Job Aid

REVIEW A CASE REQUEST

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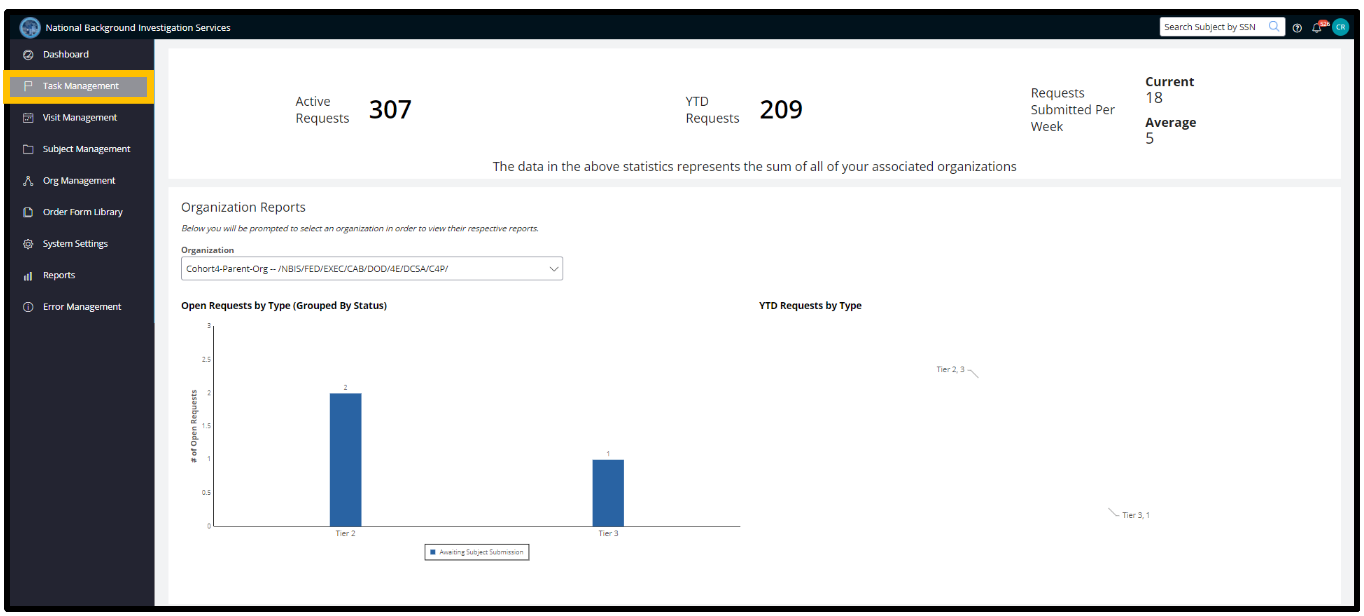
Purpose: Learn how to review a case request, the second step in the Initiate, Review, and Authorize process.

REVIEW A CASE REQUEST

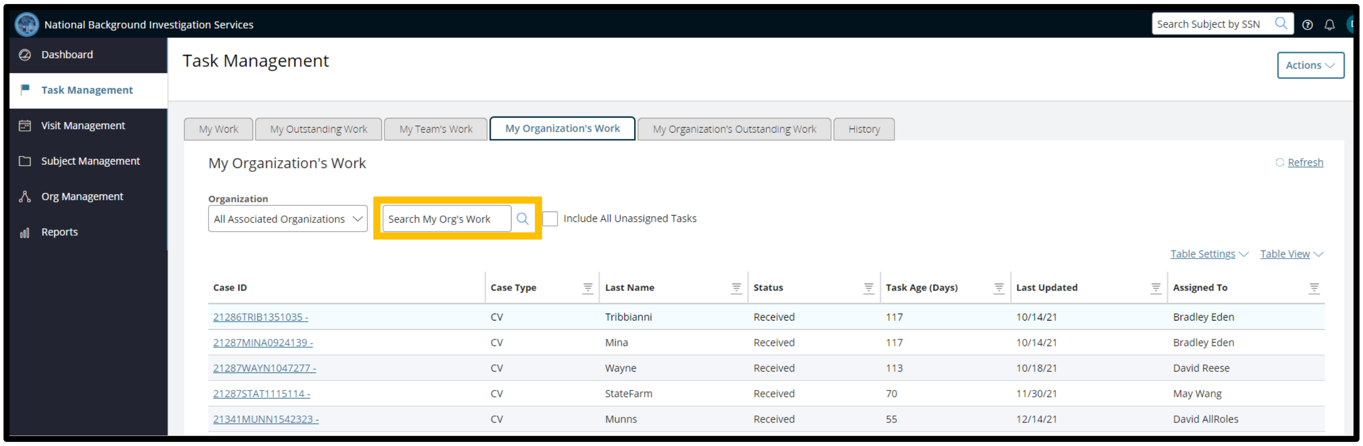
How to Search for a Task from Task Management

1. Select **Task Management** from the Left Navigation Menu to navigate to the Task inbox.

   Note: The tabs available to the user are dependent on the user roles granted to them. Search for assigned tasks under the My Work tab and unassigned tasks under the My Organization's Work tab.



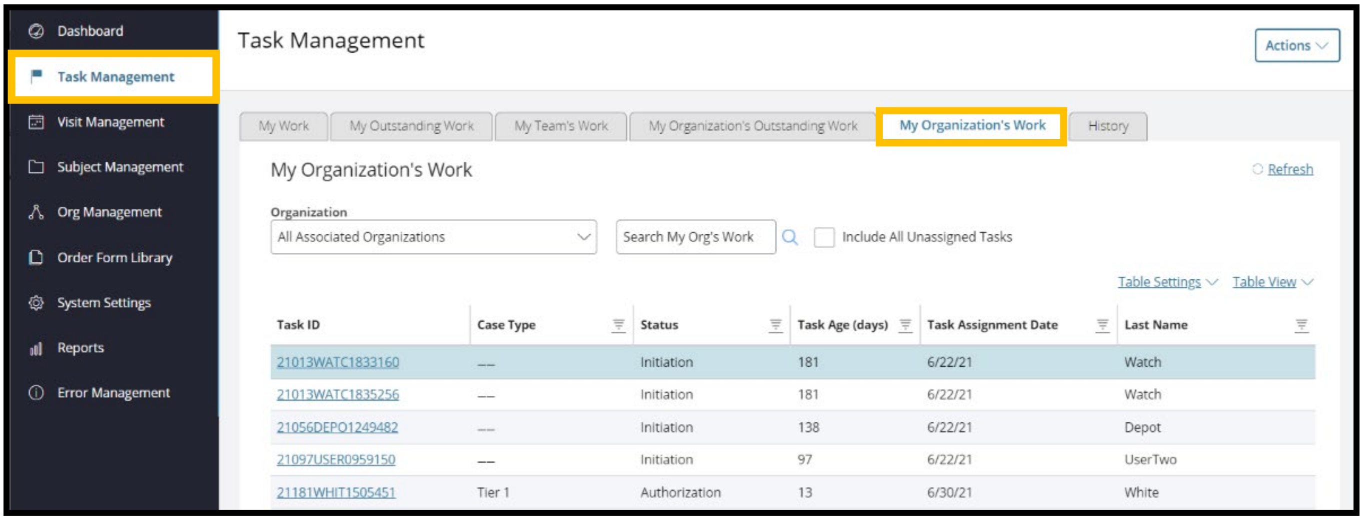
2. Enter the subject's last name or Social Security number in the Search box.
3. Select the **magnifying glass** to execute the search.



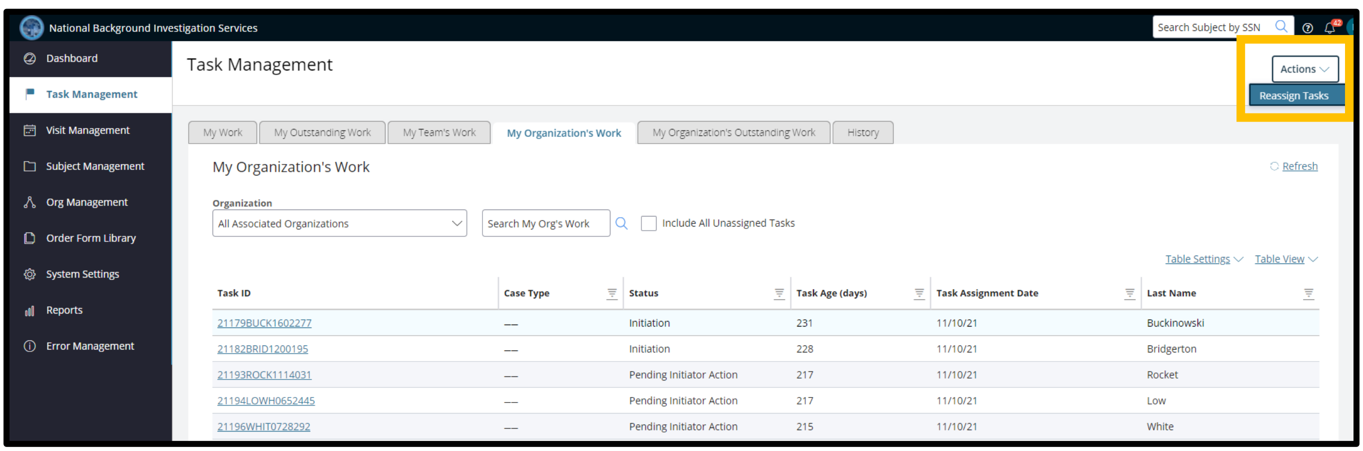
Note: The My Organization's Work tab has the option to Include All Unassigned Tasks and the My Team's Work tab has the option to Include All Sub-Teams in the results. Ensure to check the box prior to searching to include these items.

Review: How to Reassign a Task from the Task Management Page

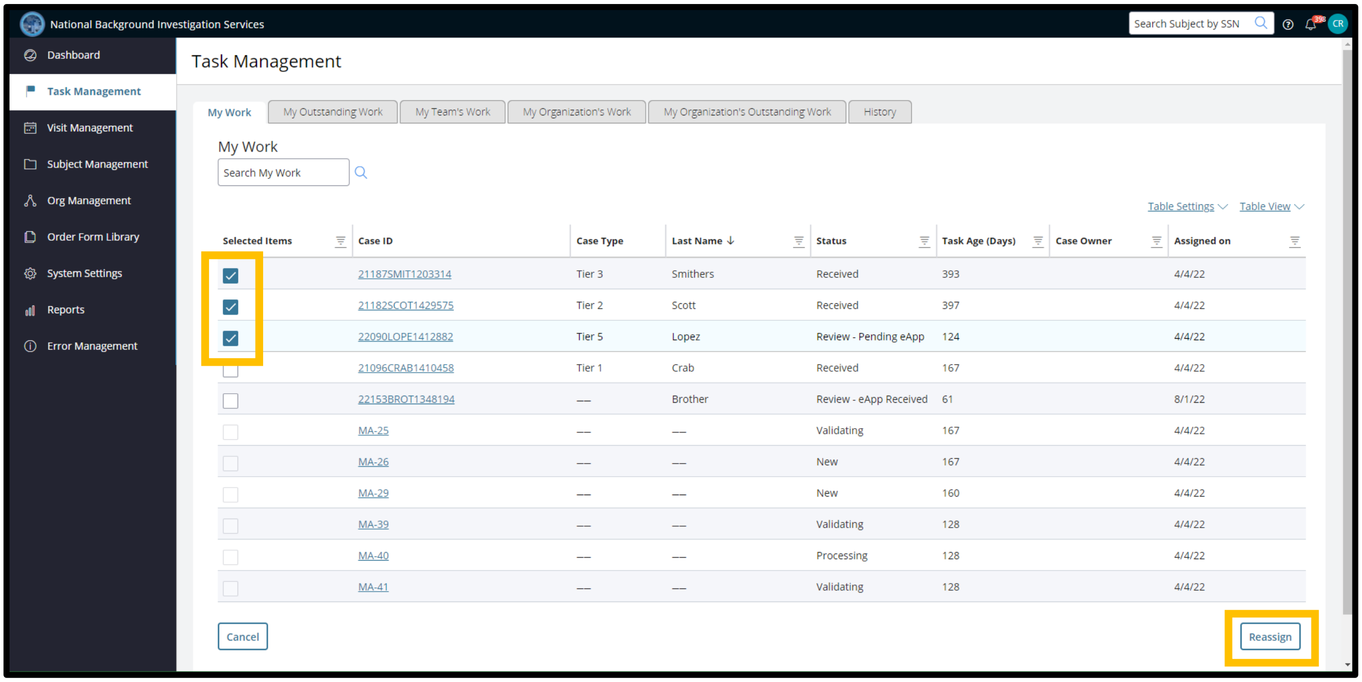
1. Navigate to the **Task Management** page from the Left Navigation Menu.
2. Select the **My Organization's Work** tab to locate the required task(s) to reassign.



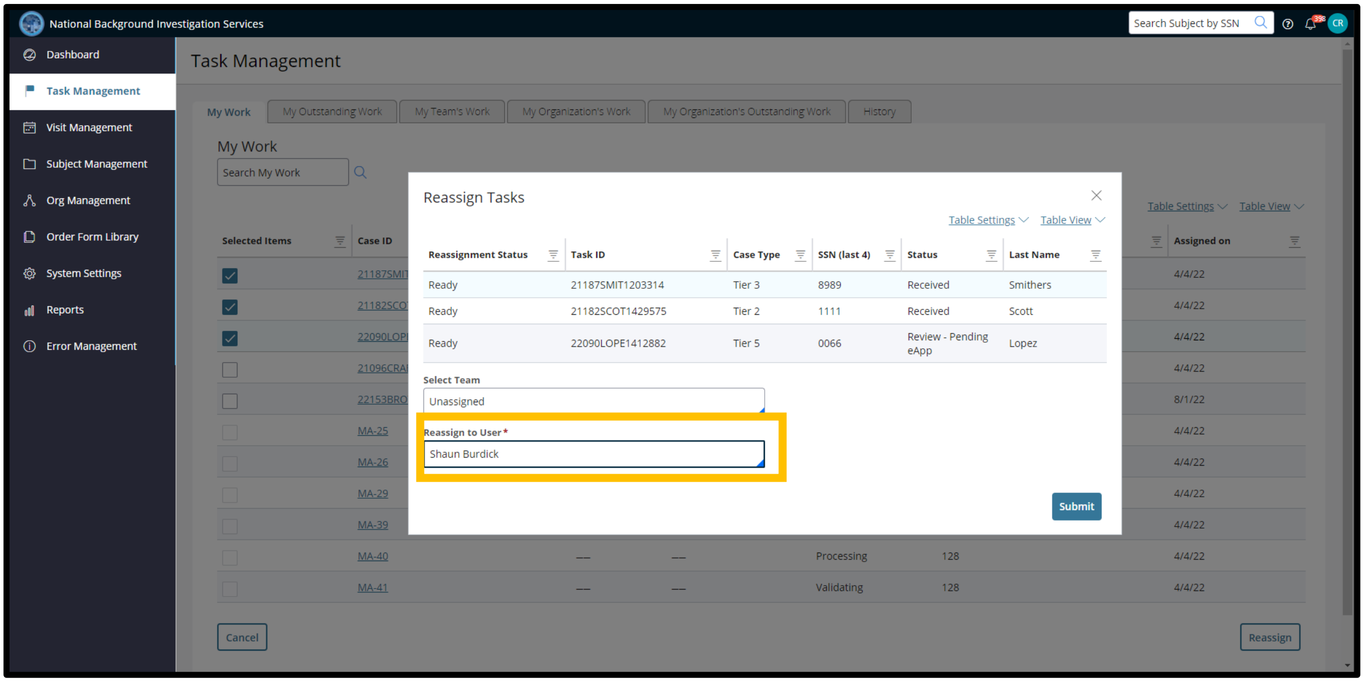
3. From the Actions drop-down, select **Reassign Task.**



4. Check the box for the corresponding task(s) to reassign, then select **Reassign** at the bottom right of the screen.



5. When the Reassign Tasks modal appears, enter the name of the user to receive the case in the Reassign to User box.
6. Select the name when it appears, then select **Submit**.



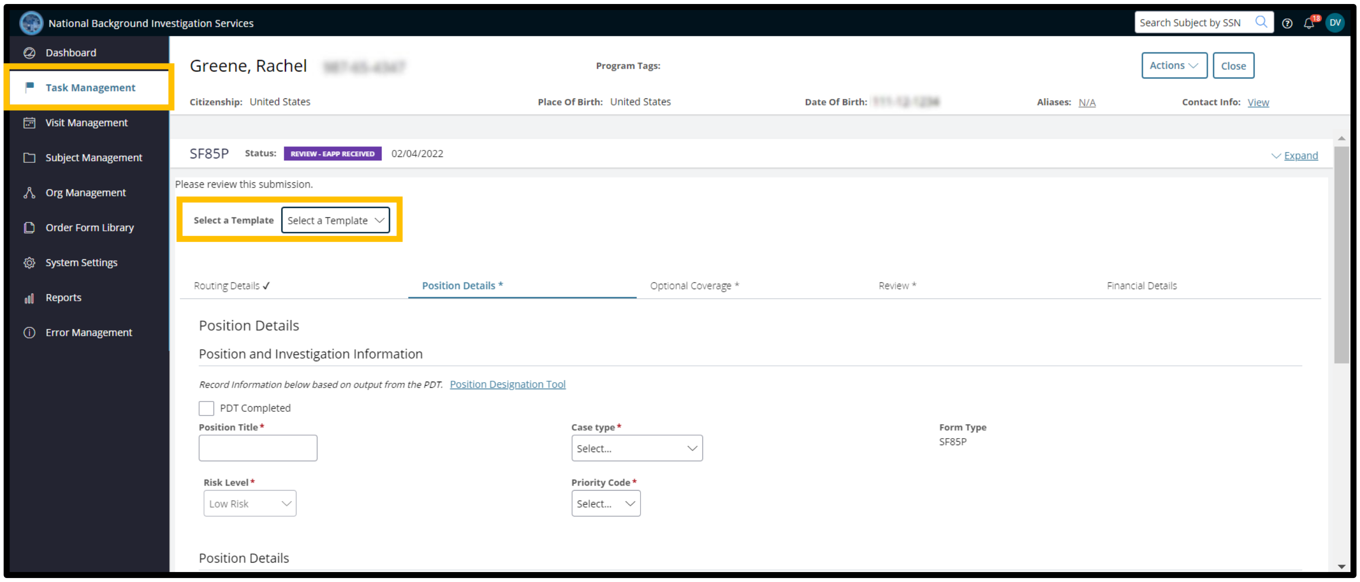
7. The task will now be available to the user who received the task in their My Work tab.

Note: This process can be completed in any tab available to the user within Task Management.

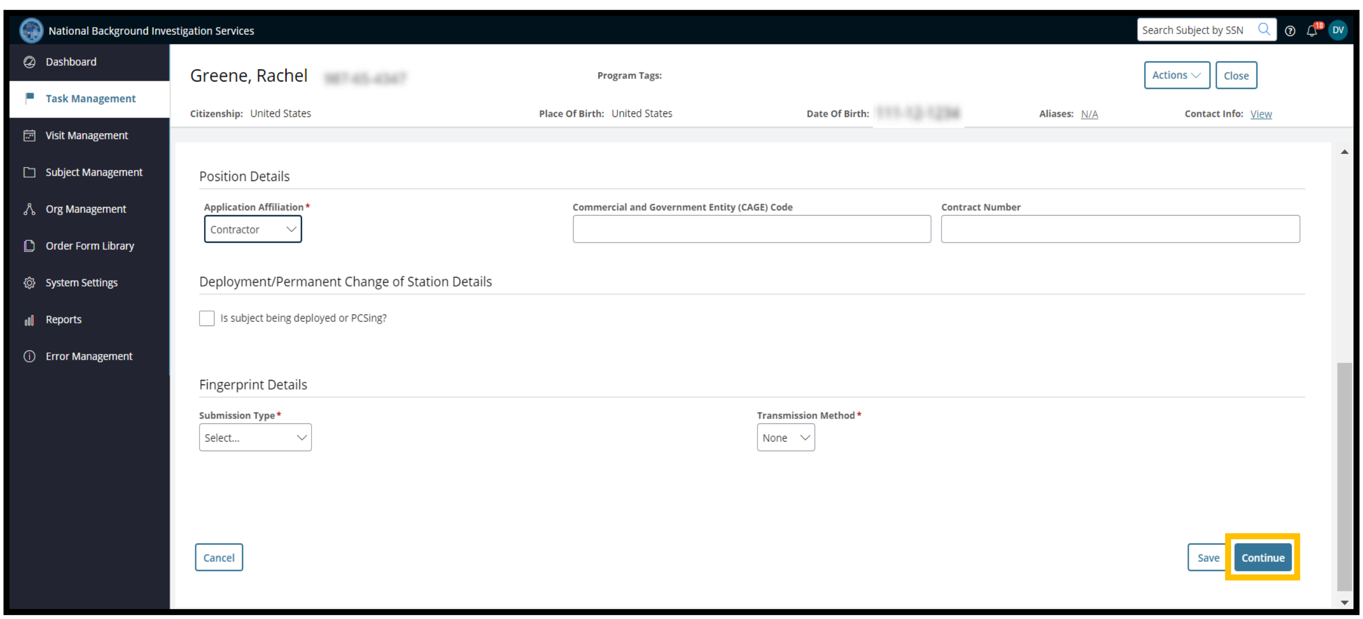
Review: Review the Submission Details

The Review phase begins on the Position Details tab. The details from the Routing Details tab from the Initiation phase are available in read-only view.

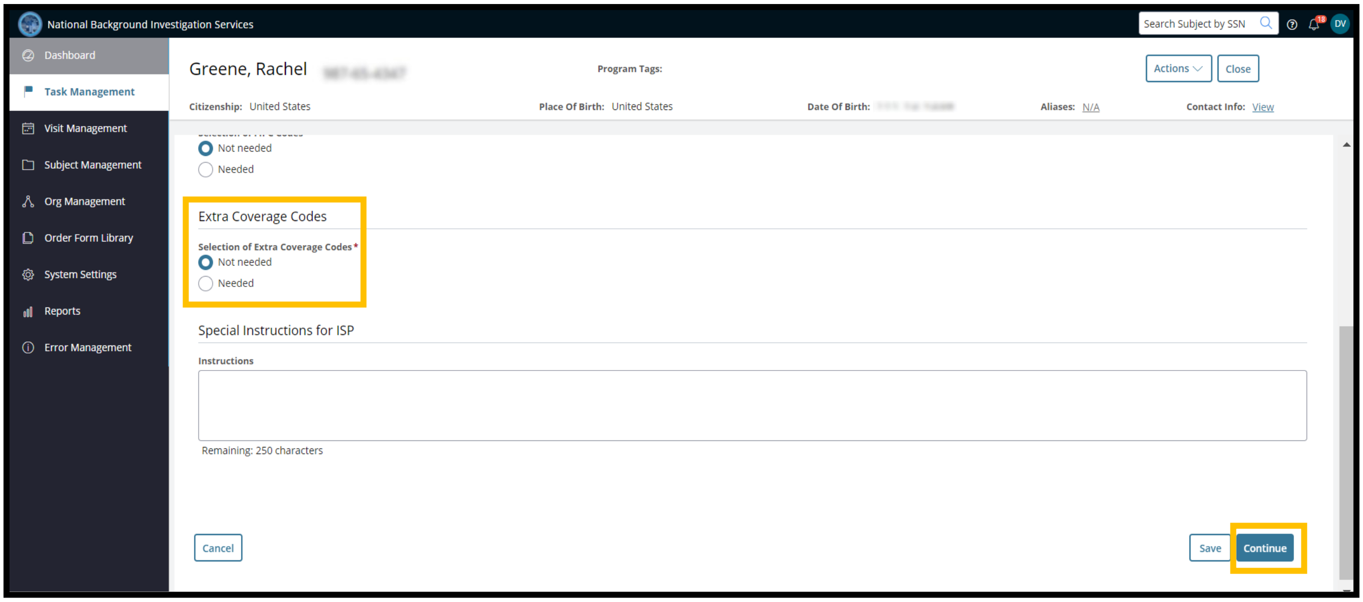
1. On the Position Details tab, the user can choose an order form template from the **Select a Template** drop-down menu to pre-populate required fields or manually complete all necessary information if no template is available.



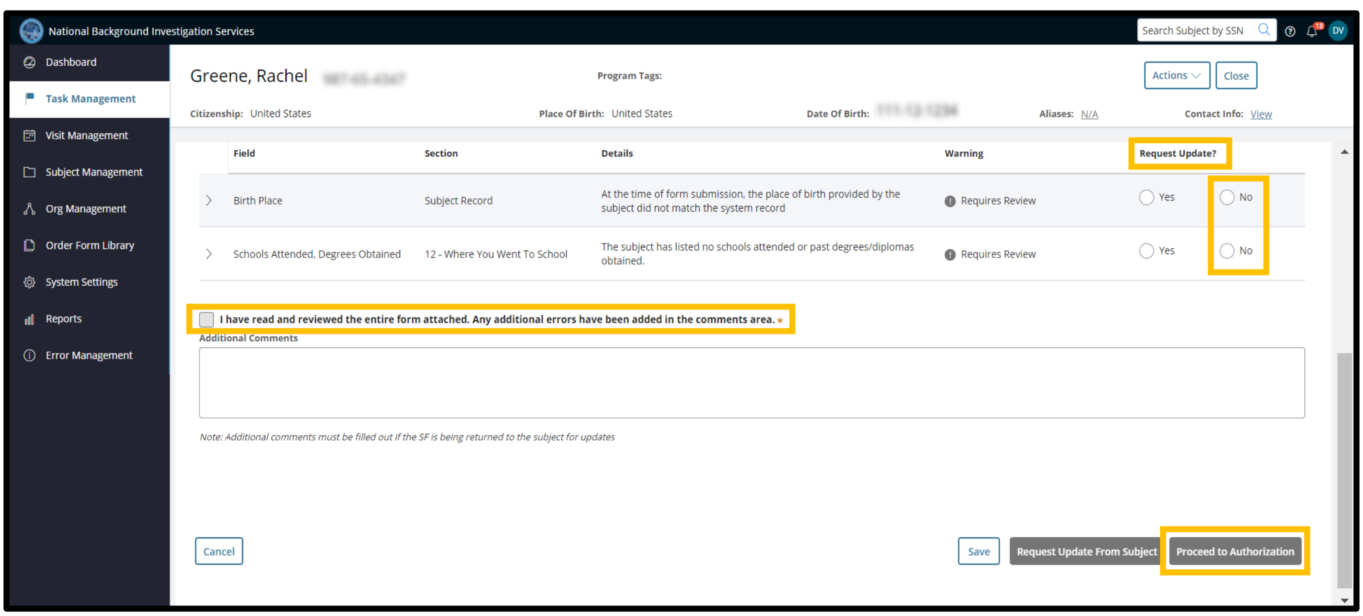
2. Ensure all information is accurate and complete. Select **Continue** when done.
Note: Changes made to the request will not change the adopted template.



3. Under Optional Coverage, select options for **Extra Coverage Codes**. Once complete, select **Continue**.

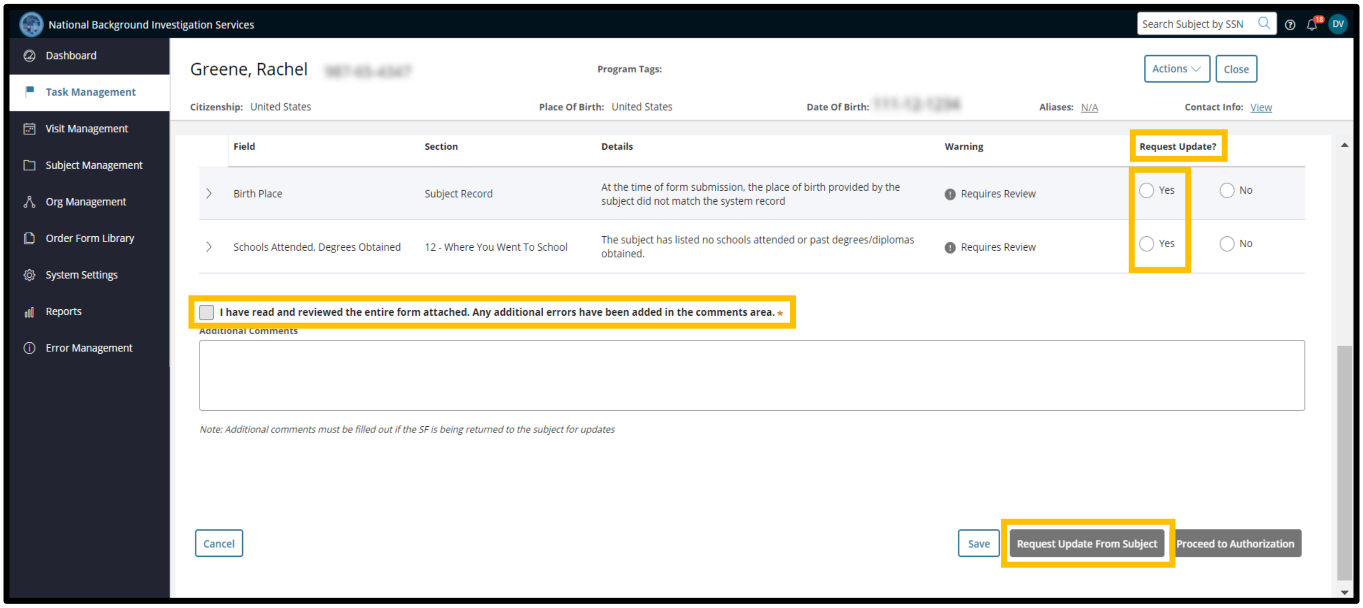


4. The Review tab displays inconsistencies identified in the subject's e-App submission that require review and potential correction. For different non-critical errors, the Reviewer can choose to accept an error or request an update.
   a. To accept an error, select the **No** radio button in the Request Update column and enter any appropriate comments in the Reviewer Comments free-text field.
   b. Select the checkbox next to the "**I have read…**" affirmation, provide any additional comments, and select **Proceed to Authorization**.



c. If updates are required from the subject, select the **Yes** radio button.

d. Select the checkbox next to the "**I have read…**" affirmation, provide any additional comments, and select **Request Update from Subject**.



e. As a result, an automated email will be sent to the subject, instructing the subject to log into e-App to provide the requested revisions and/or additional information. The items will be listed in the email under the titles of Form Section and Warnings. After the subject has made the revisions and/or provided additional information, they will need to resubmit to the agency. Steps above are repeatable until no additional corrections from the subject are required.

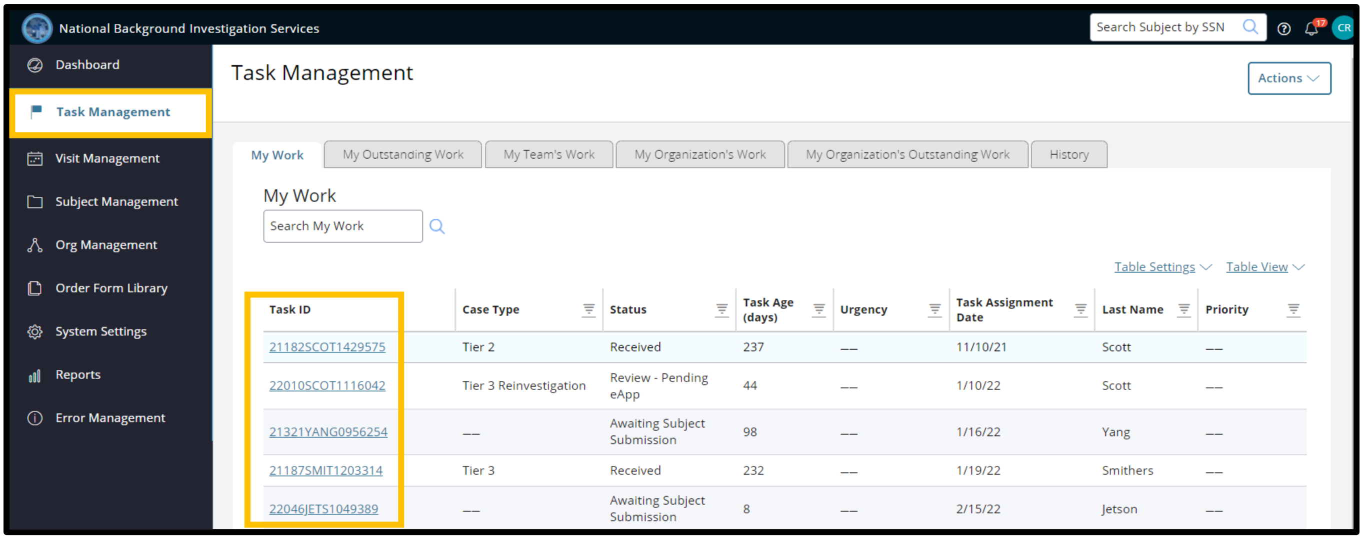
Note: Before sending an email to the subject, the user can review the email via Email Preview.

5. Once the review is complete, the case is routed for Authorization**.**

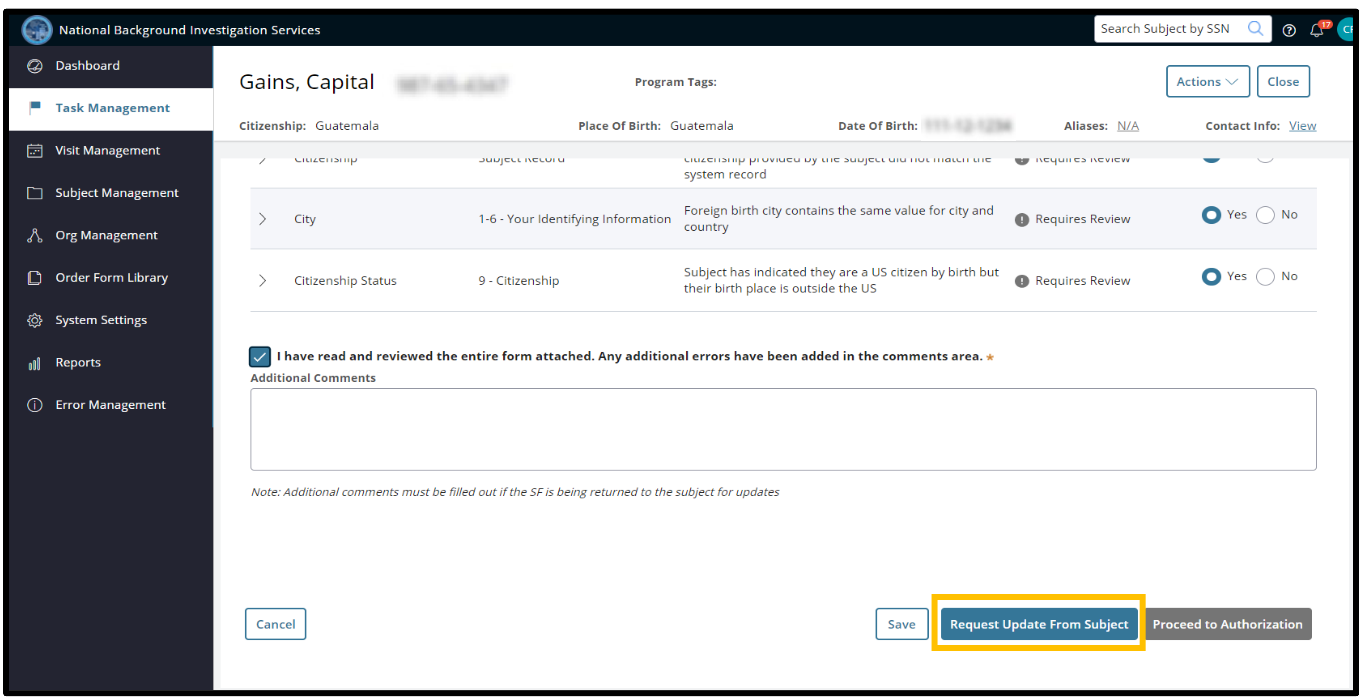
Note: If the user's organization cannot authorize case requests, the case will move to the authorizing organization. If the user cannot authorize case requests, the case will move to the My Organization's Work tab under Task Management.

How to Request a Submission

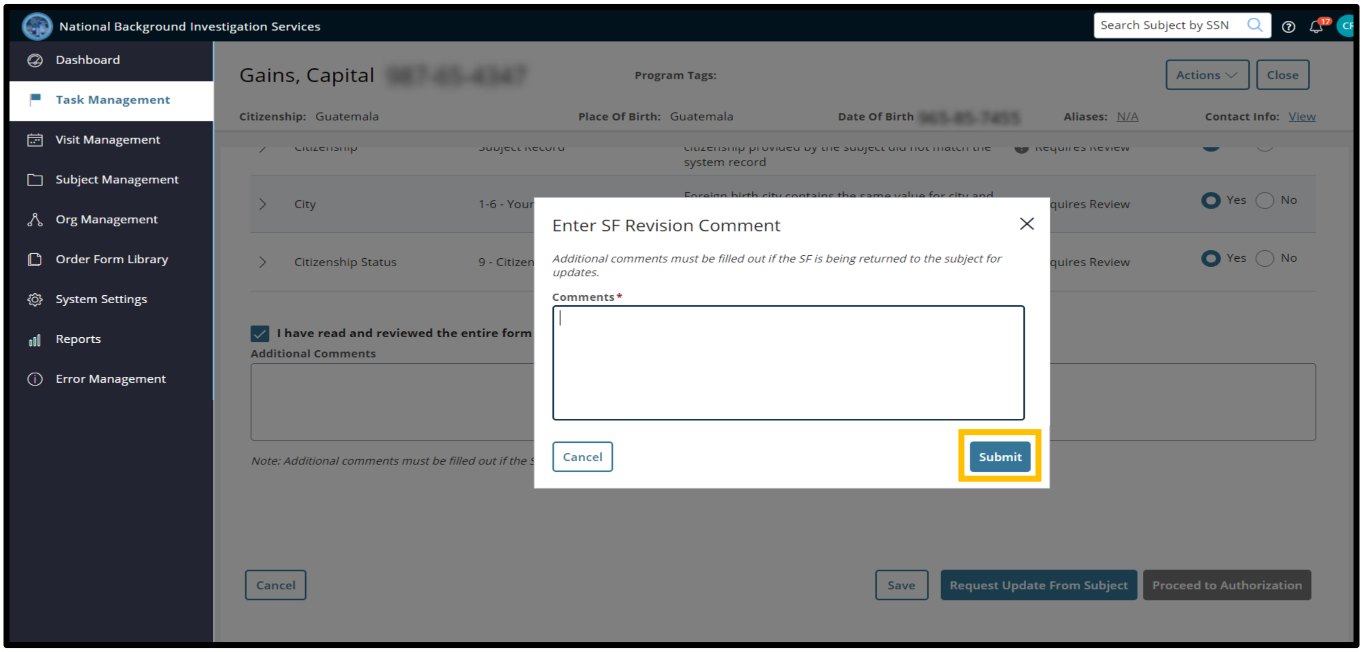
1. From the Left Navigation Menu, select **Task Management**.
2. Select the desired **hyperlink** from the Task ID column.



3. From the bottom of the Review tab, select **Request Update from Subject**.



4. Enter additional comments in the provided text field and select **Submit**. This will lead to the Request Submission page.



5. Select the **"Would you like to send an email to the subject?"** checkbox to send the request to the subject's email. If selected, the template of the email appears in the Email Preview box and can be edited.
6. Select **Continue** to send the request.