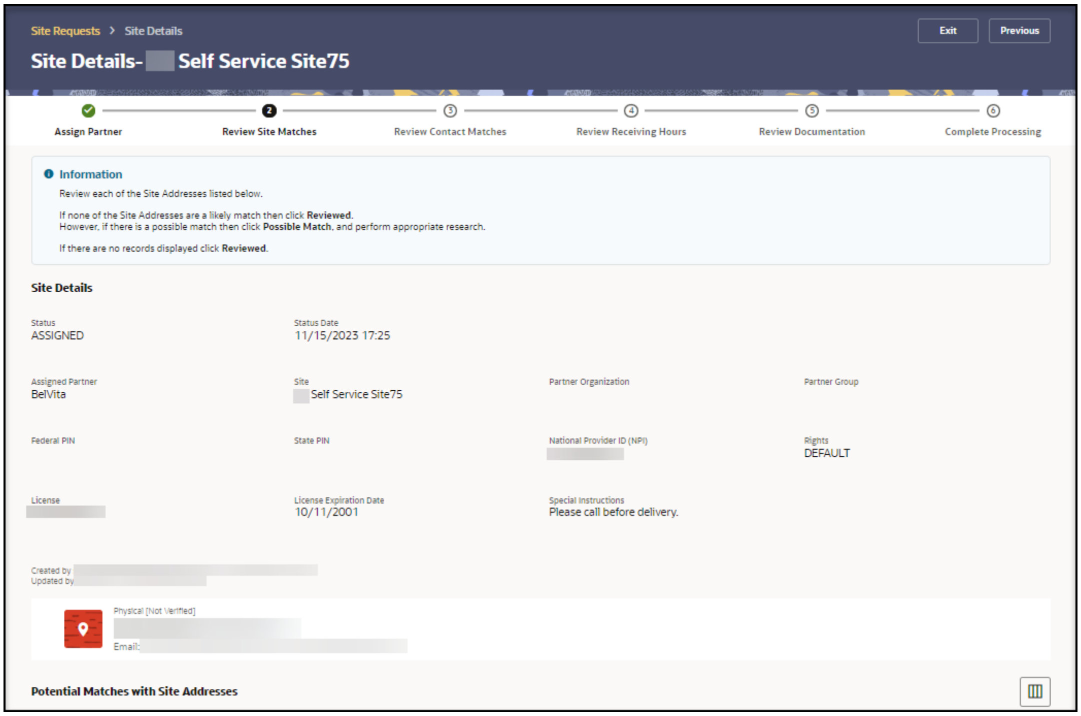
> **Note:**
>
> To continue in the wizard, see Step 2: Review Site Matches. To leave the wizard select **Exit**.

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.

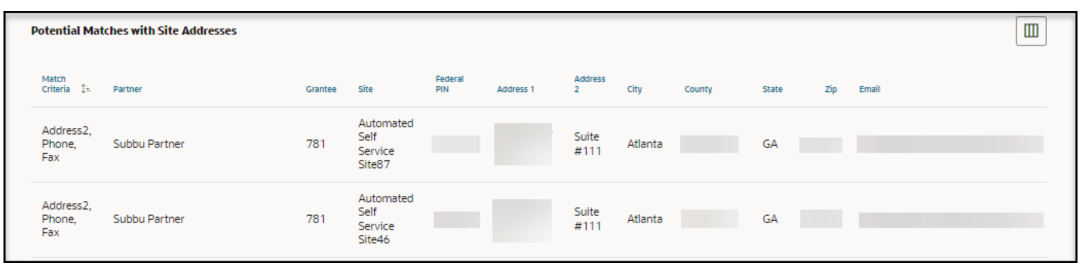
To review the site addresses:

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



> **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.

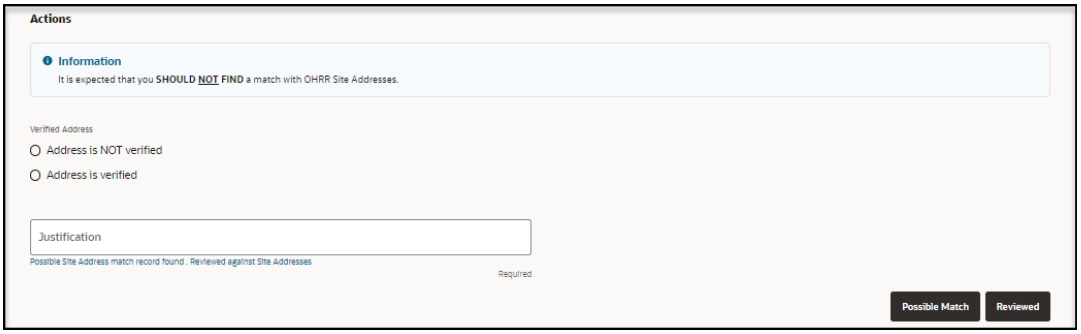
2. Scroll to the **Potential Matches with Site Addresses** section. For example:



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.

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

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



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.

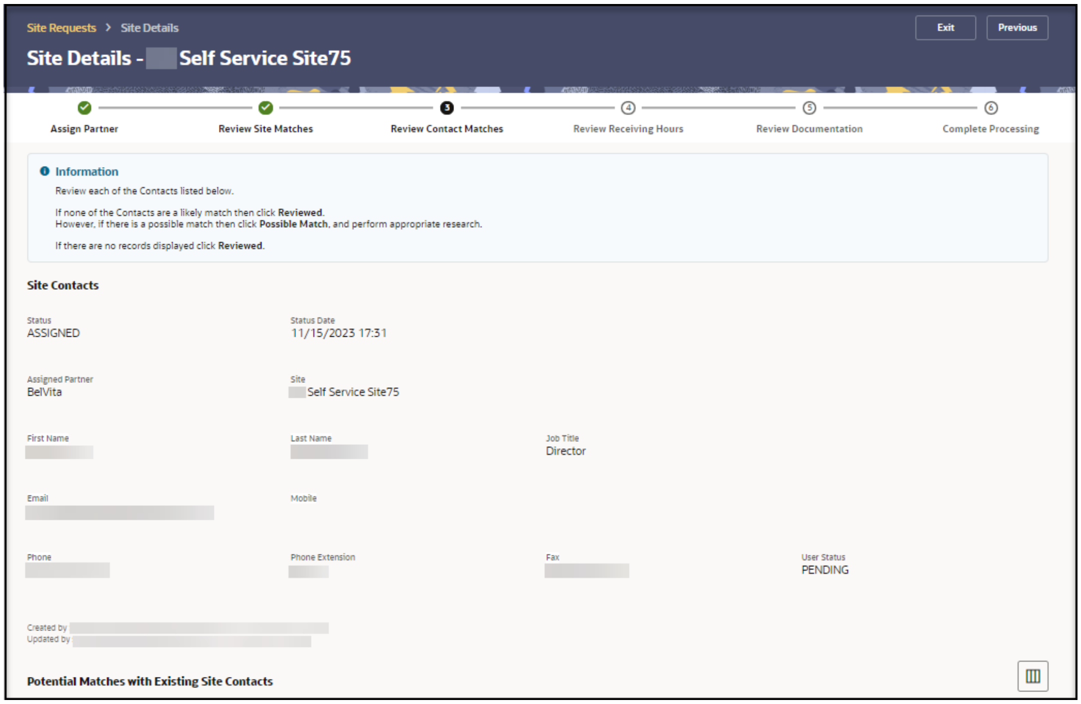
> **Note:**
>
> To continue in the wizard, see Step 3: Review Contact Matches. To leave the wizard select **Exit**.

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.

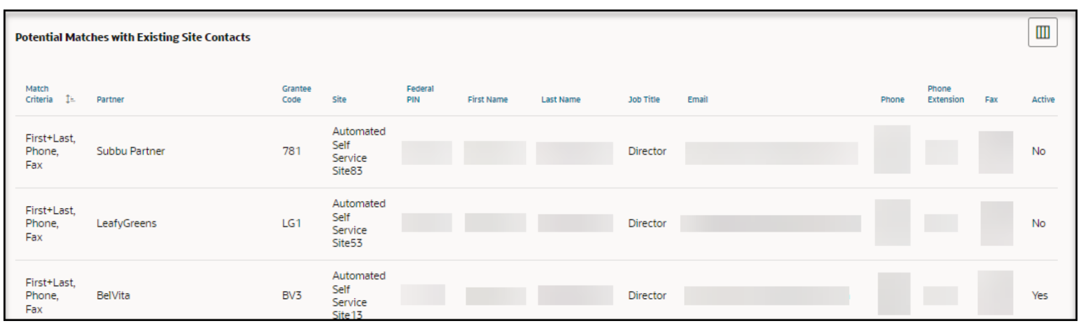
To review the site contacts:

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



> **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.

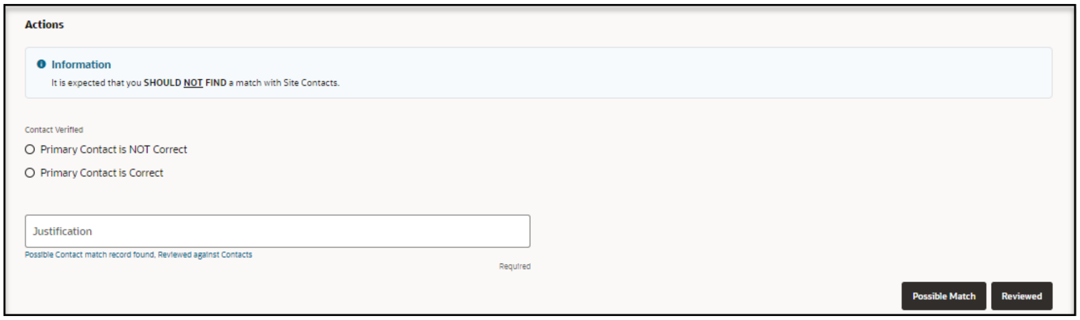
2. Scroll to the **Potential Matches with Existing Site Contacts** section. For example:



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.

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

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



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.

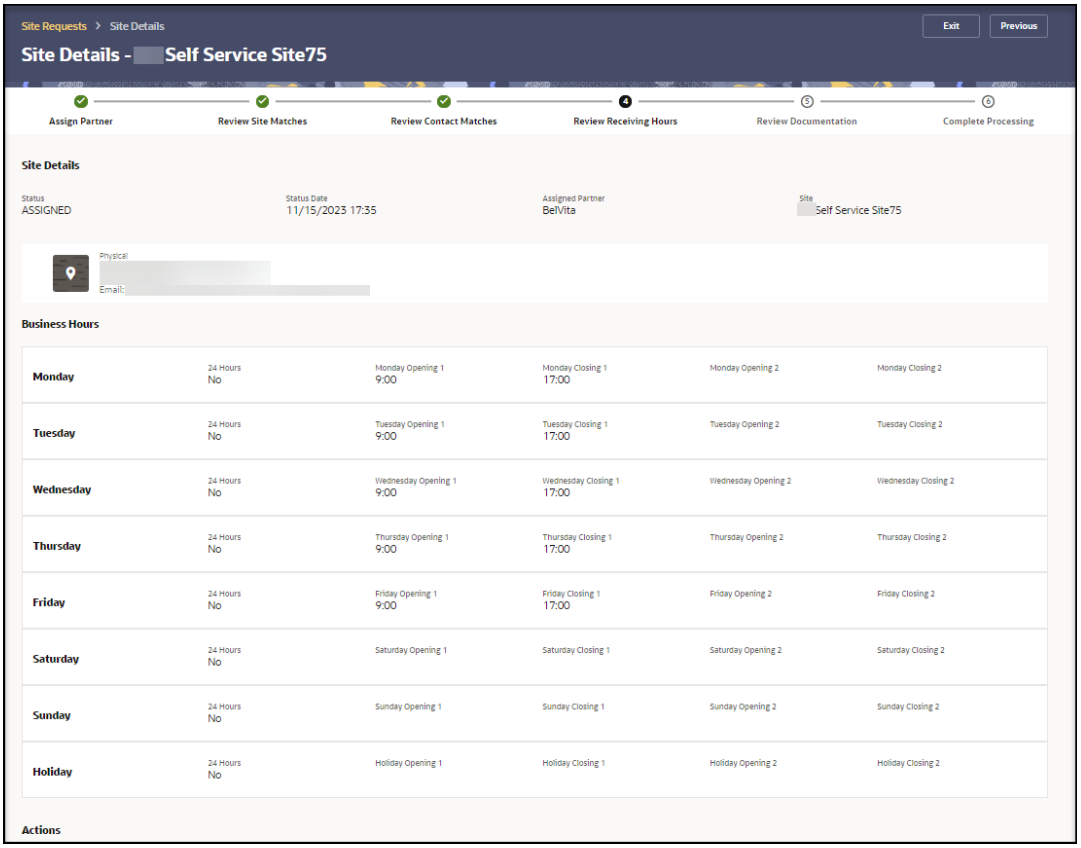
> **Note:**
>
> To continue in the wizard, see Step 4: Review Receiving Hours. To leave the wizard select **Exit**.

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:



> **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:

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.

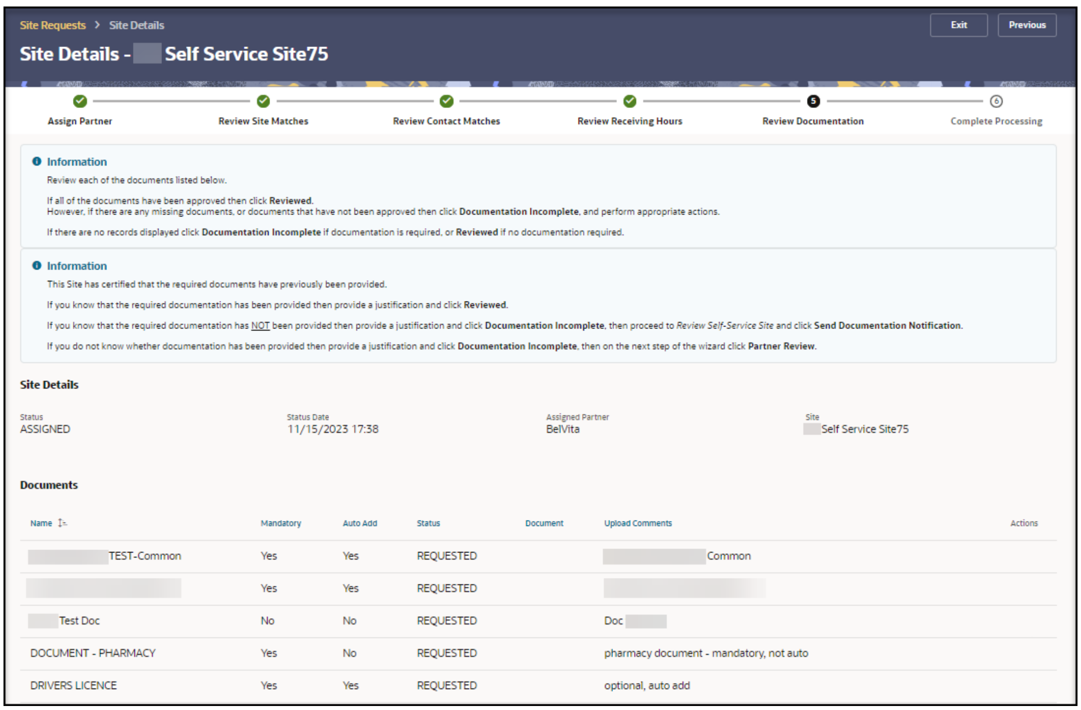
> **Note:**
>
> To continue in the wizard, see Step 5: Review Documentation. To leave the wizard select **Exit**.

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:

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



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:

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, 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.

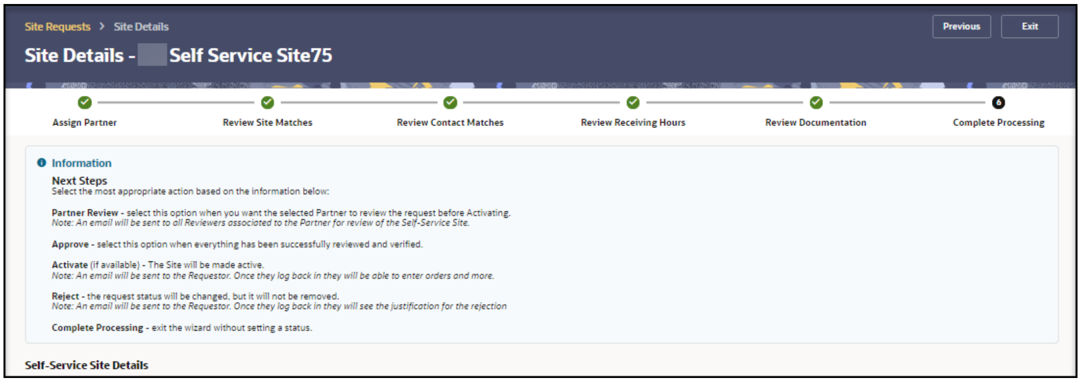
> **Note:**
>
> To continue in the wizard, see Step 6: Complete Processing. To leave the wizard select **Exit**.

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.

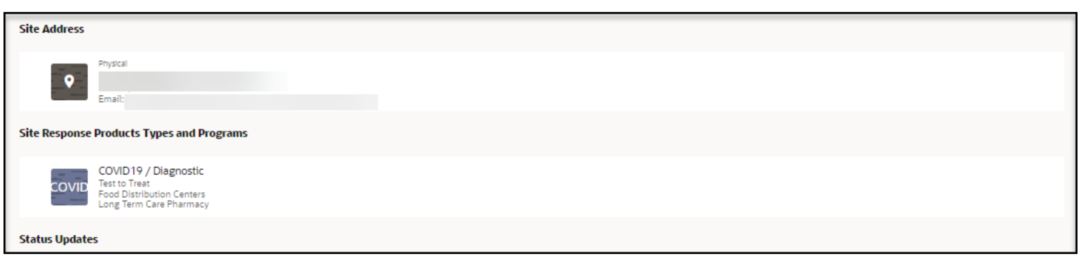
To complete the request approval process with the wizard:

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



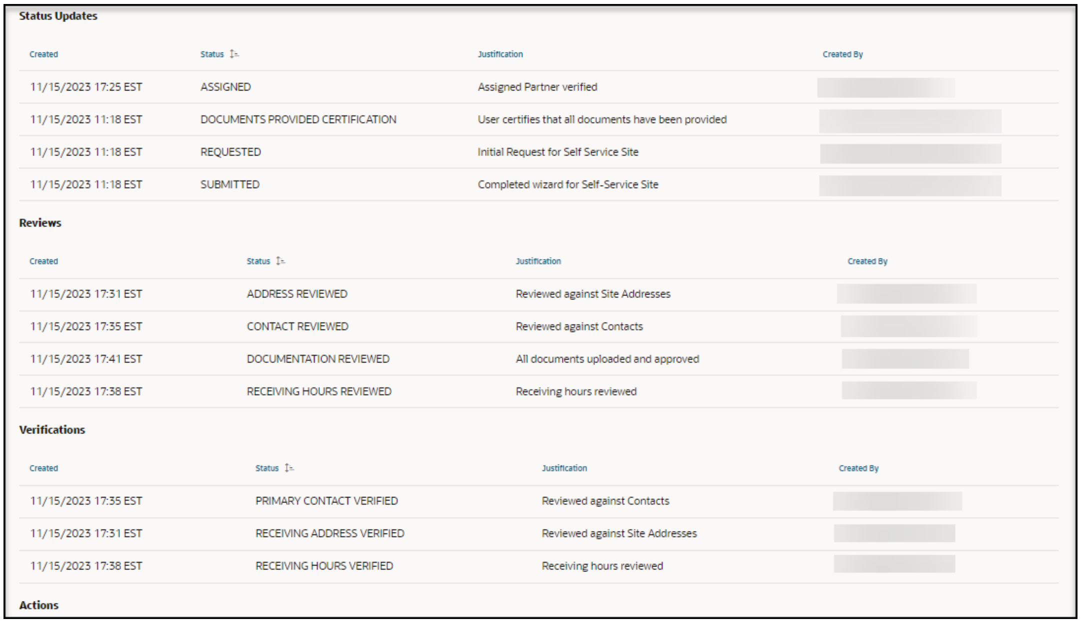
2. Scroll to the **Self-Service Site Details** section. For example:

3. 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:



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

> **Note:**
>
> For descriptions of the statuses, see View the self-service statuses.



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

7. 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 self-service 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

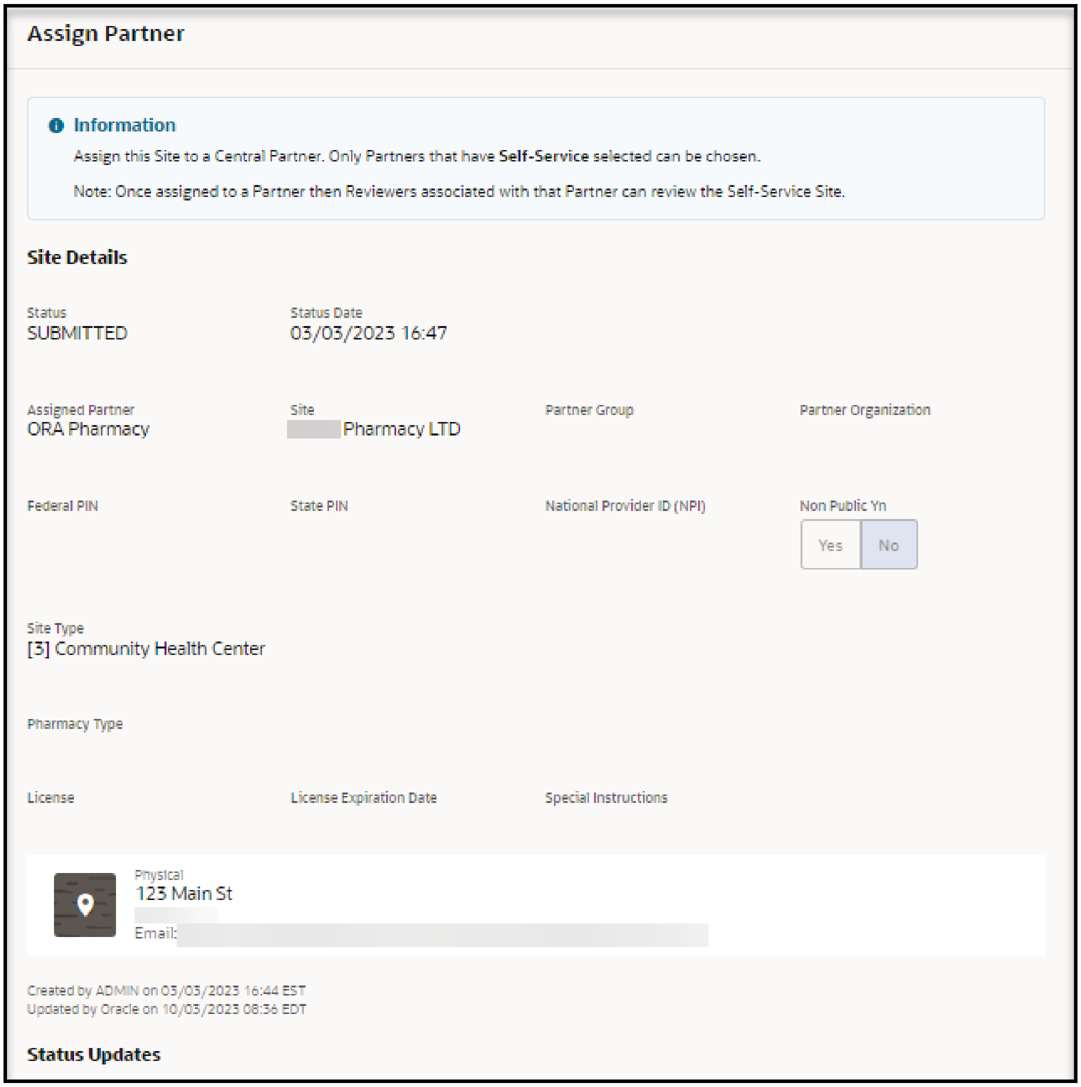
As an approval user, you can assign or modify the assignment of a partner to a site so that reviewers associated with that site can review the associated request details. You can only choose a Self-Service Partner.

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.

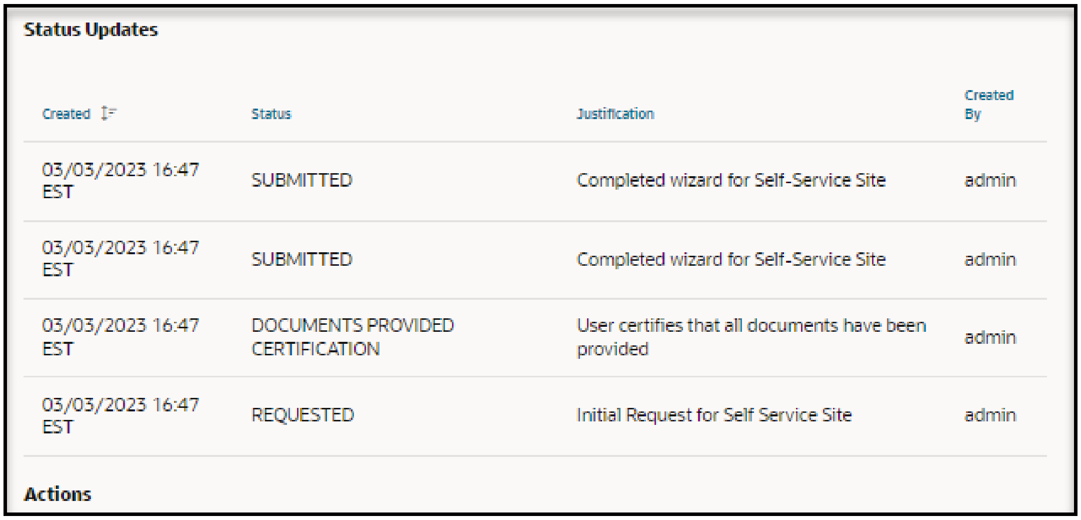
1. Open the **Navigation** pane, and select **Requests**. The All Requests page opens.
2. In the **All Requests** page, find the request you want to assign a partner to the site for, and select **View** in the **Actions** column. The Review Self-Service Site **-** [Site Name] page opens.

3. 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:



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

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



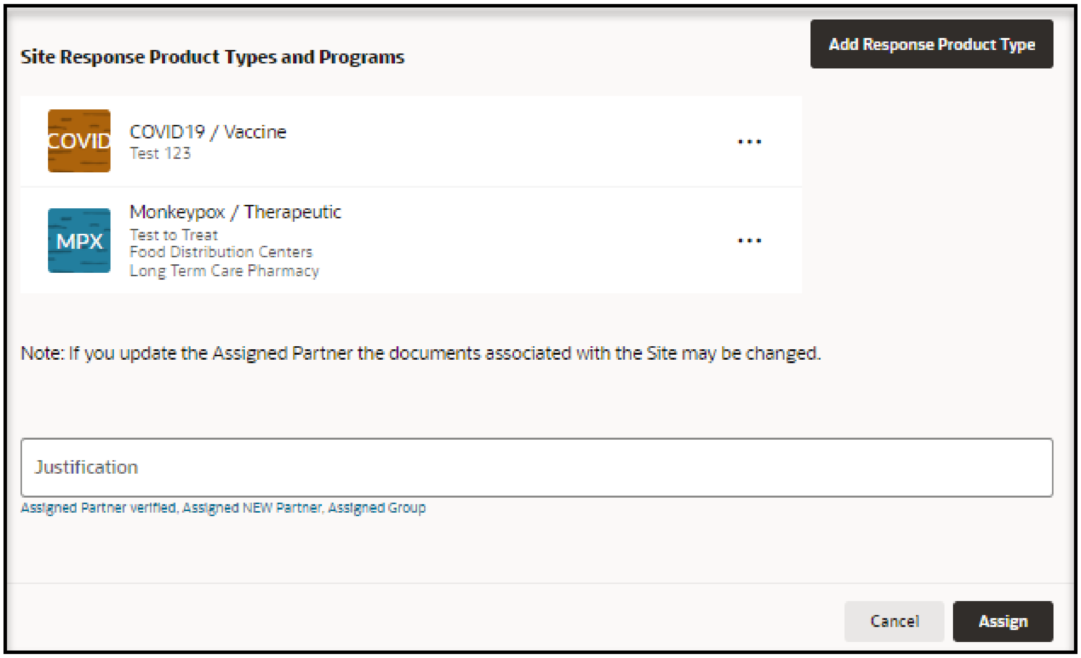
Status Updates

Created	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

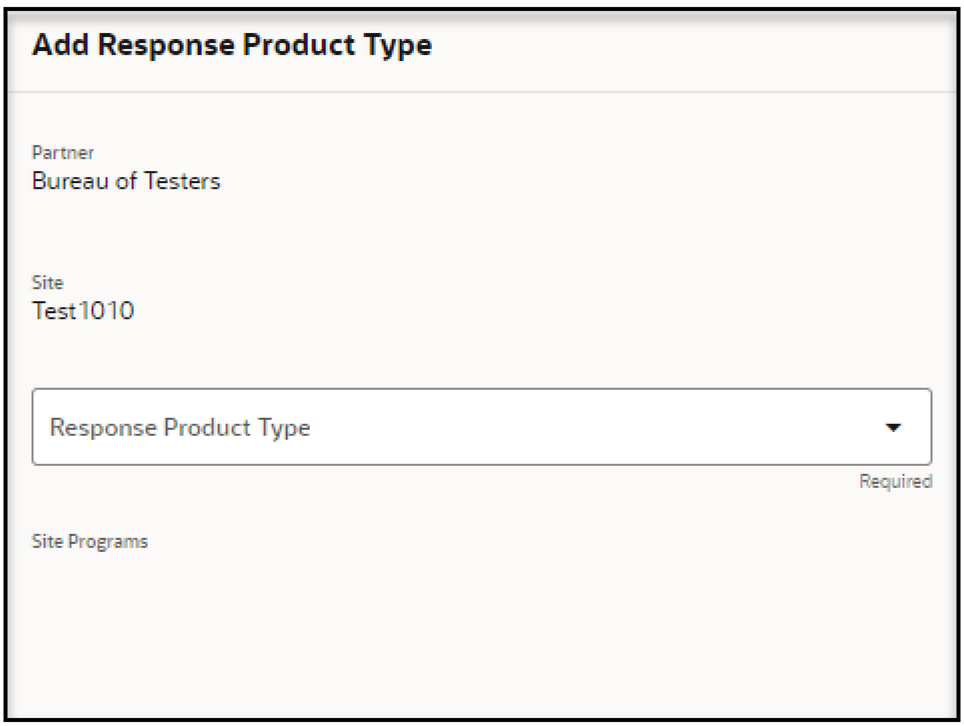
Actions

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

7. In the **Actions** section, provide the following information:
   - **Assigned Partner**—Required. Select or change the partner to assign to this self-service 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:



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:



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**.

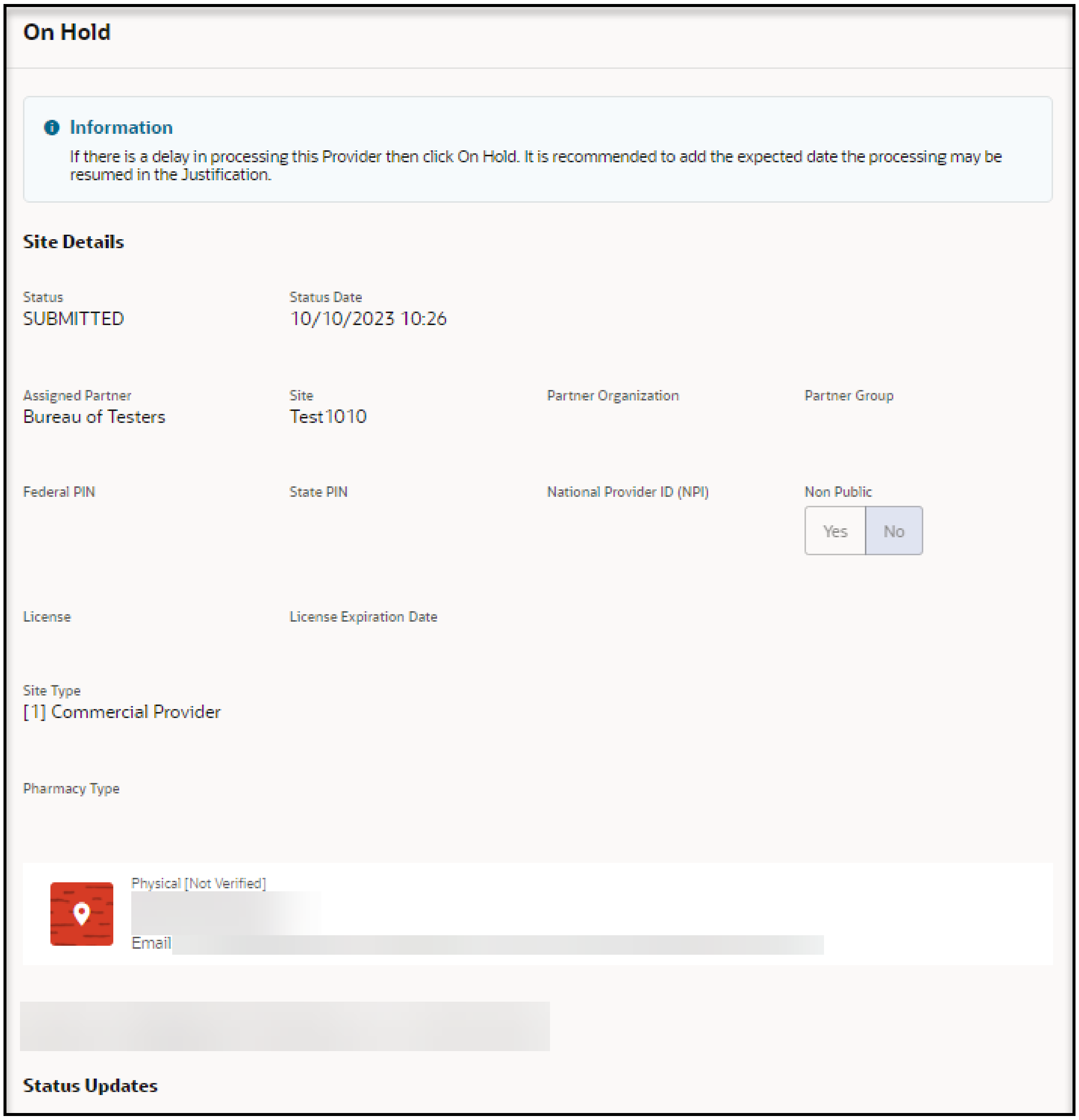
Put a request on hold

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.

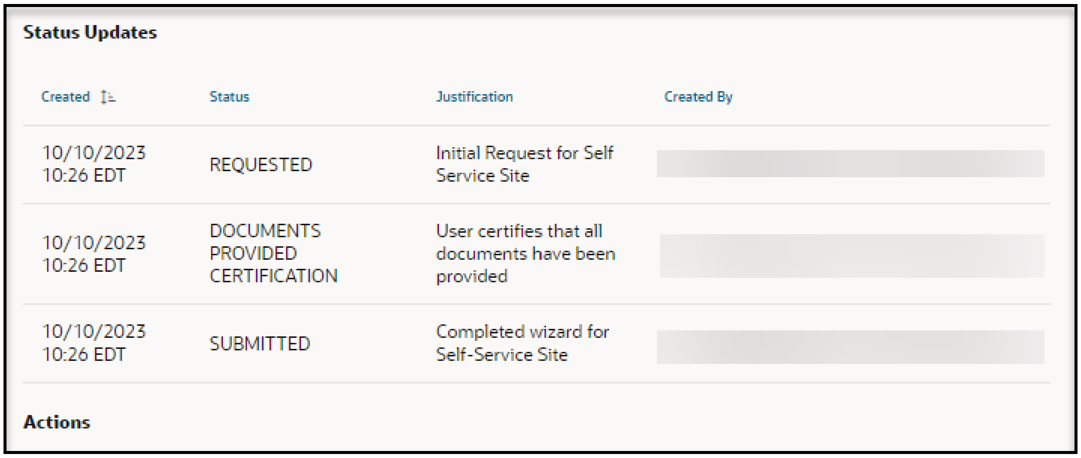
To put a request on hold:

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:



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

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



Status Updates

Created	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:

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).

> **Note:**
>
> We recommend that in the Justification field you enter the date you expect the processing to resume.

8. Select **On Hold**.

> **Note:**
>
> 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

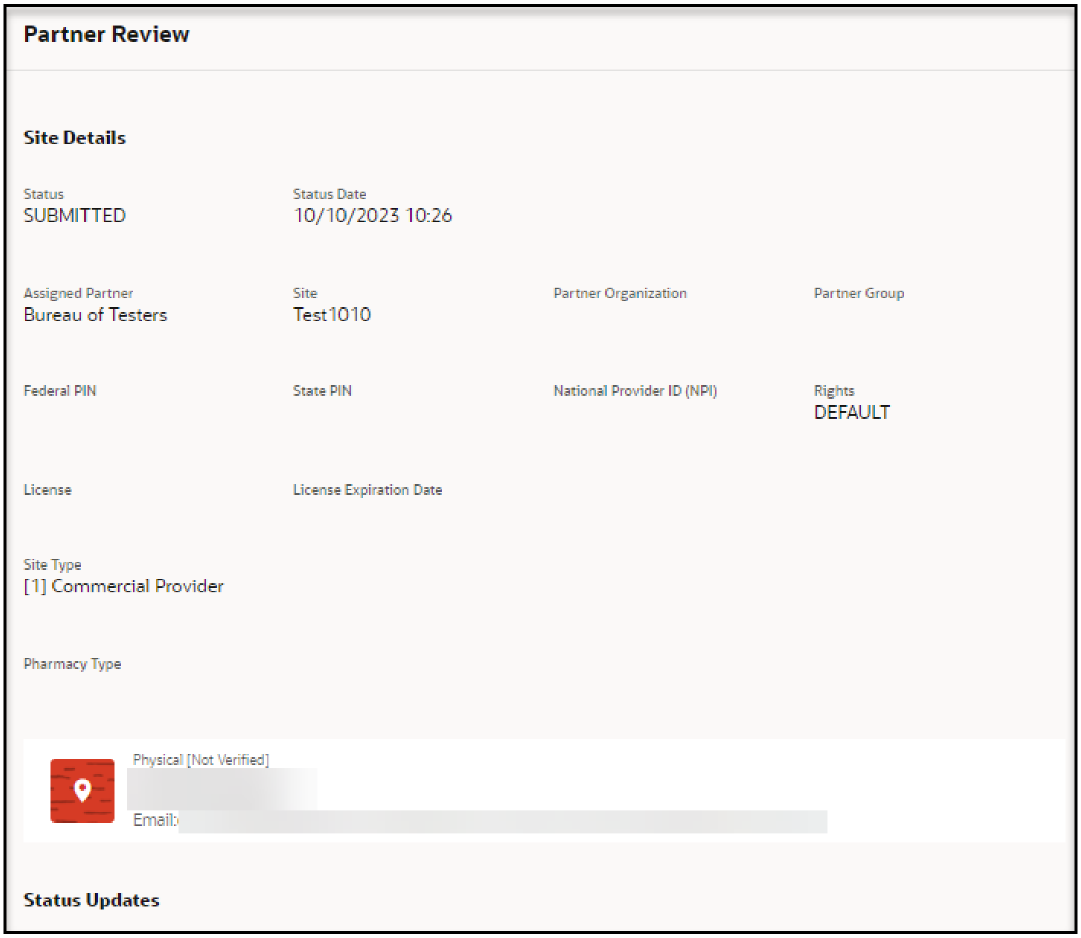
As an approval user, you can choose to have a partner review the request before it is approved and activated.

> **Note:**
>
> Partner reviewers cannot send a request for partner review.

To assign a request for partner review:

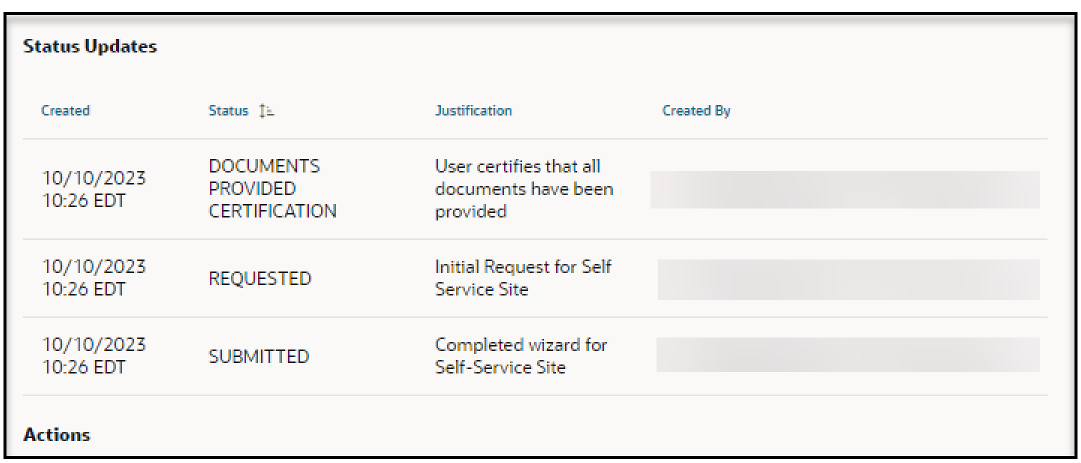
> **Note:**
>
> You can perform this action if you are an approval administrator or an approval reviewer.

1. Open the **Navigation** pane, and select **Requests**. The All Requests page opens.
2. 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.
3. 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:

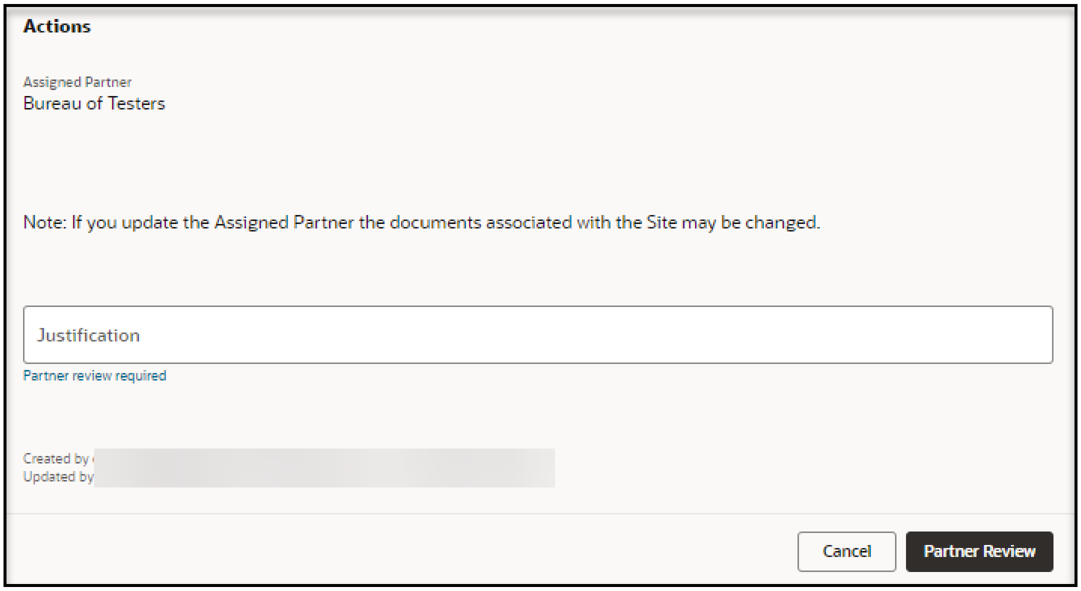


4. Review the information in the **Site Details** section.
5. Scroll to the **Status Updates** section. For example:

> **Note:**
>
> For descriptions of the statuses that appear in the panel, see View descriptions of the request statuses.



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



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.

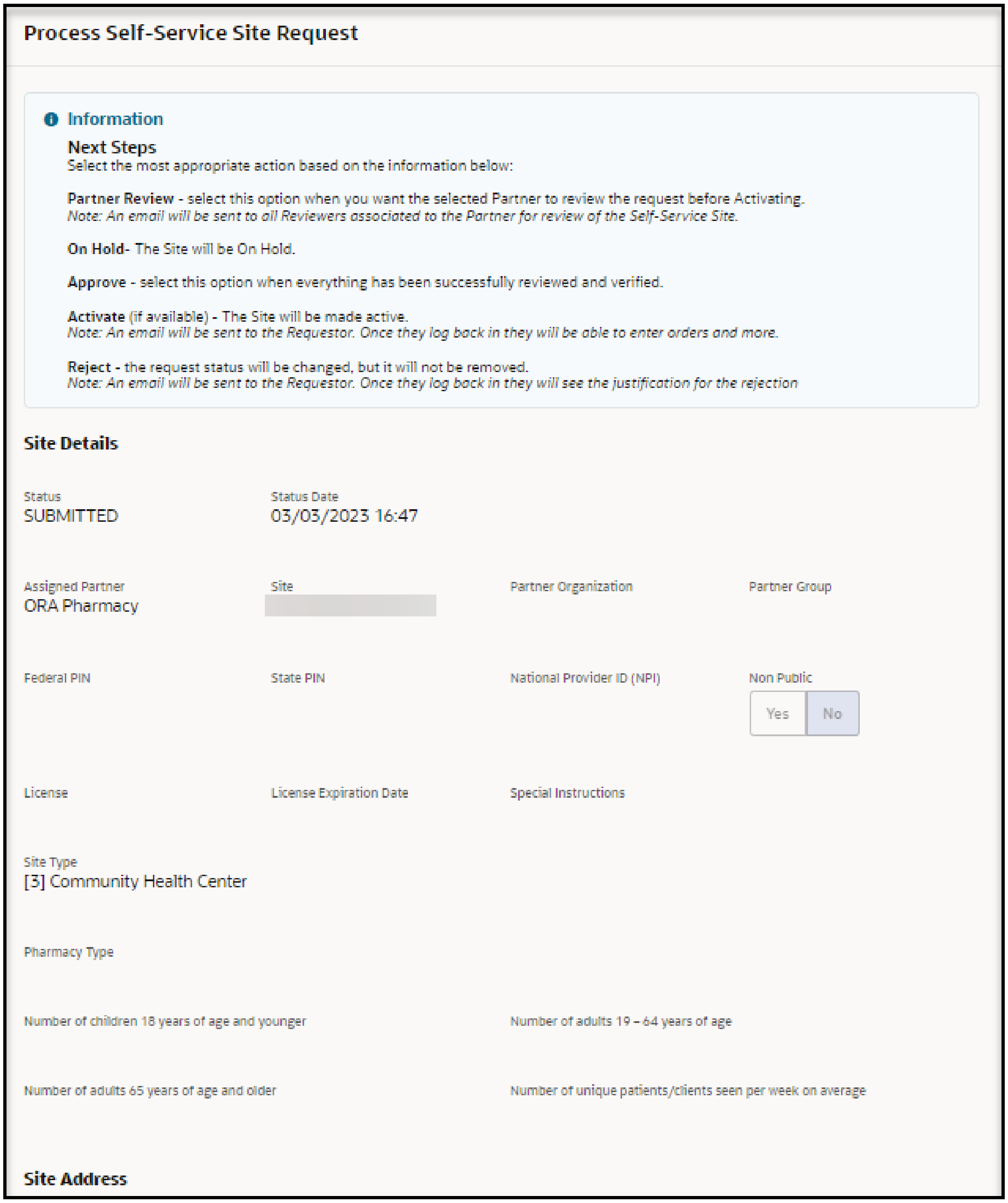
Approve a request

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.

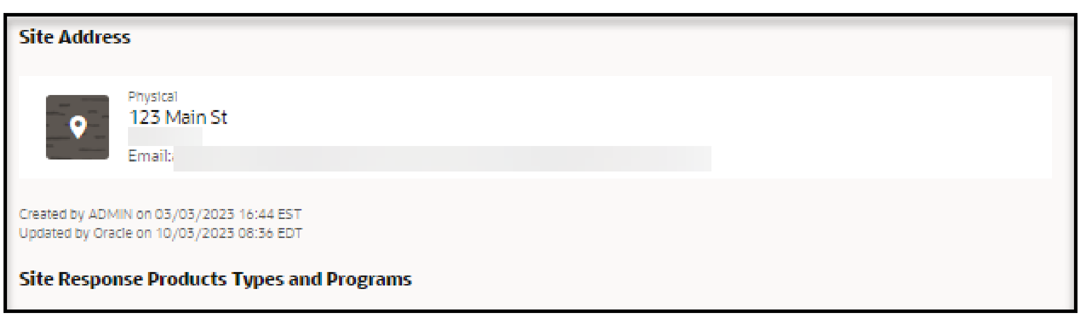
As a partner user, you can approve a request for your partner after all the information in the request is successfully reviewed and verified. An approved request can be activated by an approval self-service administrator.

To approve a request:

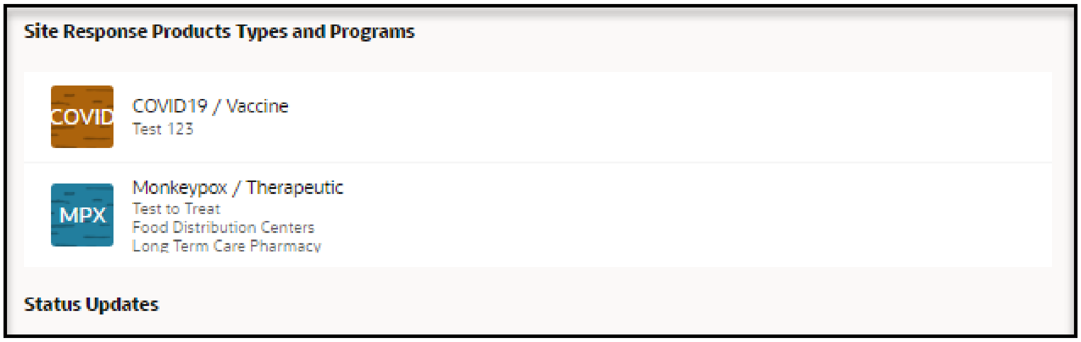
1. Open the **Navigation** pane, and select **Requests**. The All Requests page opens.
2. In the **All Requests** page, find the request you want to approve, and select **View** in the **Actions** column.
3. In the **Review Self-Service Site - [Site Name]** page, at the top right, select **Request Status**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



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

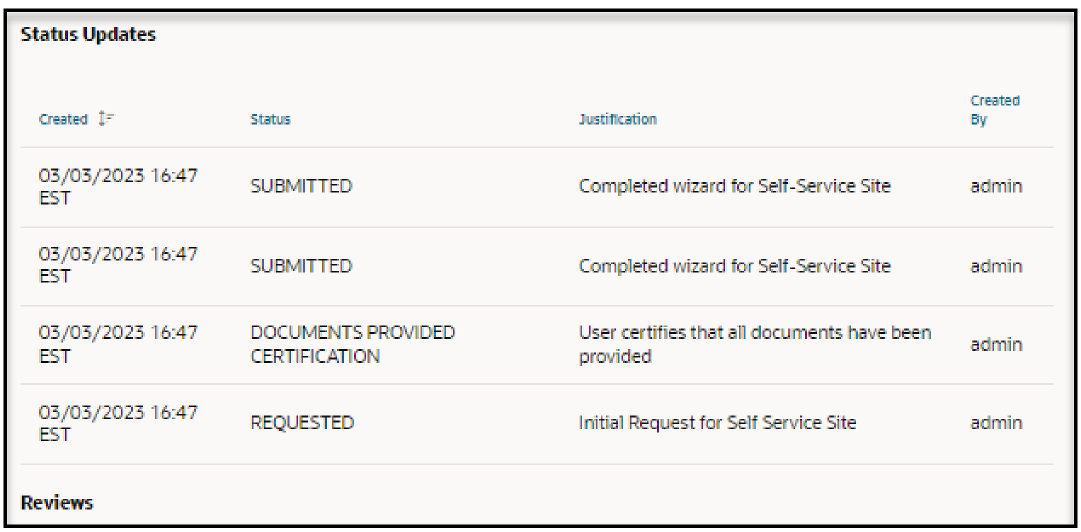


6. Scroll to and review the information in the **Site Response Products Types and Programs** section. For example:



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.

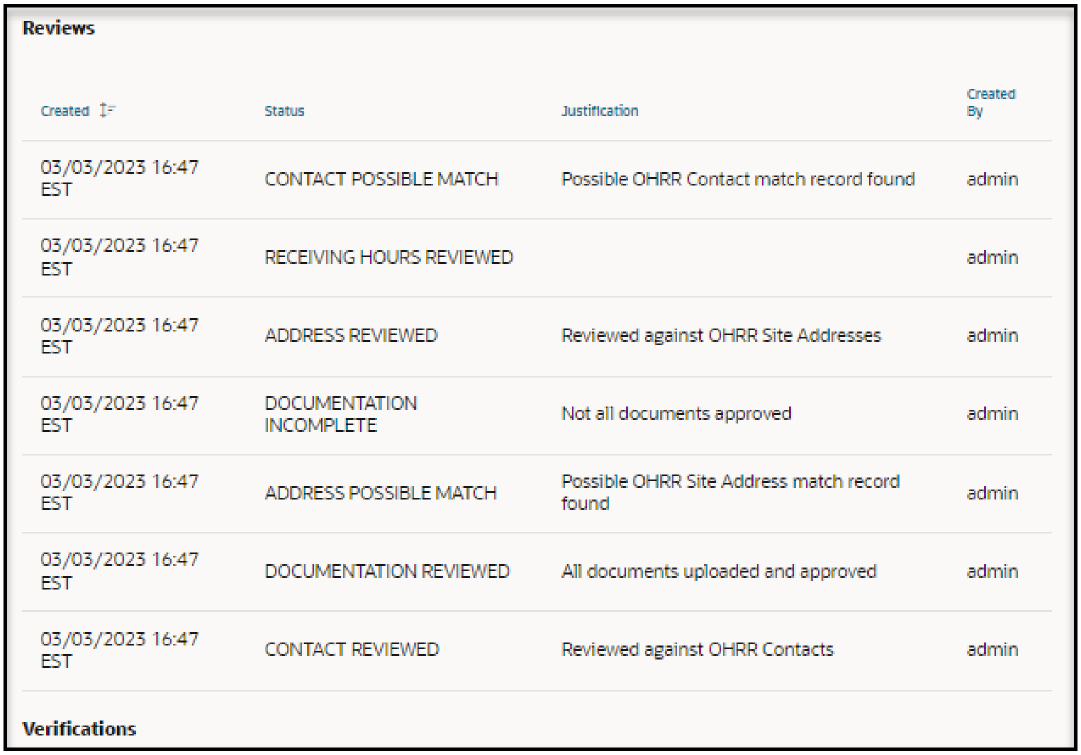


Status Updates

Created	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:

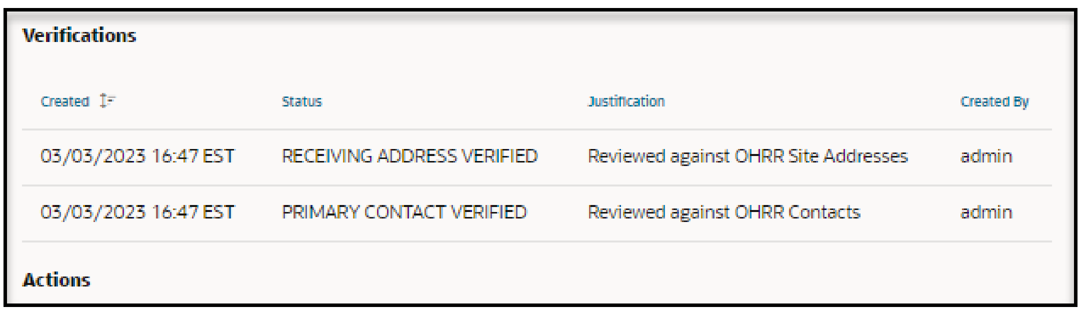


Reviews

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	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:

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.

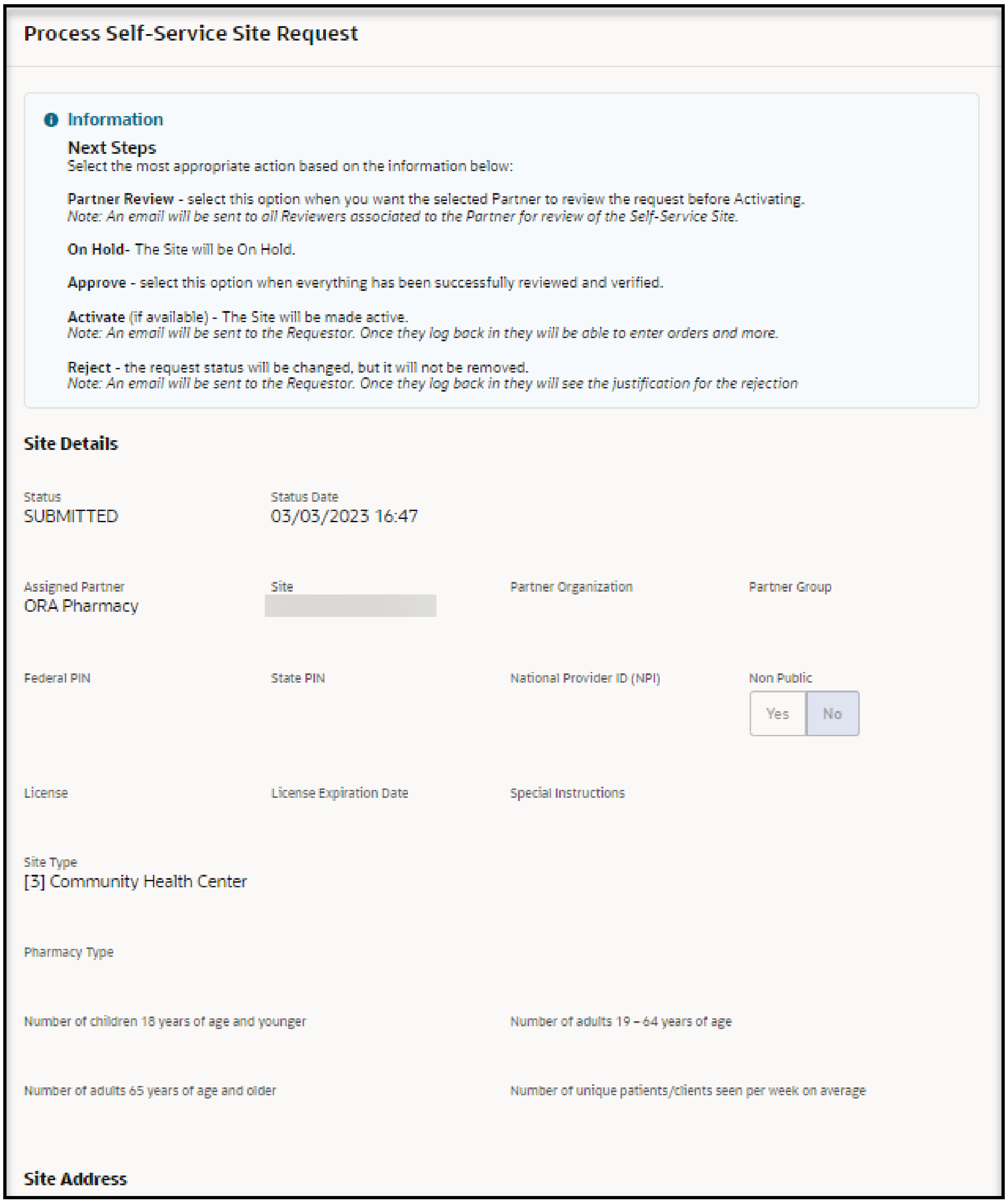
Reject a request

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.

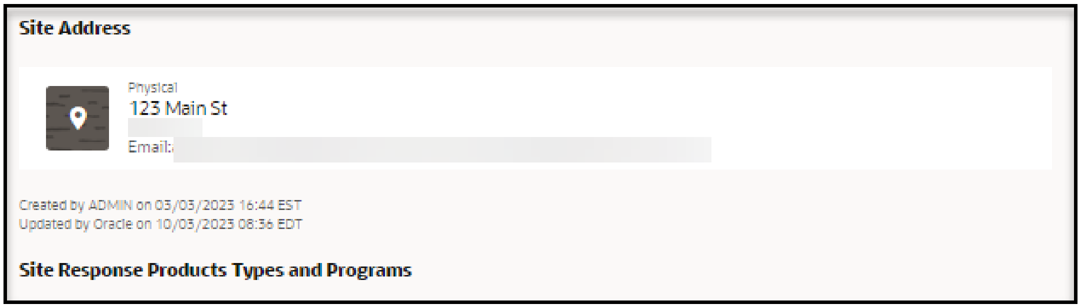
- As an administration reviewer, you can reject any request.
- As a partner reviewer, you can reject a request for your partner.

To reject a request:

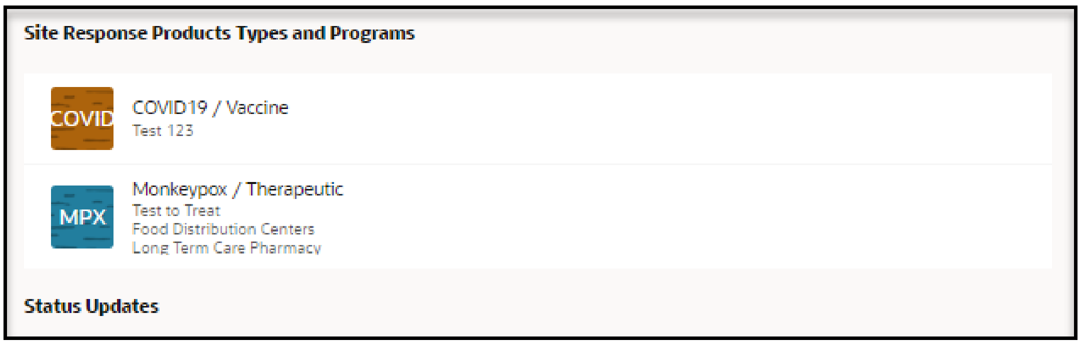
1. Open the **Navigation** pane, and select **Requests**. The All Requests page opens.
2. In the **All Requests** page, find the request you want to reject, and select **View** in the **Actions** column.
3. In the **Review Self-Service Site - [Site Name]** page, at the top right, select **Request Status**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



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

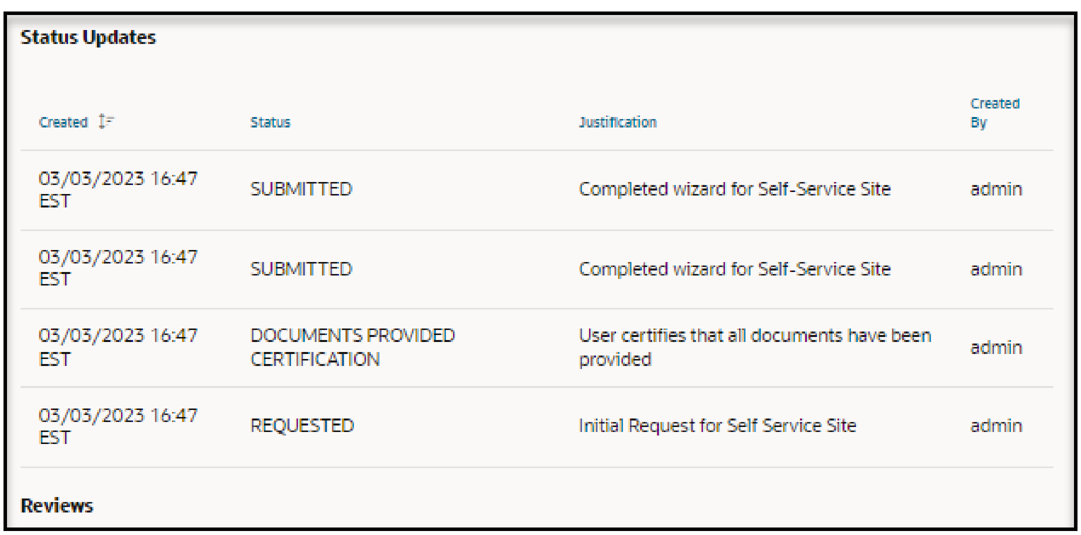


6. Scroll to and review the information in the **Site Response Products Types and Programs** section. For example:



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.

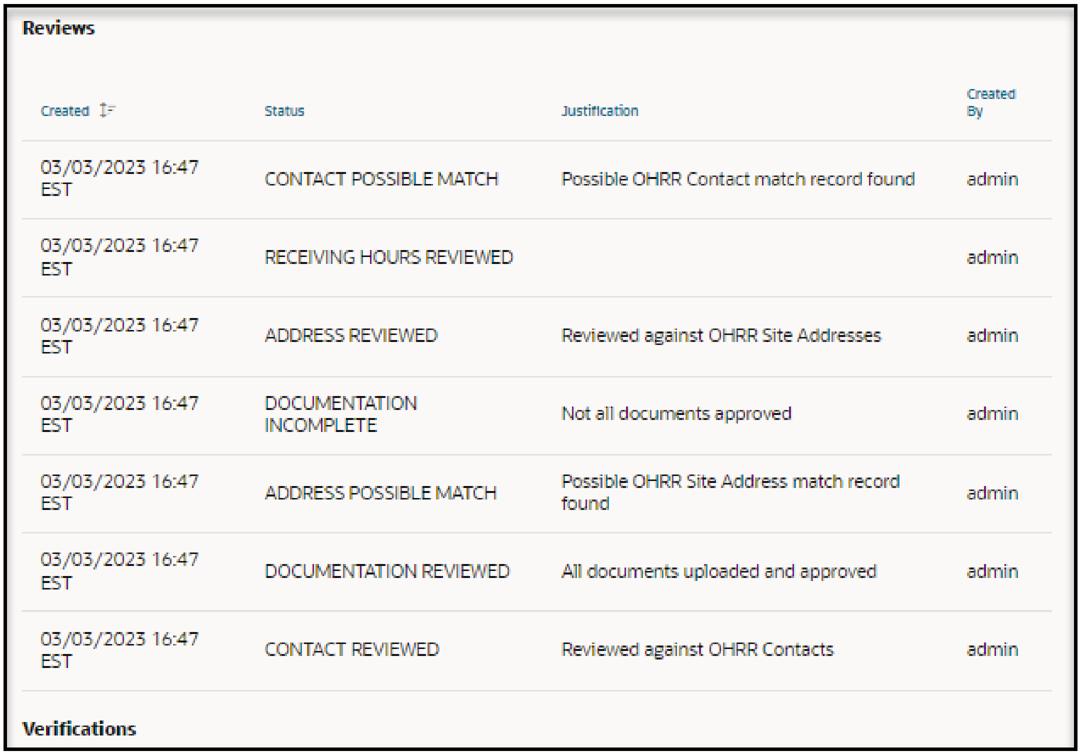


Status Updates

Created	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:

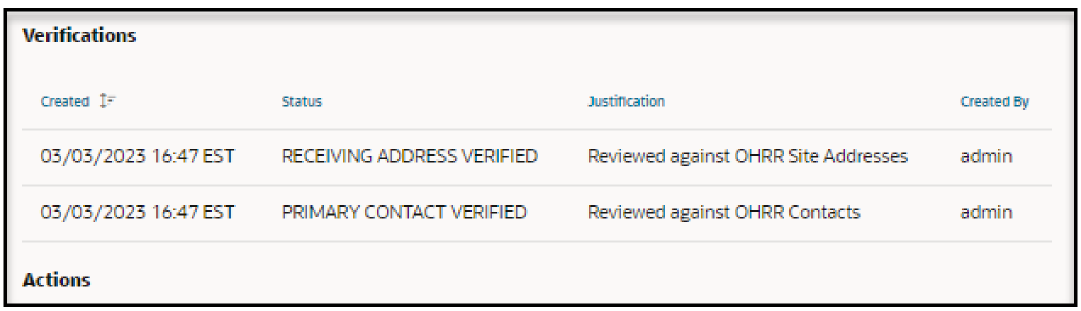


Reviews

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	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:

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.

Note:

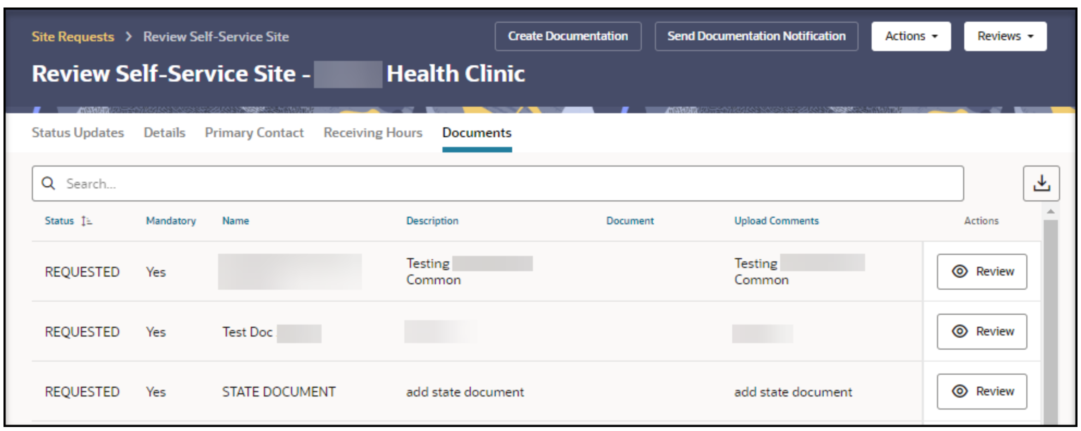
An email is sent to the requestor. When the requestor signs in to Site Portal, they will see the justification for the rejection.

Approve or reject site documents

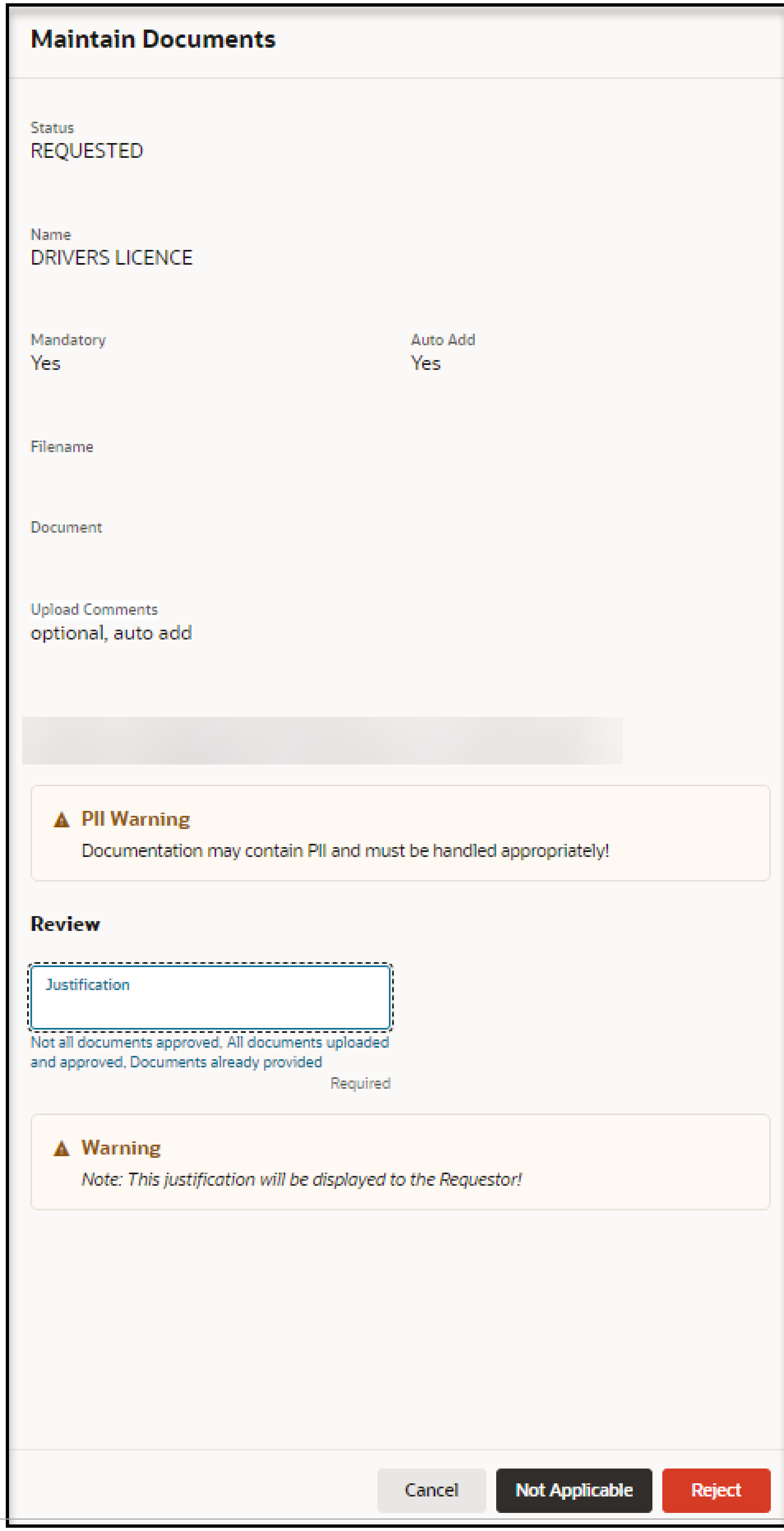
For each request submitted for approval, you can view the site details, primary contact information, and receiving hours provided in Self-Service Request Portal, and the documents (if any) uploaded by an administrator or partner provides many details about the request and its status.

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:



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 must 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
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:

> **Note:**
>
> 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.

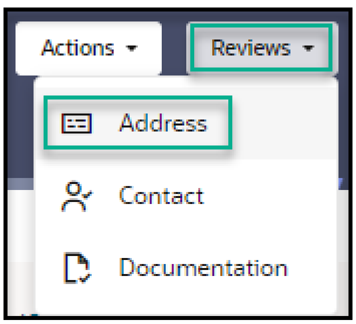
- Review the site addresses
  You can review the site addresses to check for a match between the site addresses uploaded by an administrator against the site information in the request. You **should not find** a match with the site addresses.
- Review the site contacts
  You can review the site contacts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

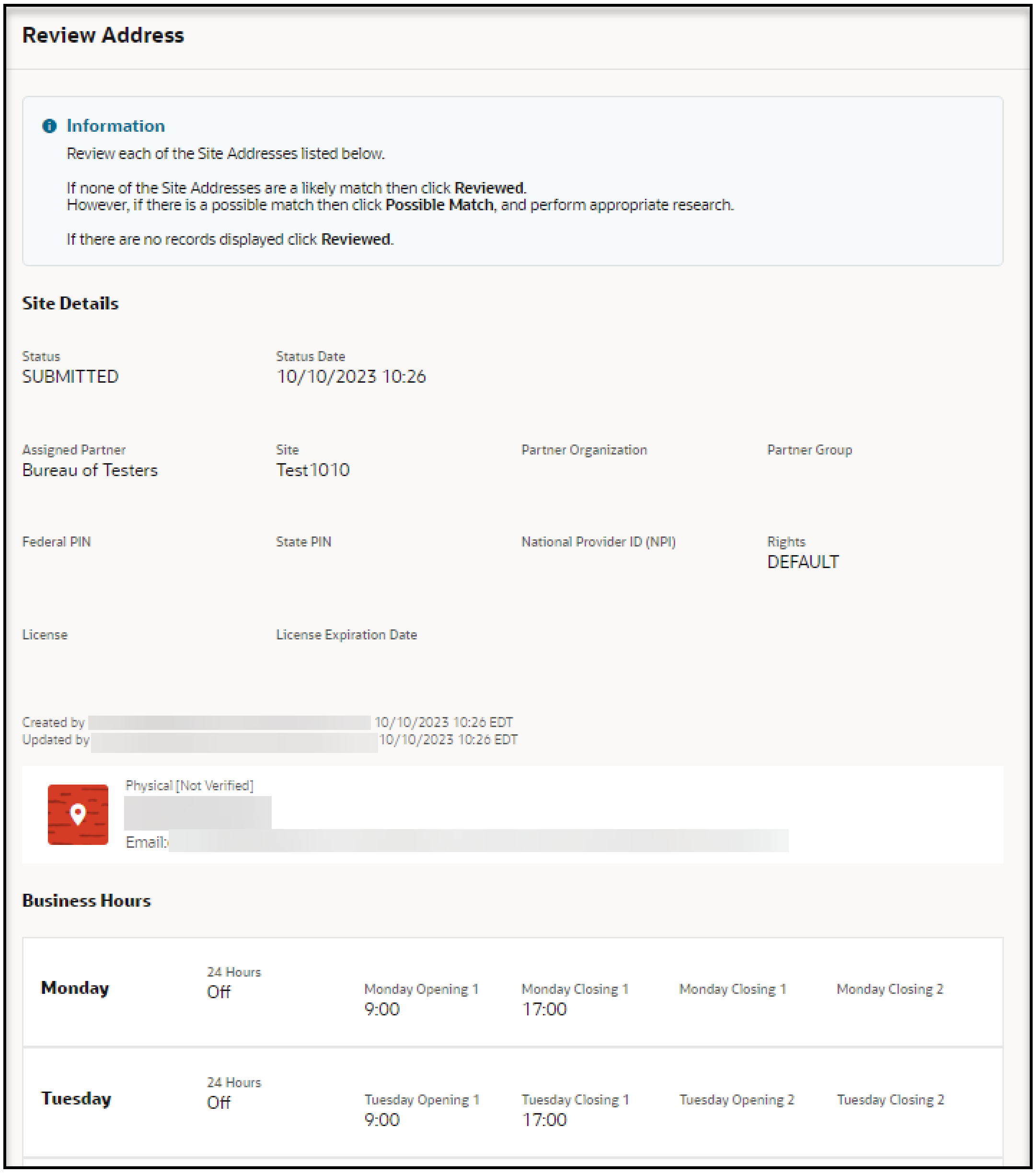
You can review the site addresses to check for a match between the site addresses uploaded by an administrator against the site information in the request. You **should not find** a match with the site addresses.

To review the site addresses:

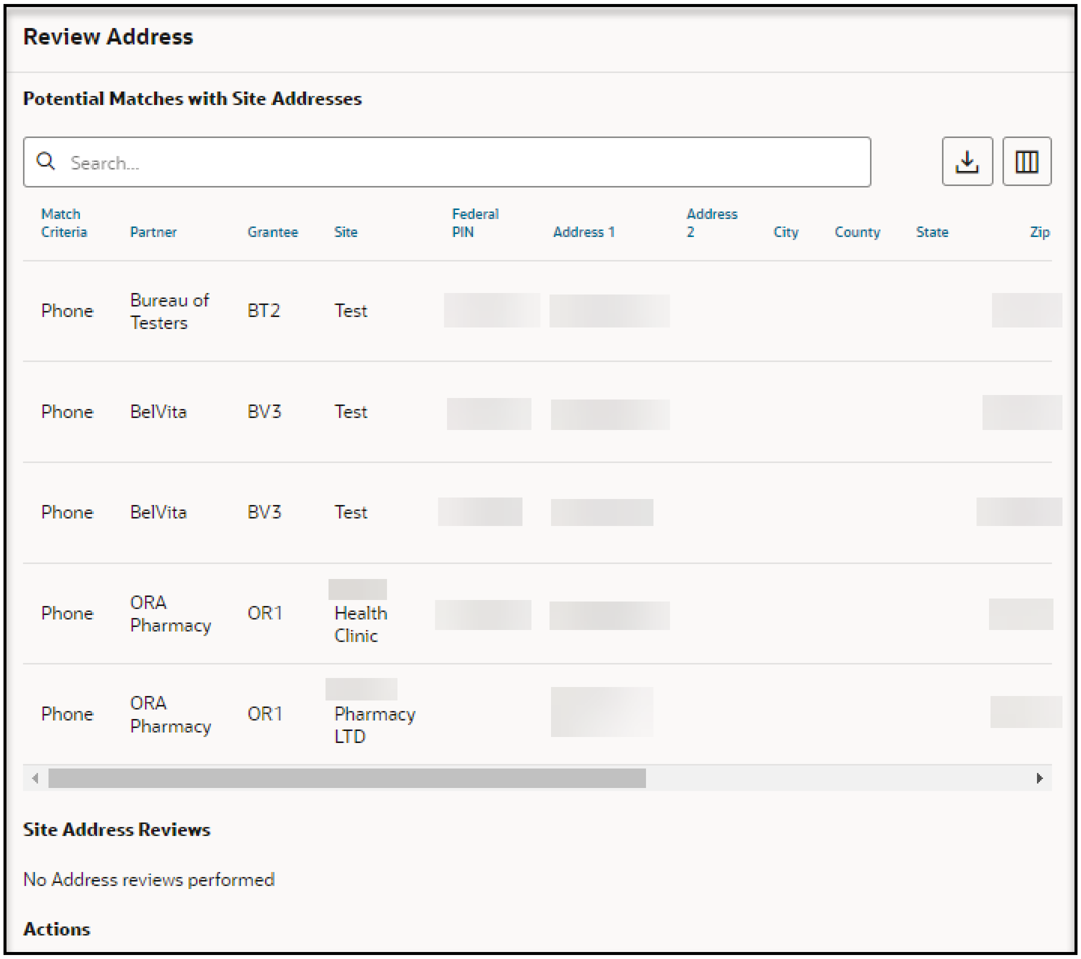
1. Open the **Navigation** pane, and select **Requests**. The All Requests page opens.
2. In the **All Requests** page, find the request you want to review site addresses for, and select **View** in the **Actions** column. The Review Self-Service Site - [Site Name] page opens. Select any tab; the tab 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:



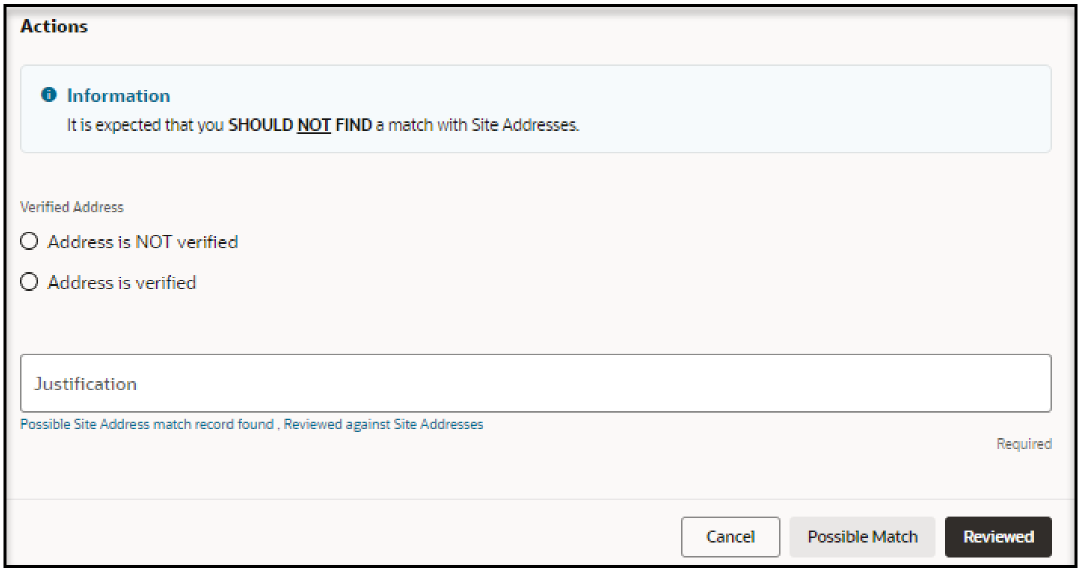
4. Review the information in the **Site Details** and **Business Hours** sections. This information was entered by the requestor.
5. Scroll to the **Potential Matches with Site Addresses** and **Site Address Reviews** sections. For example:



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.

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

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



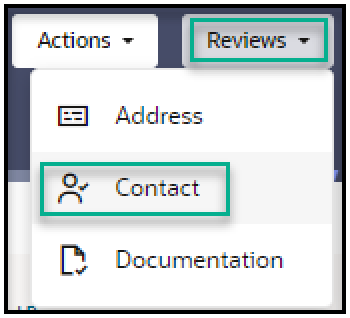
8. In the required **Verified Address** field, select one of the following options:
   - **Address is NOT verified**
   - **Address is verified**
9. In the required **Justification** field, enter a description that describes your review of the entries in the panel. You can enter text, or select a quick pick link (for example, Possible 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

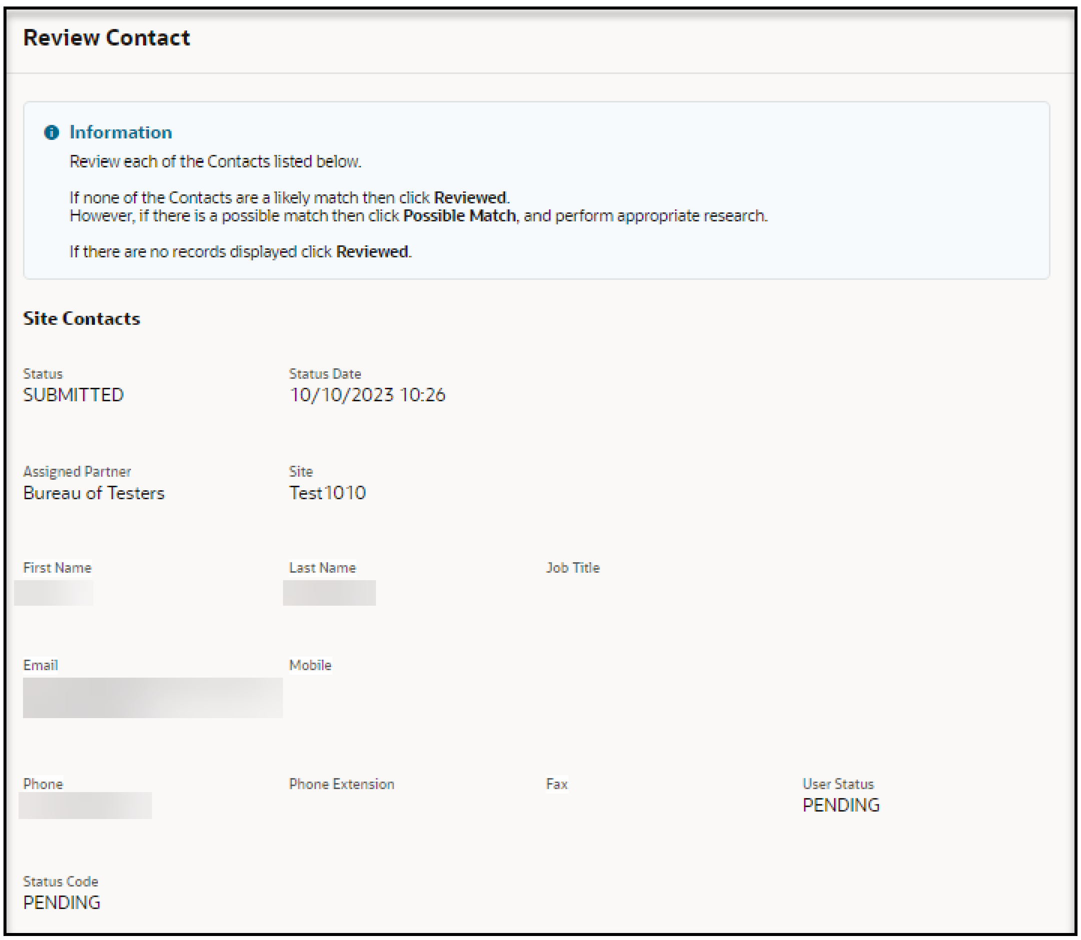
You can review the site contacts to check for a match between the site contacts uploaded by an administrator and the site information in the request. You **should not find** a match with the site contacts.

To review the site contacts:

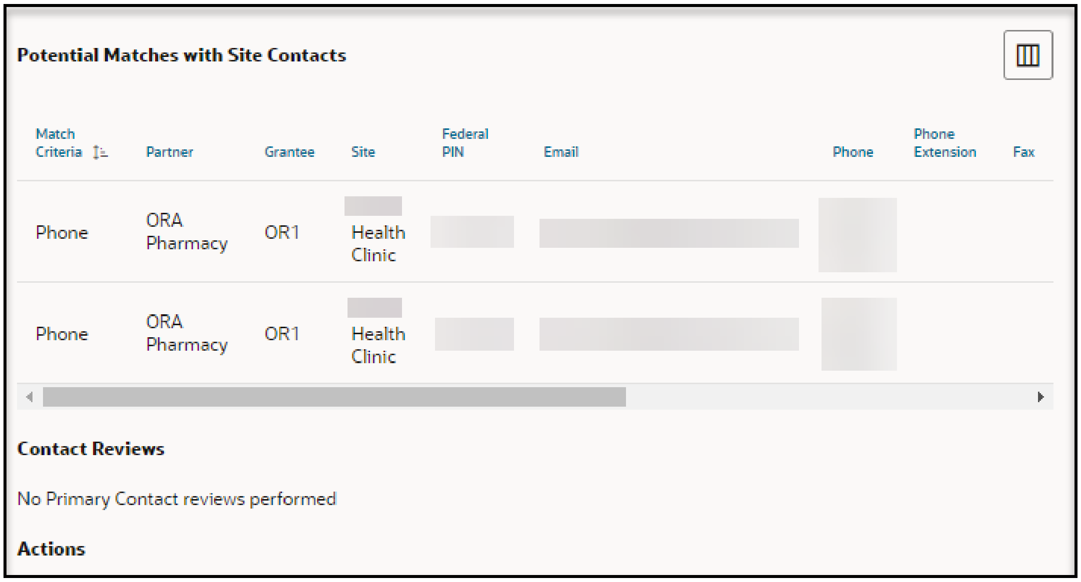
1. Open the **Navigation** pane, and select **Requests**. The All Requests page opens.
2. In the **All Requests** page, find the request you want to review site contacts for, and select **View** in the **Actions** column. The Review Self-Service Site - [Site Name] page opens.
3. In the **Review Self-Service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



The **Review Contact** panel opens. For example:



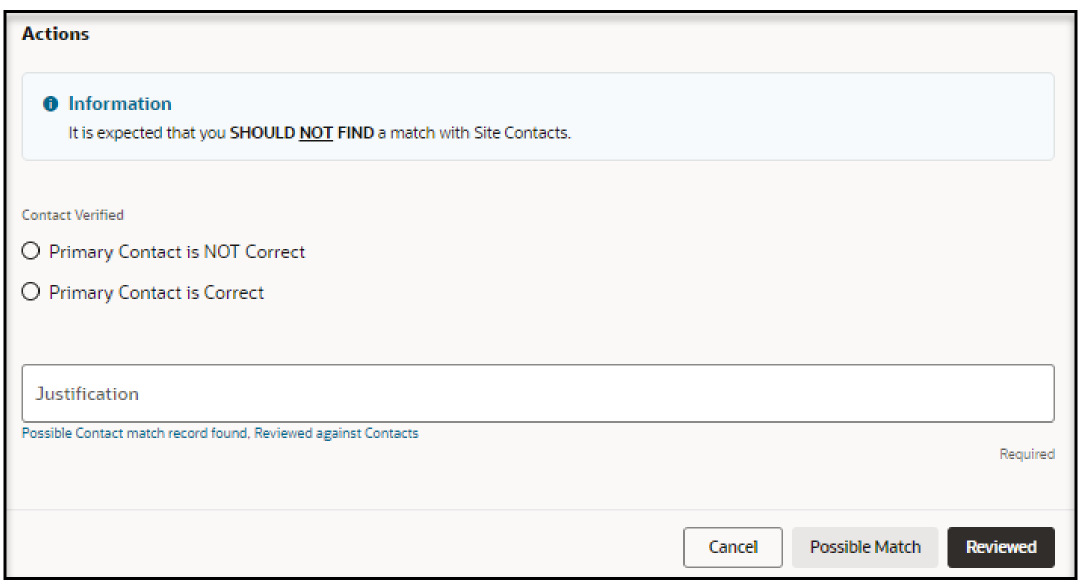
4. Review the information in the **Site Contacts** section. This information was entered by the requestor.
5. Scroll to the **Potential Matches with Site Contacts** and **Contact Reviews** sections. For example:



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:



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

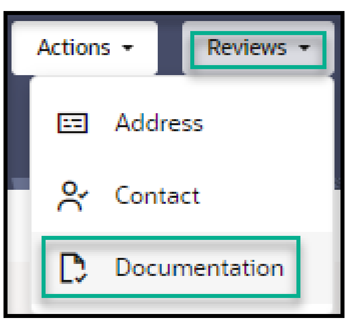
Approval users can review the common and partner documents that were uploaded by an administrator or partner.

However:

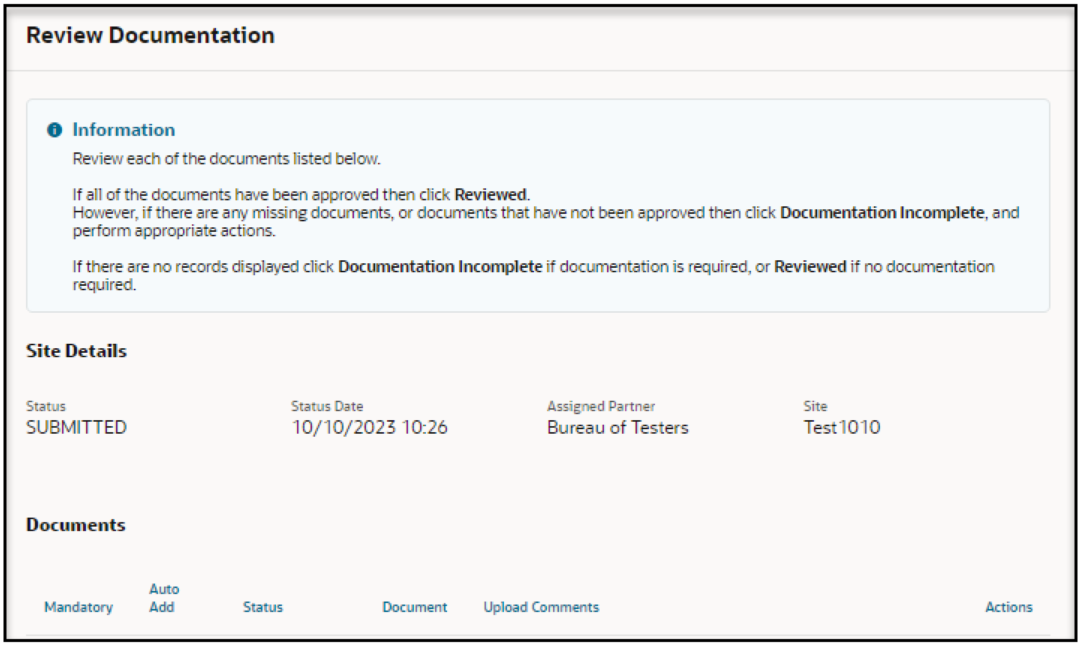
- Only approval self-service administrators can modify common documents.
- Only approval self-service administrators and partner self-service administrators can modify partner documents.
- Partner users can view the partner documents that were uploaded by an administrator or by a partner for their partner.

To review the documentation:

1. Open the **Navigation** pane, and select **Requests**. The All Requests page opens.
2. 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:

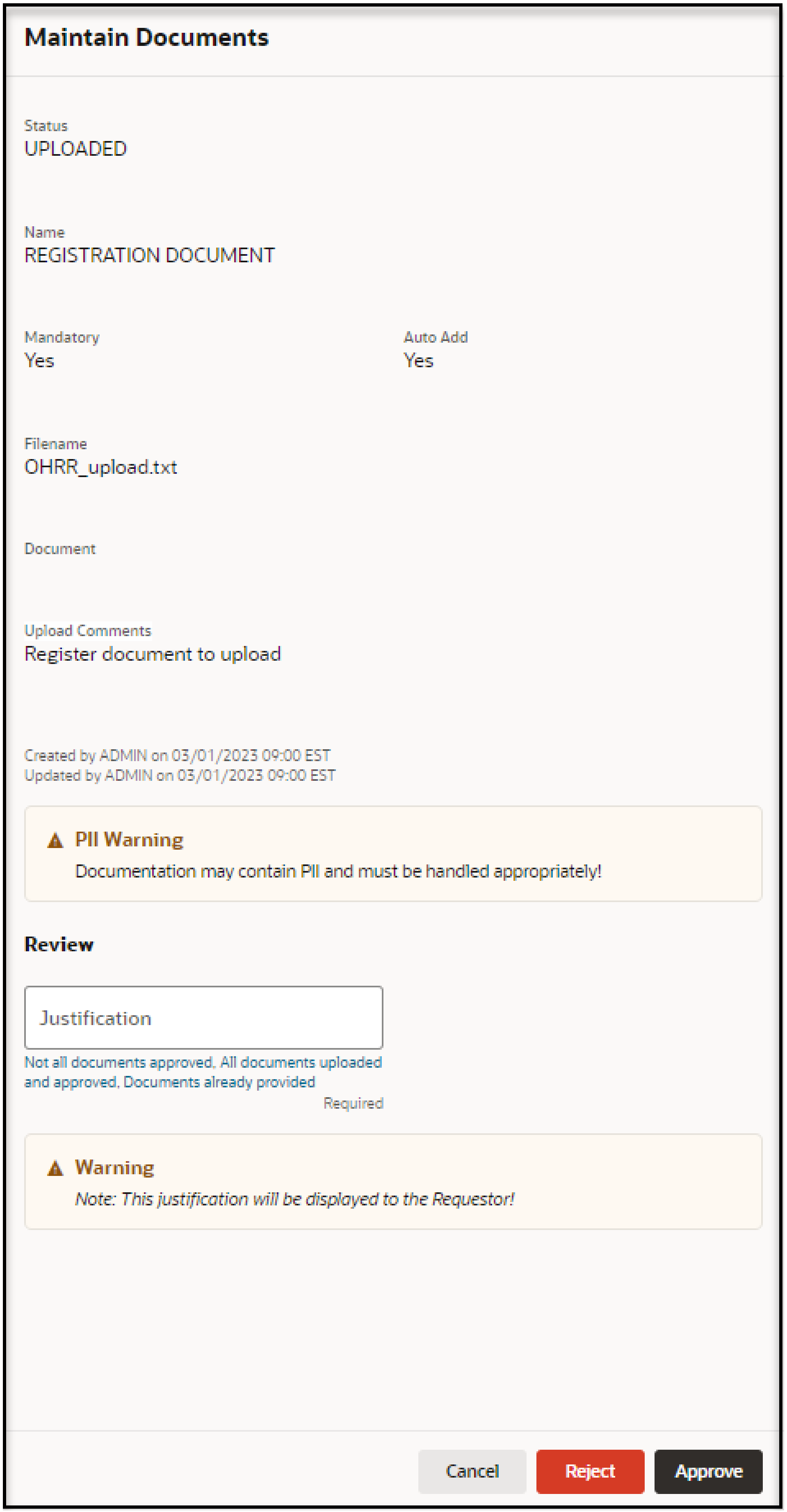
   

   The **Review Documentation** panel opens. For example:

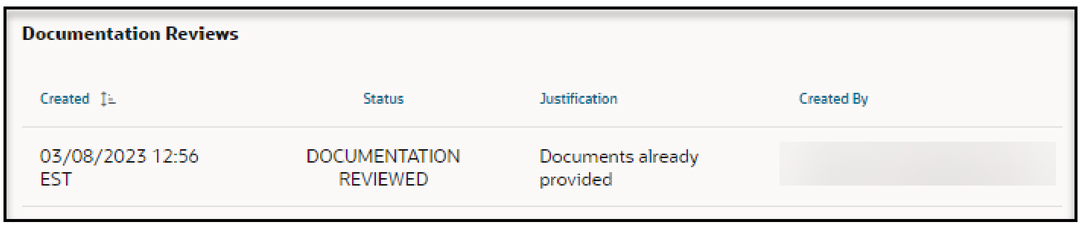


4. Review the information in the **Site Details** section. This information was entered by the requestor.
5. Scroll to the **Documents** section. For example:
6. To review the details for a document, find it in the list in the **Documents** section, and select **Review** in the **Actions** column. The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

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

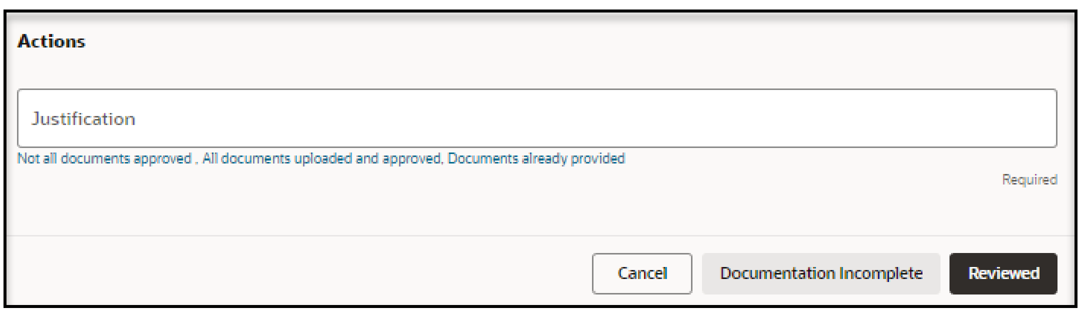

Maintain Documents
Status
UPLOADED
Name
REGISTRATION DOCUMENT
Mandatory
Yes
Auto Add
Yes
Filename
OHRR_upload.txt
Document
Upload Comments
Register document to upload
Created by ADMIN on 03/01/2023 09:00 EST
Updated by ADMIN on 03/01/2023 09:00 EST
PII Warning
Documentation may contain PII and must be 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

7. 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	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:



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.

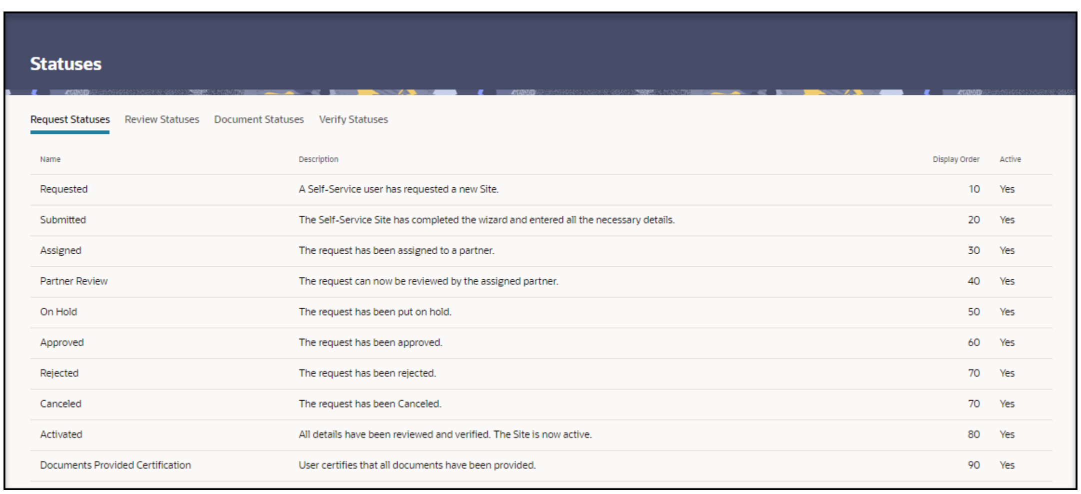
- View descriptions of the request statuses
  The request statuses indicate the status of a request with a unique name, a description of the status, and whether the status is active.
- View descriptions of the review statuses
  The review statuses indicate the status of a review with a unique name, a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



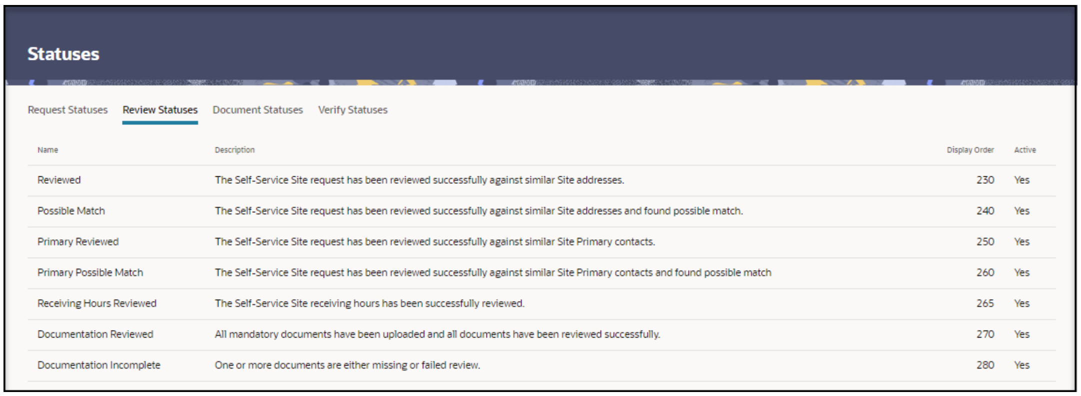
Name	Description	Display Order	Active
Requested	A Self-Service user has requested a new Site.	10	Yes
Submitted	The Self-Service Site has completed the wizard and entered all the necessary details.	20	Yes
Assigned	The request has been assigned to a partner.	30	Yes
Partner Review	The request can now be 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:



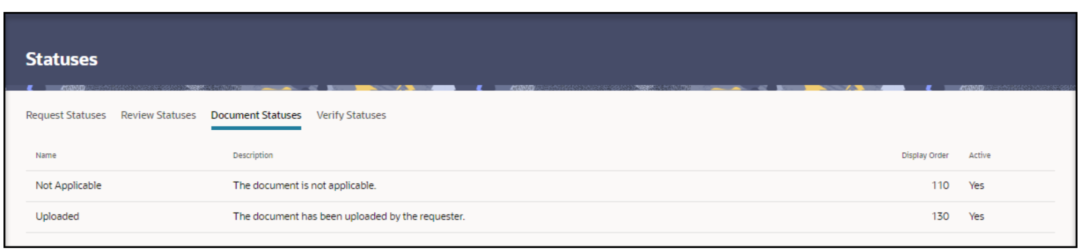
Name	Description	Display Order	Active
Reviewed	The Self-Service Site request has been reviewed successfully against similar Site addresses.	230	Yes
Possible Match	The Self-Service Site request has been reviewed successfully against similar Site addresses and found possible match.	240	Yes
Primary Reviewed	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:



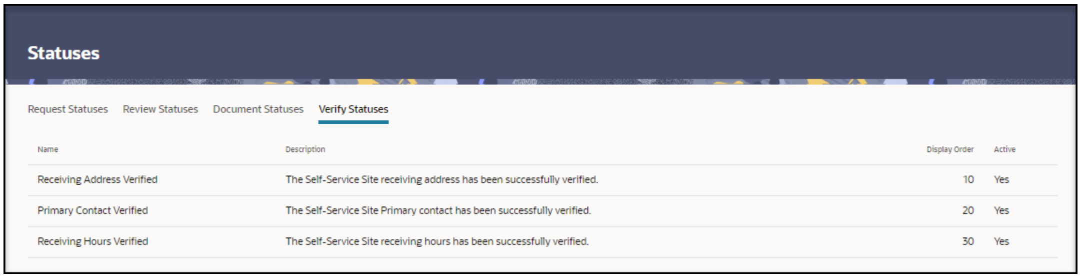
Name	Description	Display Order	Active
Not Applicable	The document is not applicable.	110	Yes
Uploaded	The document has been uploaded by the requester.	130	Yes

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

Request Statuses Review Statuses Document 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