EDD Staff Legislative Service Tracker

Version 0.01

10/16/2020

Employment Development Department

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1.1 COPYRIGHT

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2. Revision History

Date	Version	Author	Documentation Changes
9/22/2020	V 0.01	Stephen Mitchell	Initial Draft
Date			
Date			
Date			

Table 1: Revision History

3. Approvals

Role	Name	Title	Signature	Date
Project Sponsor:				
Project Manager:				
System Implementation:				
Content Lead:	Stephen Mitchell	Sr. Technical Writer	SWM	9/22/2020

Table 2: Approvals

4. Points of Contact

Name	Title	Email	Contact Number
Stephen Mitchell	Sr. Technical Writer		207.210.8750

Table 3: Points of Contact

4.1 Information Technology Service Desk

In the event of a question about the operation of the systems, users should contact the Office of Information Technology Service Desk at +1 (210) 404-7676, or via Email: ITServiceDesk@xyz.com

5. Related Documents

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10. Registering for the EDD Staff Legislative Service Tracker Process

The steps below will guide you through the process of registering yourself as a user of the **EDD Agent Legislative Service Request** software, and authorizing you to use the software's various features to create, edit, and track legislative continents and their cases.

10.1 Sign-up

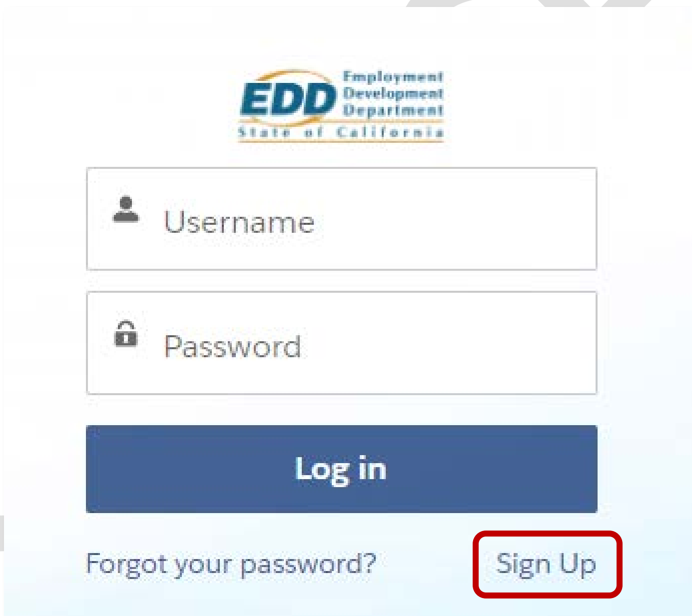


Figure 1: Sign-up Dialog

If you have already completed and been approved for registration in the **Legislative Service Tracker**, enter your **User Name** (Email Address) and **Password**. If you are not a registered user, follow the actions below to register.

1. To begin the initial registration process, click the **Sign-up** button, shown in **Figure 1**: Sign-up Dialogabove.

10.2 Registration

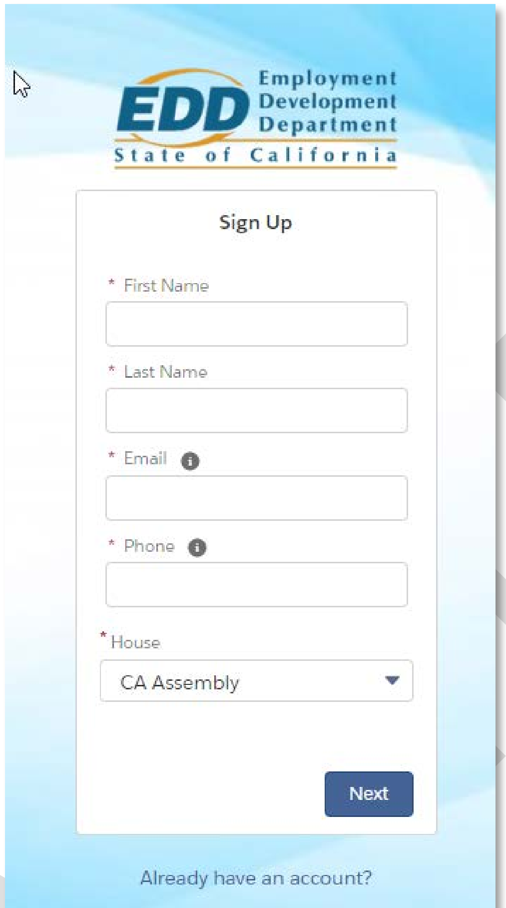


Figure 2: Sign-up Dialog

The **Sign-Up** screen in **Figure 2**: above is displayed.

2. In the **First Name** field, enter your first name.
3. In the **Last Name** field, enter your last name.
4. In the **Email field**, enter your email **.gov** email address

Note

A validation rule permits you only to use your government-issued email address and must contain your government email extension (**.Gov).** Any other email address will throw an **Invalid Email** error.

5. In the **Phone Number** field, enter your phone number.

Note

A validation rule permits you only to use your assigned phone number. Any other telephone number will throw an **Invalid Telephone** error.

The **House** drop-down field displays the following values from which to select your choice of the legislative branch for which you work.

- CA Assembly
- CC Lt. Governor's Office
- CA Senate
- CA Treasurer
- US Congress
- US House
- US Senate

See Figure 3 below.

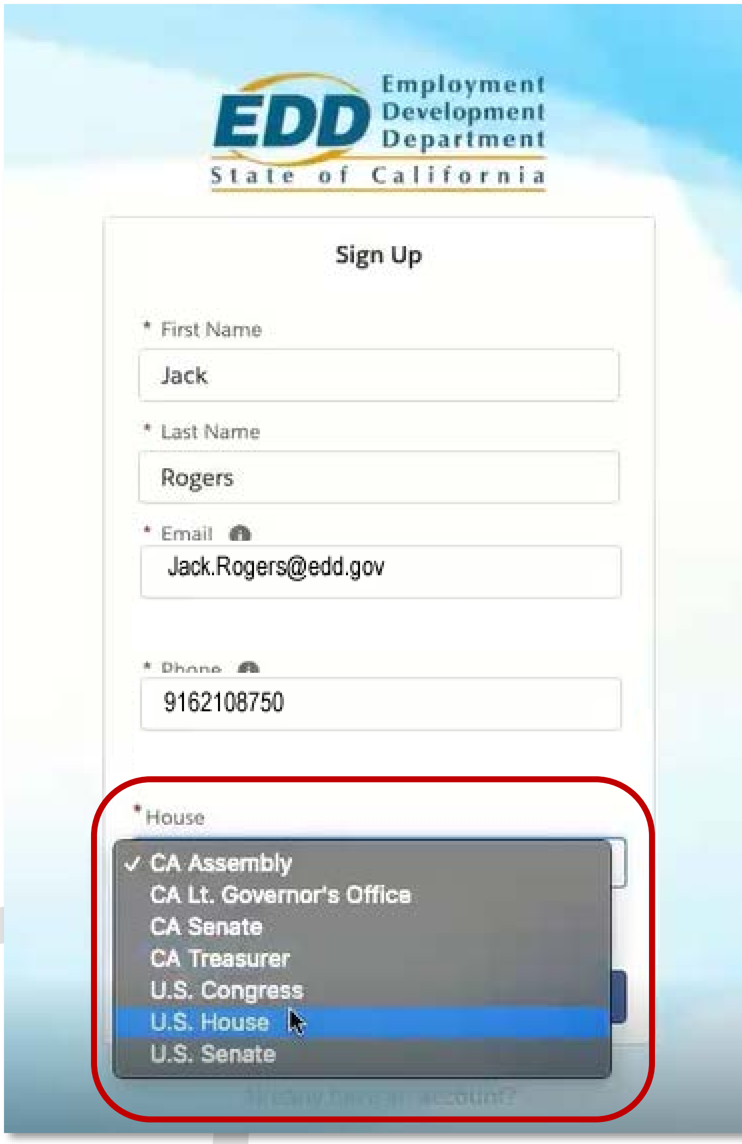


Figure 3: Legislative House Drop-down

6. In the **House** field, choose the legislation branch for which you want to accept **Service Requests**.

After selecting the **House** drop-down value, you will then choose which representative you wish to associate with.

Figure 4: Legislative Office Drop-down

Another example is selecting the **CA Assembly** from the **House** drop-down, as in [Figure 5](#): below.

Figure 5: California Assembly Drop-down

For the purpose of this demonstration, we will select the **US Senate** from the **House** drop-down on the **Sign-up** screen shown in Figure 2: above.

Figure 6: US Senate Drop-down

7. Select the **Senator** from the **Legislative Office** drop-down, then click **Next**.

Once the **Sign-up** procedure is completed, the **Success** splash screen is displayed.

Figure 7: Sign-up Success Splash Screen

8. Click **Finish**.

10.3 Registration Received

You will receive an email from the office of the **Legislative and Intergovernmental Affairs Office**, letting you know that your registration has been received and that an update will be provided when the registration has been approved.

A subset of the **EDD Agents** known as the **Approval** queue will be allowed to see, review, and verify the Registration Request's accuracy**.** They will either **Approve** or **Reject** the registration.

See **Figure 8:** Email, Confirming Receipt of Registration below.

Figure 8: Email, Confirming Receipt of Registration

Once the registration has been approved, you will receive another email from the **Legislative and Intergovernmental Affairs Office** indicating your registration is approved, as shown in **Figure 9**: Email, Approved Registration below.

10.4 Registration Approved

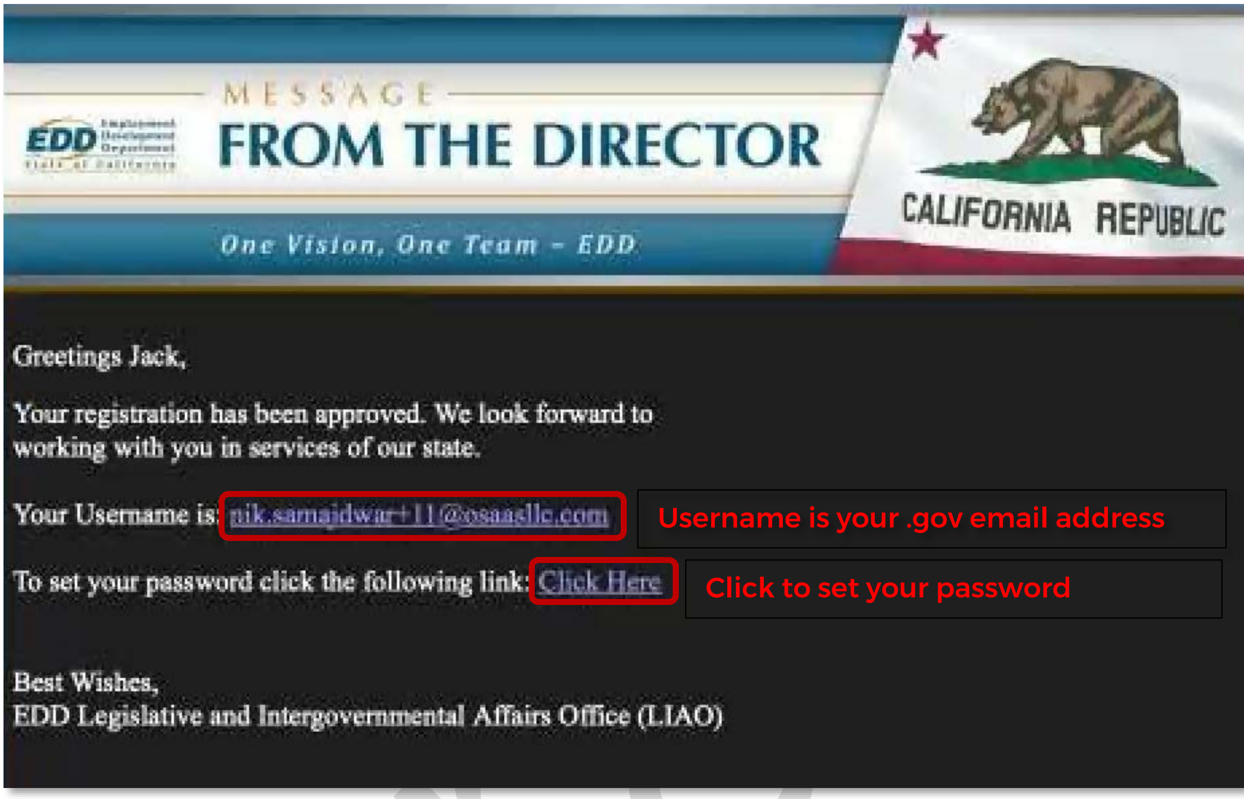


Figure 9: Email, Approved Registration

The email provides you with your **Username** and a link to set your **Password**, as shown in **Error! Reference source not found.**above. This action will direct you to the **Change Password** dialog as seen in **Figure 10**: Change Password Dialog below.

1. To set your password, click the **Password** link contained in the email.

10.5 Set Password

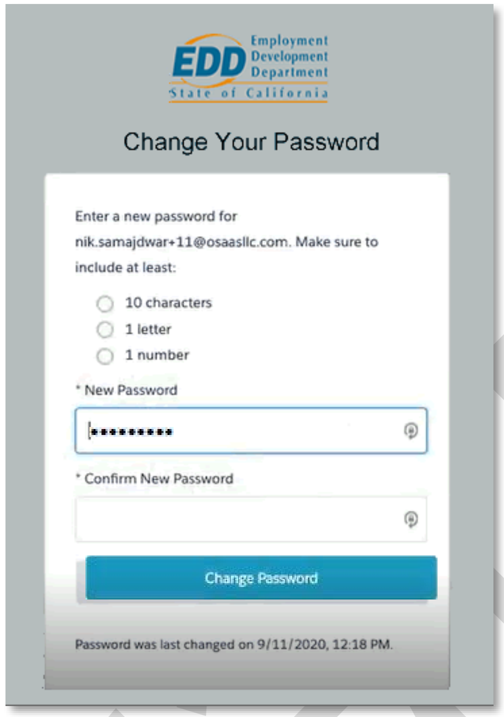


Figure 10: Change Password Dialog

A word about **Password** nomenclature:

- The **Password** must be ten alphanumeric characters
- It must contain at least one letter
- It must include at least one number

As always, the password should be strong. While there are many methods for creating strong passwords, the **Sentence Method** will produce a nearly uncrackable password.

Sentence Method:

The idea is to think of a random sentence and transform it into a password using a rule. For example, taking the first two letters of every word in "**The Old Duke is my favorite pub in Southern California**" would give you: **ThOlDuismyFaPuinSoCa**. Then insert or append a number. So, the password becomes **ThOlDuismyFaPuinSoCa01**. Is that easy to remember?

1. In the **New Password** field, enter your password.
2. In the **Confirm New Password** field, reenter your password. If your password adheres to the **Password** rules, each criterion in the **Set Password Dialog** will illuminate as in **Figure 11** below.

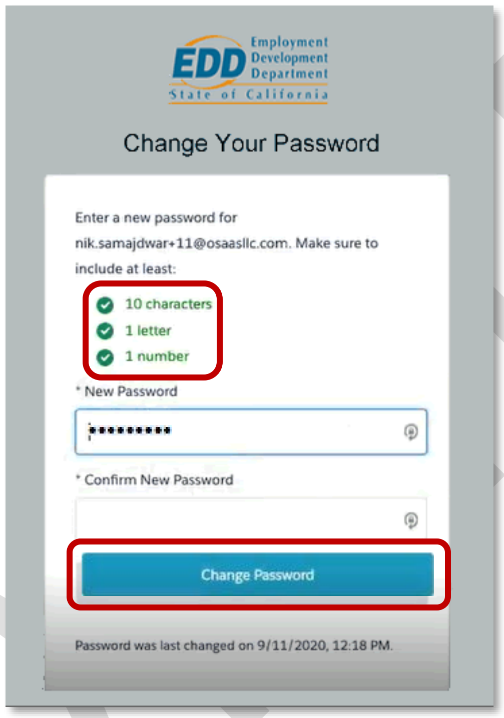


Figure 11: Change Password Dialog

3. To set your password, click the **Change Password** button.

10.6 Landing Page

You have now successfully registered, set your password, and logged in to the **Agent Legislative Service Tracker**. After logging in, you will be directed to the **Landing p**age, as seen in **Figure 12** below.

Figure 12: Landing Page

10.7 Log Out of the EDD Legislative Service Tracker

1. When your session is complete, you will log out of the system.
2. Click the **Log Out** button, as shown in **Figure 12**: above.
3. You will be redirected to the **Log In** dialog, as shown in **Figure 13**:: Login Dialog below.
4. In the event you do not log out, after two hours of inactivity, the system will time out, as shown in **Figure 14** below.

10.8 Log In to the Legislative Service Tracker

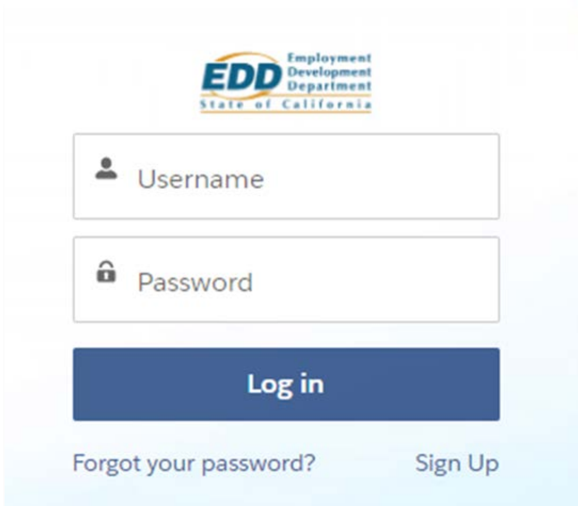


Figure 13:: Login Dialog

1. Enter your username **.gov** email address.
2. Enter your password.
3. Click the Log in button.
4. You will be redirected to the **Landing** page, as seen in **Figure 12**: above.

10.9 Login from Inactivity Login Dialog

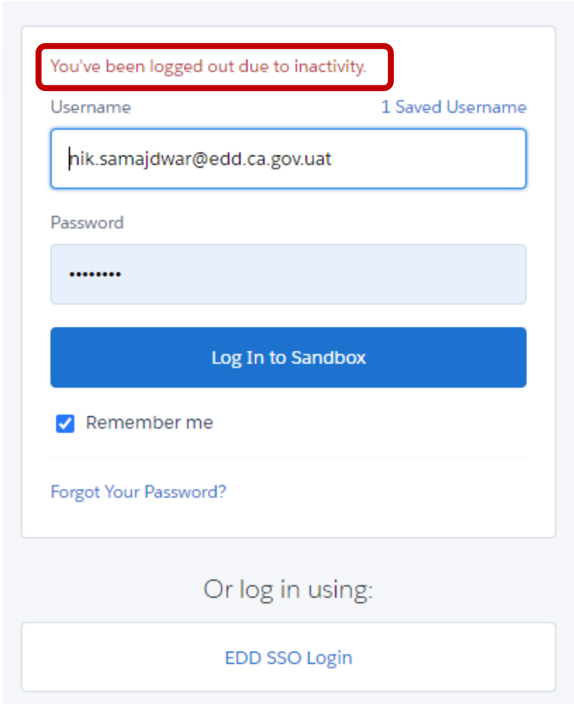


Figure 14: Log out Due to Inactivity

The image above displays the **Log in Dialog** after a previous session was timed out due to inactivity.

1. Enter your username **.gov** email address.
2. Enter your password.
3. Click the **Log in** button.

You will be redirected to the **Landing** page, as seen in **Figure 15**: Landing Page

11. Landing Page Nomenclature

11.1 Landing Page

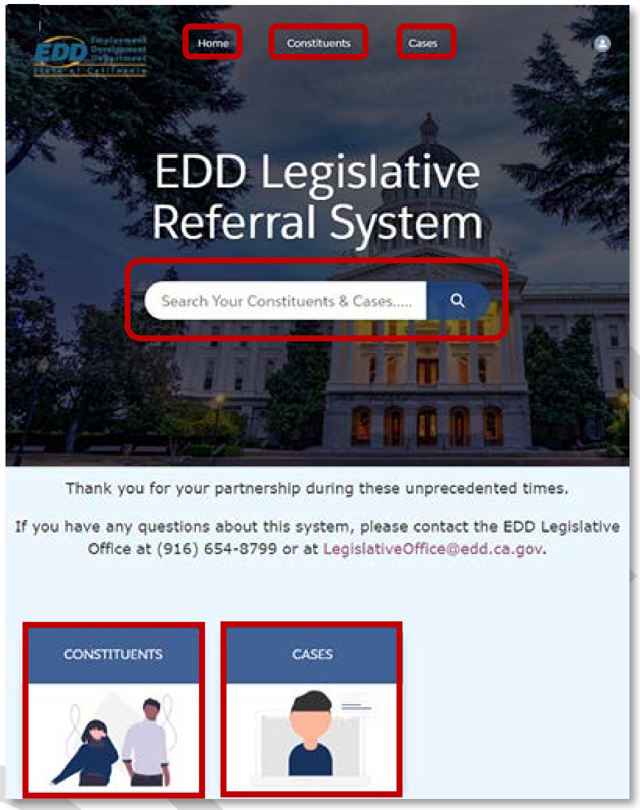


Figure 15: Landing Page

Once you have logged in to the **Service Tracker**, you are directed to the **Landing** page shown in **Figure 15** above.

The **Landing** page presents four different functions from which you can choose to continue your work as follows:

- **Home** – Directs you to the **Landing** page. See also:
- **Constituents** – Directs you to the **Constituents** list page.
- **Cases** – Directs you to the **Case** list page.
- **Search Bar** –Directs you to the **Landing** page, where using the **Search** bar, you can navigate to either Constituents or Cases.

12. Understanding the Landing Page

12.1 Hyperlinks

The **Hyperlinks** in the **Service Tracker** are shortcuts that lead to another function, feature, or other objects within the **Staff Legislative Service Tracker**. They are highlighted in the image below.

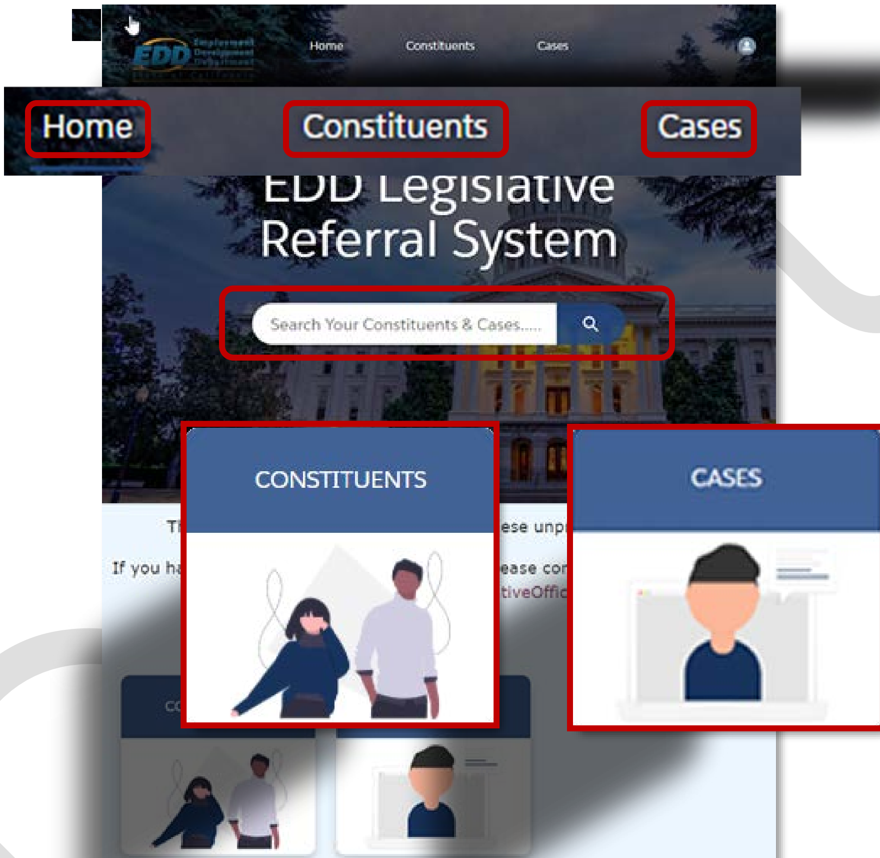


Figure 16: Landing Page Hyperlinks

12.2 Landing Page Hyperlinks

- **Home** – This directs you to the **Landing** page shown in [Figure 15:](#) Landing Pageabove.
- **Constituents** – This leads you to the **Constituents** list page where you can create new Constituents, edit, and update the Constituent. See also: [Constituency Page Nomenclature](#).
- **Cases** – This directs you to the **Cases** list page, where you can view, edit, or create new cases. See also: [16](#).
- **Constituents Icons** – The icons at the bottom of the page also direct you to the **Constituents** list or **Cases** list page.

- **Search** bar – This tool lets you search by and display specific Constituents or Cases.

12.3 Search Bar

Figure 17: Search Bar

The **Search Bar** allows you to search for your constituents or cases.

For instance, if you enter a constituent's last name, in this case, "**Mitchell**," the **Search** bar displays all of the constituents with the last name of "**Mitchell**" as depicted in the image below.

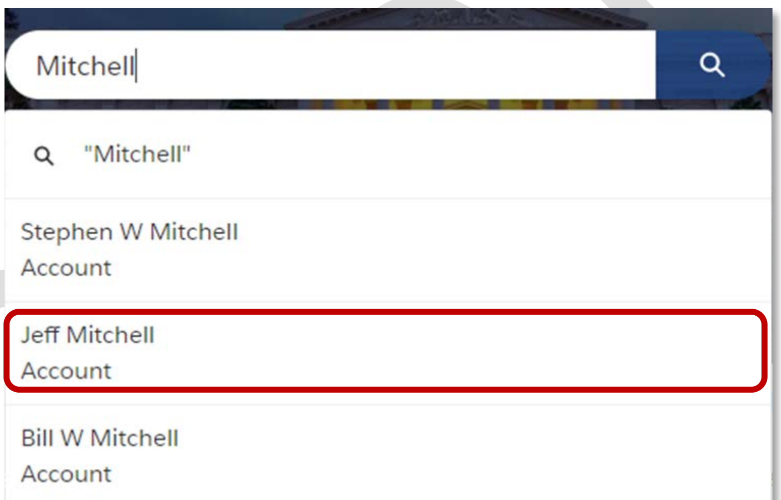


Figure 18: Search Bar Results

Clicking on the **Account Name,** you desire to work on, in this case, "**Jeff Mitchell**," you will be directed to Jeff Mitchell's constituent **Account** page, as shown in Figure 19: Constituent Results: Account Pagebelow. This area is where you will edit and update the account and the cases associated with the account.

Similarly, entering a **Case** "category" or **Sub Category**, **Keyword**, or **Status** in the **Search** bar will return a list of search results equal to the **Case** category you entered. In this case, the category "**Unemployment Insurance"** is returned on the **Case** list page. See Figure 20 below.

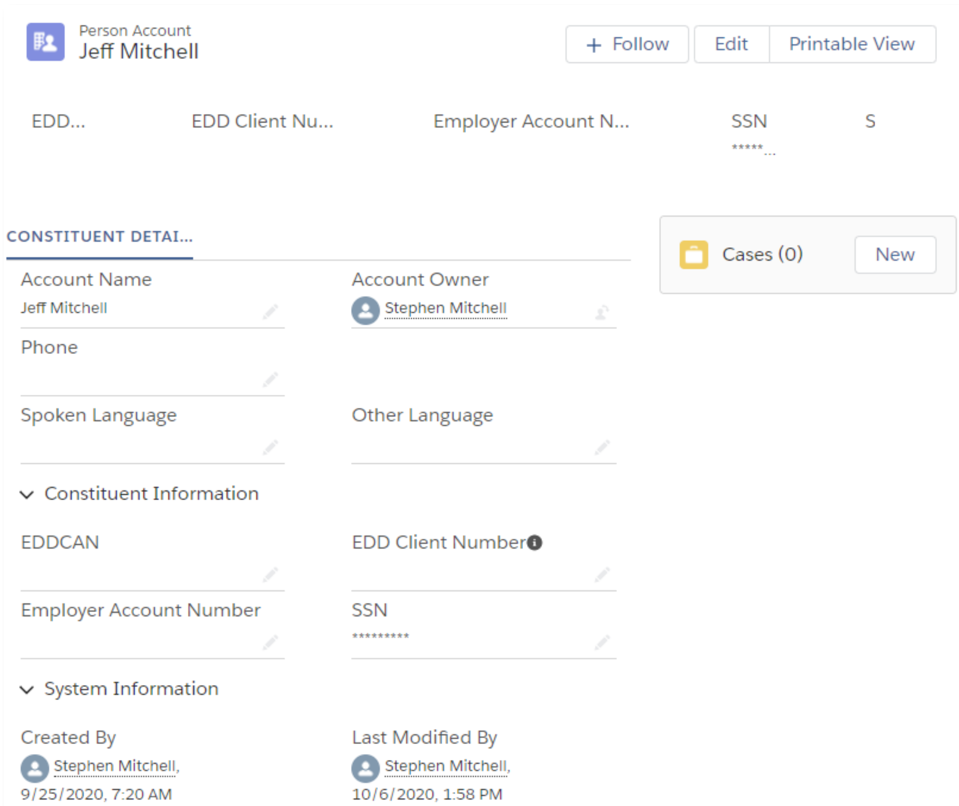


Figure 19: Constituent Results: Account Page

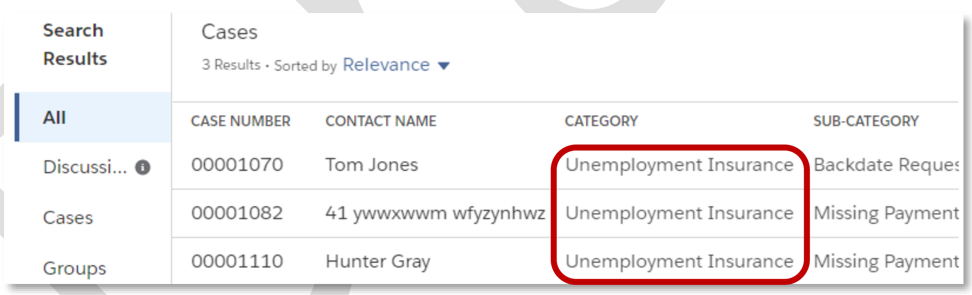


Figure 20: Case Results Page

13. Constituency Page Nomenclature

13.1 Understanding the Constituent Page

The **Constituent** page where you are directed to by clicking the **Constituents** link from the **Landing** page is the area where you will be able to create, edit, and update your constituents, as shown in Figure 21 **Constituents** page below.

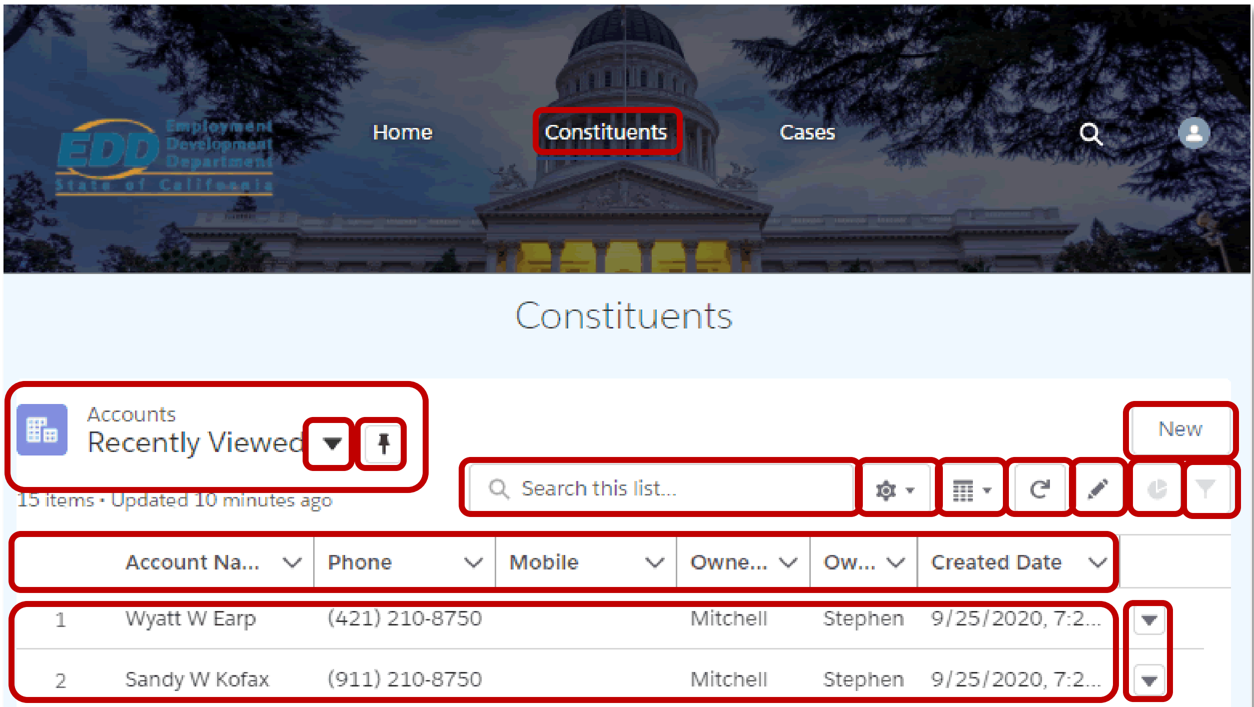


Figure 21: Constituents Page, Recently Viewed

13.2 Accounts Drop-down Control

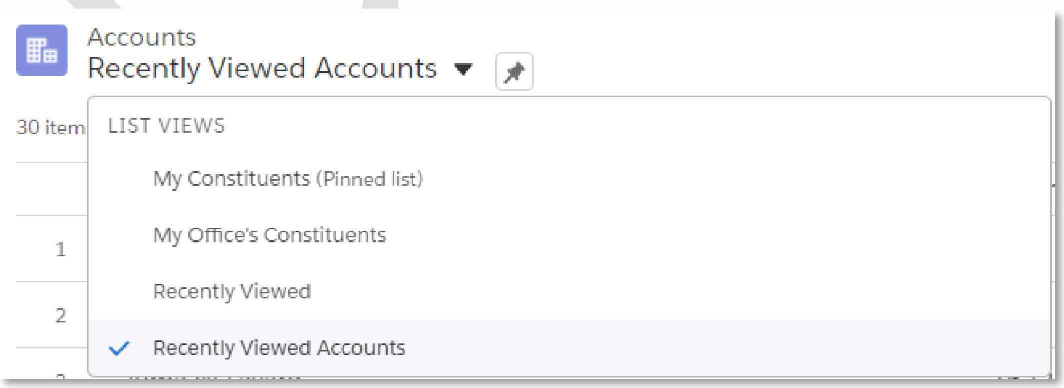


Figure 22: Constituents Account Drop- down

Accounts drop-down – When you navigate to the **Constituents** page, the list of constituents is ordered in the manner in which you last left the order of the list. However, the following views can be displayed by clicking the **Accounts** drop-down, which provides the following views.

- **My Constituents** – Returns all the Constituents that belong to you.
- **My Offices Constituents** – Returns all of the Constituents assigned to your office.
- **Pinned List** – Returns the Constituent list you have pinned
- **Recently Viewed Accounts** – Returns the Constituents you have recently viewed.
- **My Constituents** – Displays the **Constituents** list of the Constituents that belongs to you in alphabetical order by the first name, as shown in Figure 25 below.

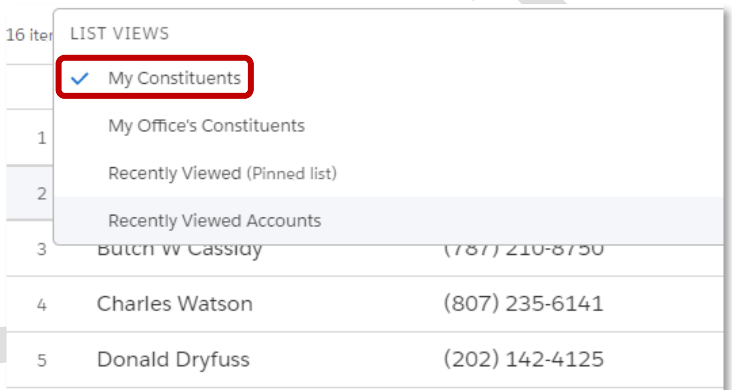


Figure 23: My Constituents List

- My Office's Constituents – Displays the **Constituents** list available to all staff members of your office, as shown in Figure 24 below.

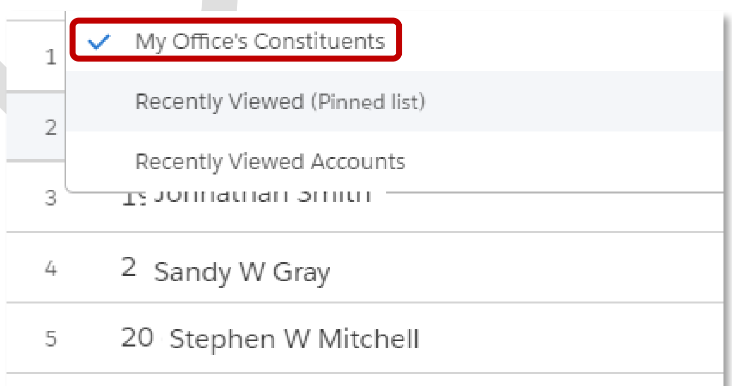


Figure 24: My Office's Constituents List

- **Pinned List** – When you have a listed ordered in the manner you want to work, you can click the **Pinned** button to save the list's order. To view that same list, after you may have chosen to see the list viewed differently, simply select the **Pinned** list you have saved as displayed in Figure 25 below.

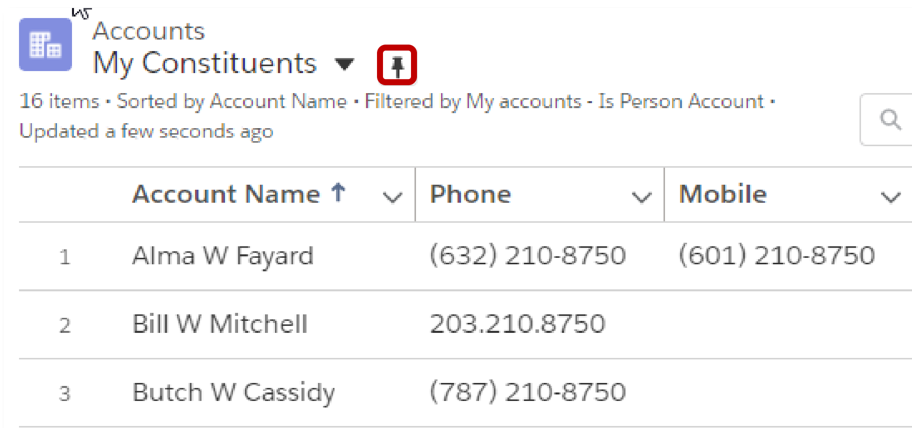


Figure 25: Pin List

- Recently Viewed Accounts – When you are working with several constituents and their cases, the constituents' you were working on will display at the top of the constituents list when you choose the **Recently View Accounts** list, as in Figure 26. below.

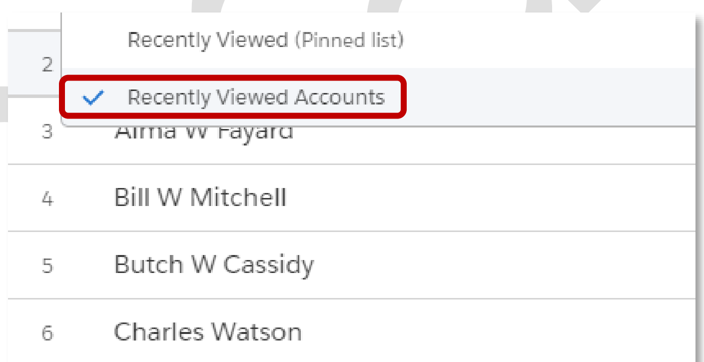


Figure 26: Recently Viewed Account

13.3 Searching the Constituent List

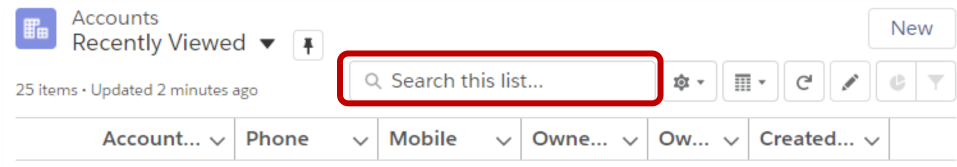
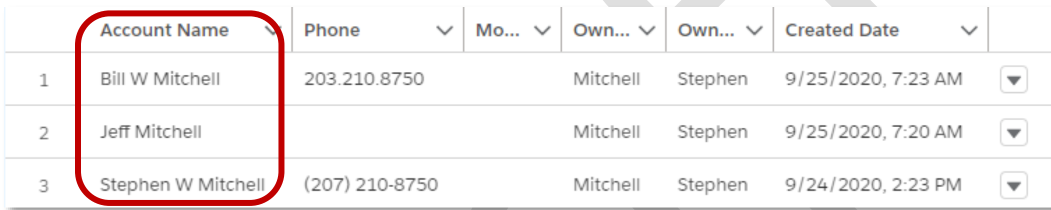


Figure 27: Search this List

Search this list: – Permits you to search for constituents by the **Last Name**. For instance, if you have several constituents with the last name of '**Mitchell**' the effect will be all constituents with the last name of '**Mitchell**' will be returned in the search results as shown in **Figure 28** below.



	Account Name	Phone	Mo...	Own...	Own...	Created Date
1	Bill W Mitchell	203.210.8750		Mitchell	Stephen	9/25/2020, 7:23 AM
2	Jeff Mitchell			Mitchell	Stephen	9/25/2020, 7:20 AM
3	Stephen W Mitchell	(207) 210-8750		Mitchell	Stephen	9/24/2020, 2:23 PM

Figure 28: Constituent Search Results by Last Name

13.4 View List, Display As, Refresh, Inline Edit Controls, Edit List, Show Carts, Filter

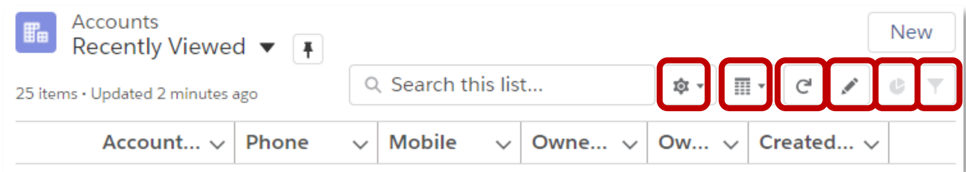


Figure 29: Accounts: Controls

In the **View List** control drop down does not have any functionality at this time.

In the **Display As** control drop-down , provides the option of choosing between **Table** (list) or the **Kanban** view, which is simply a card-style view of the constituents, does not have functionality at this time.

The **Refresh** control simply refreshes the **List** view of the constituents.

The **Inline Edit** control is disabled.

The **Show Charts** control provides for viewing the constituents' list in either a **Verticle Bar**, **Horizontal**, or **Doughnut** chart.

Currently, there is no permission to filter the **Constituent** list with the **Filter** control .

13.5 Constituent List Column Headers

The **Constituent List Column Headers** are as follows:

- Account Name
- Billing State/Province
- Phone
- Type
- Account Owner

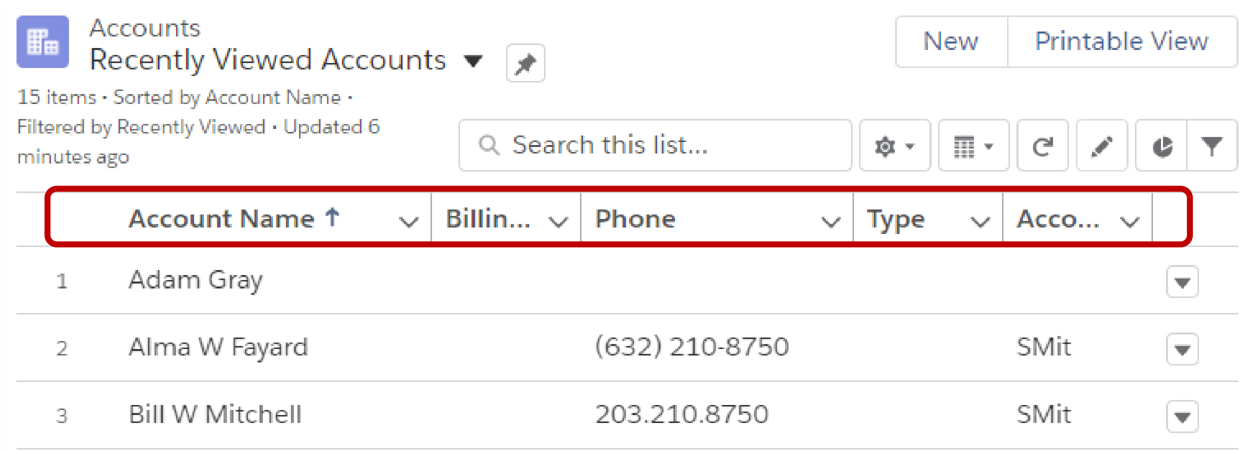


Figure 30: Constituent List View Column Headers

13.6 Sorting Constituent List Column Headers

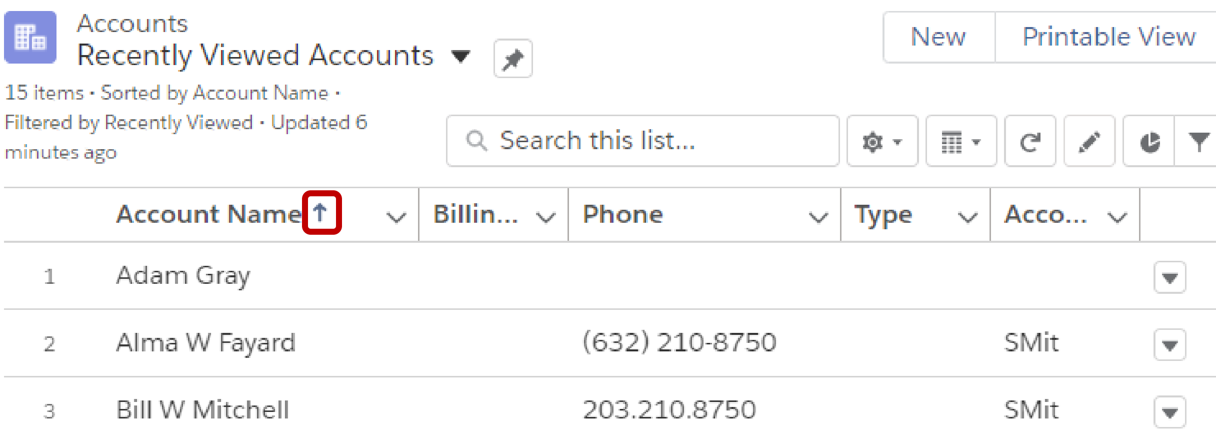


Figure 31: Sort Columns

To sort the rows of **Account Name** in either ascending order Account Name ↑ or descending Account Name ↓ order, click the corresponding **Column Header**. This action can be applied to each column header: **Account Name**, **Billing State/Province**, **Phone**, **Type**, and **Account Owner**.

13.7 New Account: Constituent

Clicking the **New** button on the **Constituents** page, shown in **Figure 32** below, will open up the **New Account: Constituent** page, shown in **Figure 33** below.

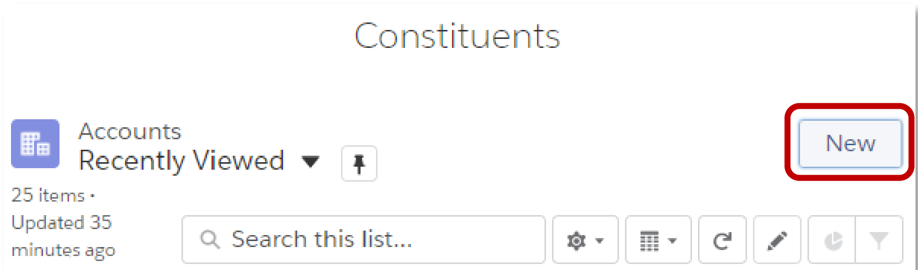


Figure 32: New Constituent

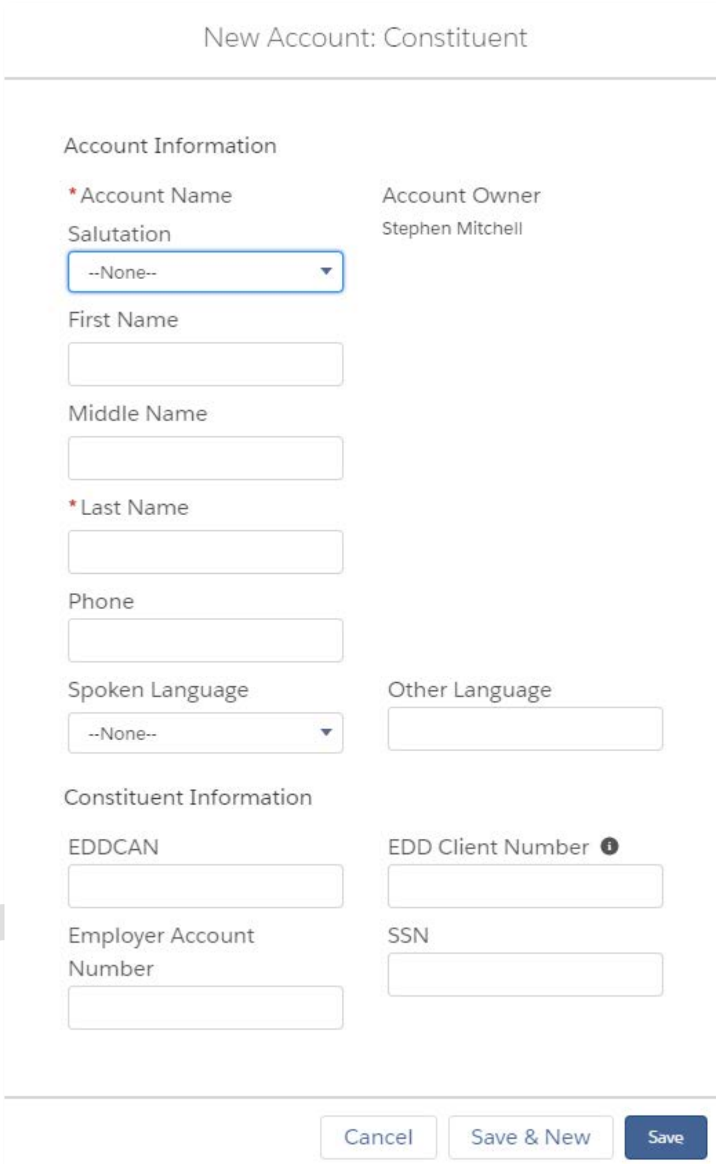


Figure 33: New Constituent Page

Creating a **New** constituent is discussed later in another section of this guide. See also: [15](#).

14. Editing and Updating the Person Account

There are two ways to edit the Constituent from this page. They are using the **Edit Person Account** or the **Inline** editing procedures. We will explain both editing options below.

14.1 Edit and Update Constituent Account

Using the techniques described in 13.2 above, or the **Search** bar, navigate to the Constituent you wish to view, or edit, and update. Select a constituent as follows:

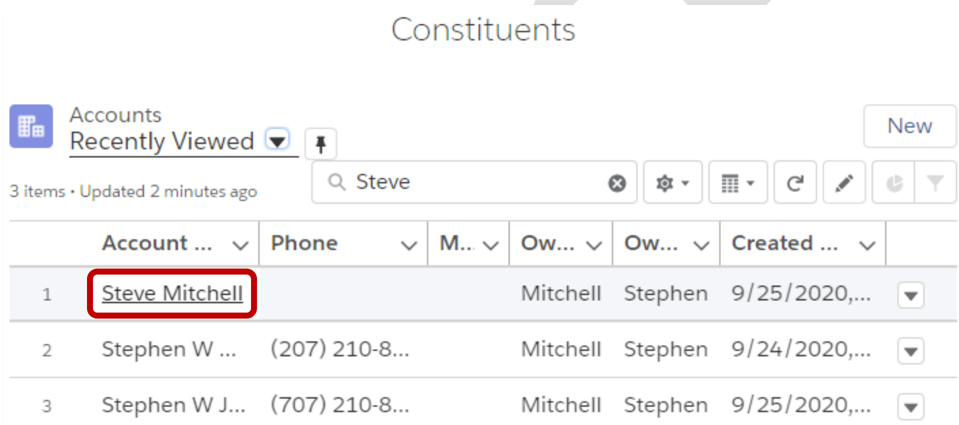


Figure 34: Select Constituent

1. In the **Account Name** column, click the name of the constituent you wish to edit. The **Person Account** page is displayed, as shown in Figure 35 below.

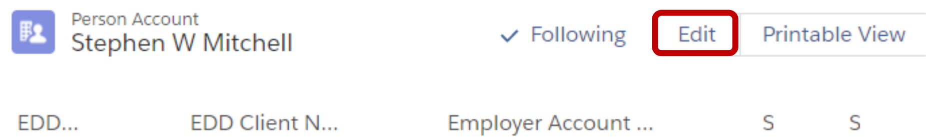


Figure 35: Person Account Page

2. Click the **Edit** button. The Edit Person Account Page is displayed, as shown in [Figure 36](#) below.

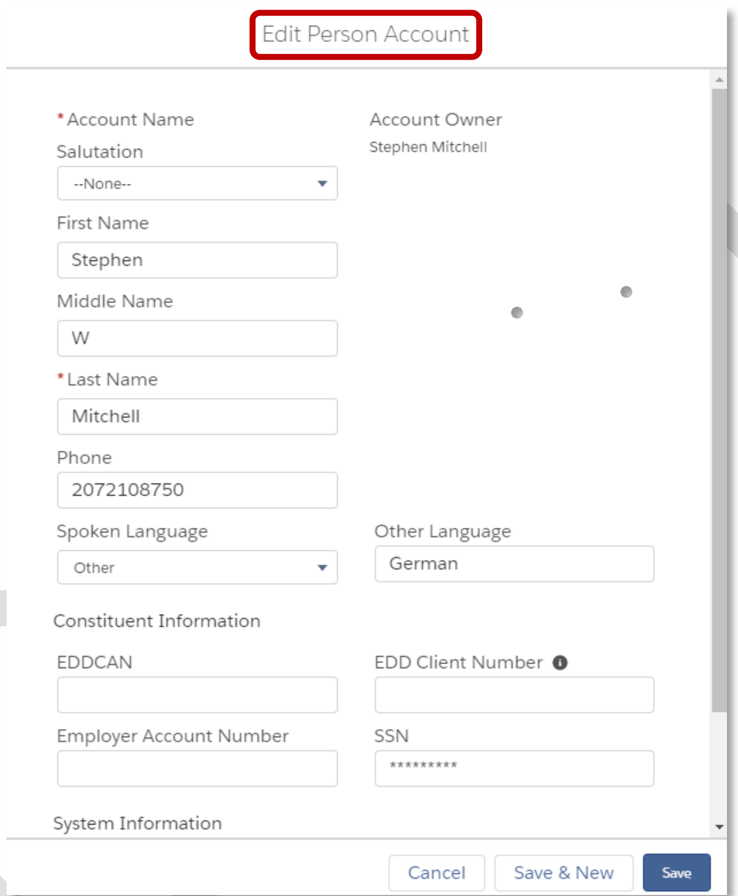


Figure 36: Edit Person Account

The **Edit Person Account** page is divided into two sections, which can be edited and updated.

Account Name – This section contains the following fields, which may be edited:

3. From the **Salutation** drop-down, select from the following values: **Mr**., **Ms**., **Mrs**., **Dr**., **Prof**.
4. In the following fields, enter missing information or correct previously saved data.
    - **First Name**
    - **Middle Name**
    - **Last Name**
    - **Phone**
5. From the Spoken **Language** drop-down, select from the following values: **English**, **Spanish**, **Other**.
6. In the **Other** Language field, add another language, if applicable.

Constituent Information – This section contains the following fields of which only one is required

7. **EDDCAN** – Click in the field, then enter a nine-digit number.
8. **EDD Client Number** – Click in the field, then enter between a seven- and fifteen-digit number.
9. **Employer Account Number** – Click in the field, then enter a nine-digit number.
10. **SSN (Social Security Number** – Click in the field, then enter the constituent's nine-digit SSN.
11. When **you** are satisfied with your edits, update the account by clicking the **Save** button. Otherwise, click **Cancel**. The **Save & New** button will open the **New Account: Constituent** page. See 15.

Caution

One of the following fields must be completed: **EDDCAN**, **Employer Account Number**, **EDD Client Number**, or **SSN** to save the Person Account.

14.2 Inline Edit of the Constituent

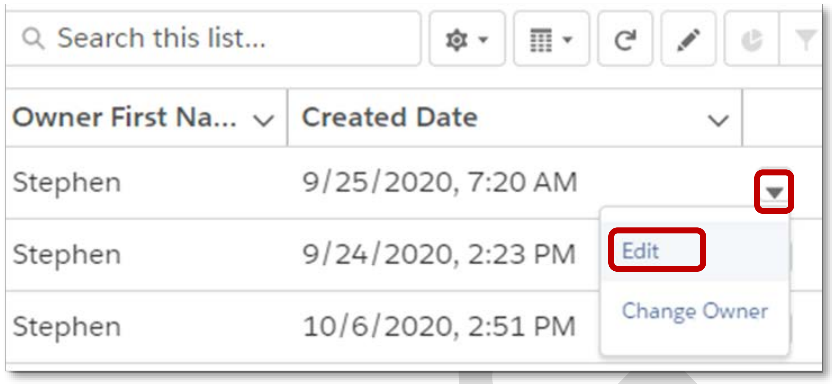


Figure 37: Edit Person Account.

1. To edit the account, select the **Edit** option from the drop-down. You will be directed to the **Edit Person Account** page, as shown in **Figure 38** below.

14.3 Edit Person Account Inline

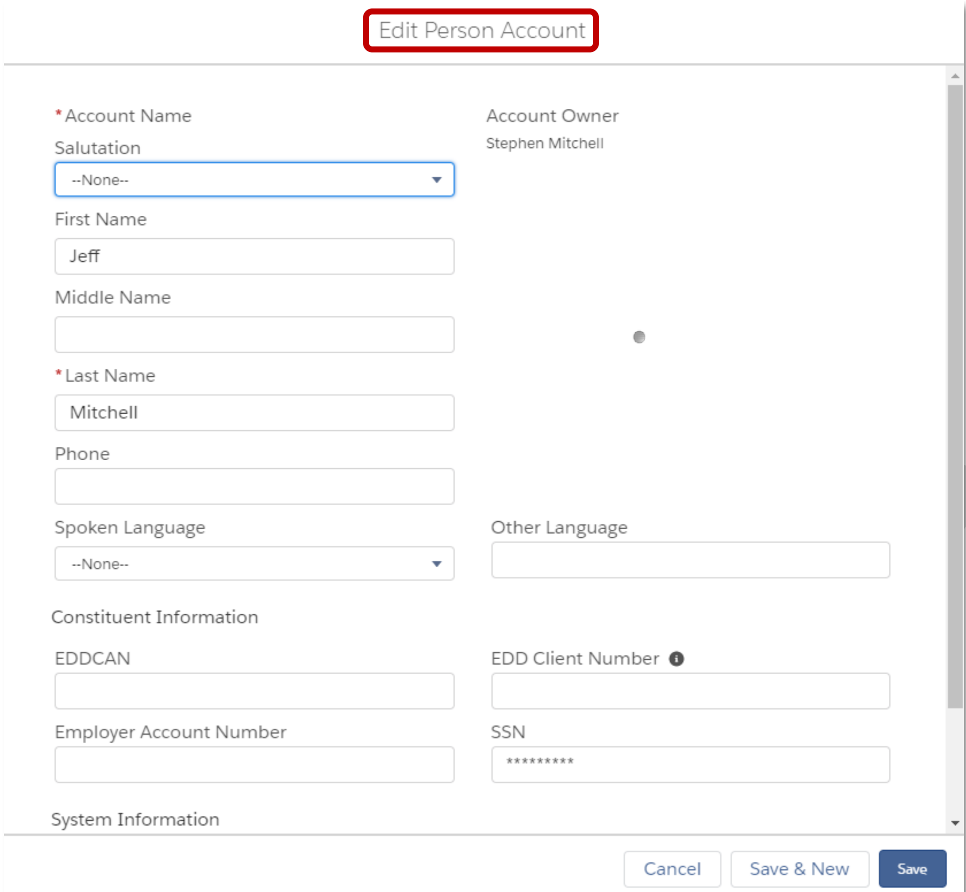


Figure 38: Edit Person Account

The following fields can be edited on the **Edit Person Account** page:

- **Salutation** – The drop-down provides the following choices: **Mr**., **Mrs**., **Ms**., **Miss**, **Dr**., **Prof**.
- **First Name** – This is the first name of the person.
- **Middle Name** – This is the middle name of the person.
- **Last Name** – This is the last name of the person.
- **Phone** – The **Phone** field must contain ten digits.
- **Language Spoken** – The drop-down **English**, **Spanish**, **Other**. The field defaults to **None**.
- **EDDCAN** – The **EDDCAN** is a numeric field and must contain ten numbers.
- **Employer Account Number** – The **Employer Account Number** must contain between 7 and 15 digits.
- **EDD Client Number** – The **ECN** must be nine digits.

- **SSN (social security number)** –The SSN field must contain nine digits.

Caution
To complete the edit and save the **Person Account**, one of the following fields must be completed: **EDDCAN**, **Employer Account Number**, **EDD Client Number**, or **SSN.**

The **Save** button will update and save whatever changes you made to the **Person Account**.

The **Cancel** button will cancel your editing of the **Person Account**.

The **Save and New** button will save your update of the **Person Account**. Then open the **New Account: Constituent** page where you can create a new **Constituent**.

14.4 Change Owner of the Constituent Inline

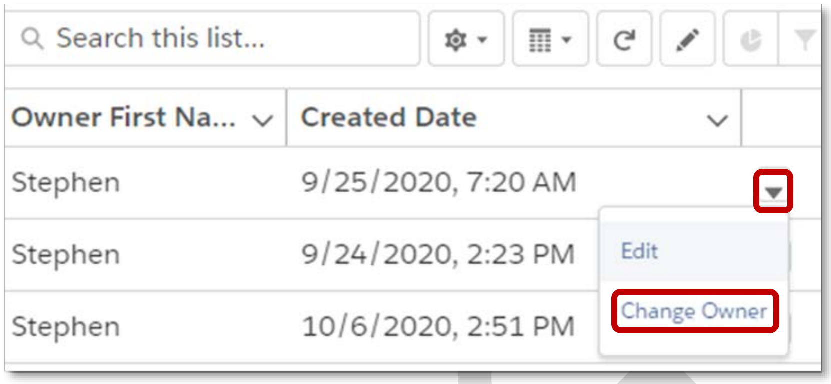


Figure 39: Change Owner of the Person Account.

You do not have permission to change the **Account** owner. Contact you administrator.

15. Creating a New Constituent

The following procedure will demonstrate how to create a new Constituent.

15.1 Creating New Constituent

1. From the **Landing** page, navigate to the **Constituent** list, as shown in **Error! Reference source not found.** below.

Figure 40: : Cinstituent List

2. Click the **New** button. The **New Account: Constituent** page is displayed, as shown in **Figure 41** below.

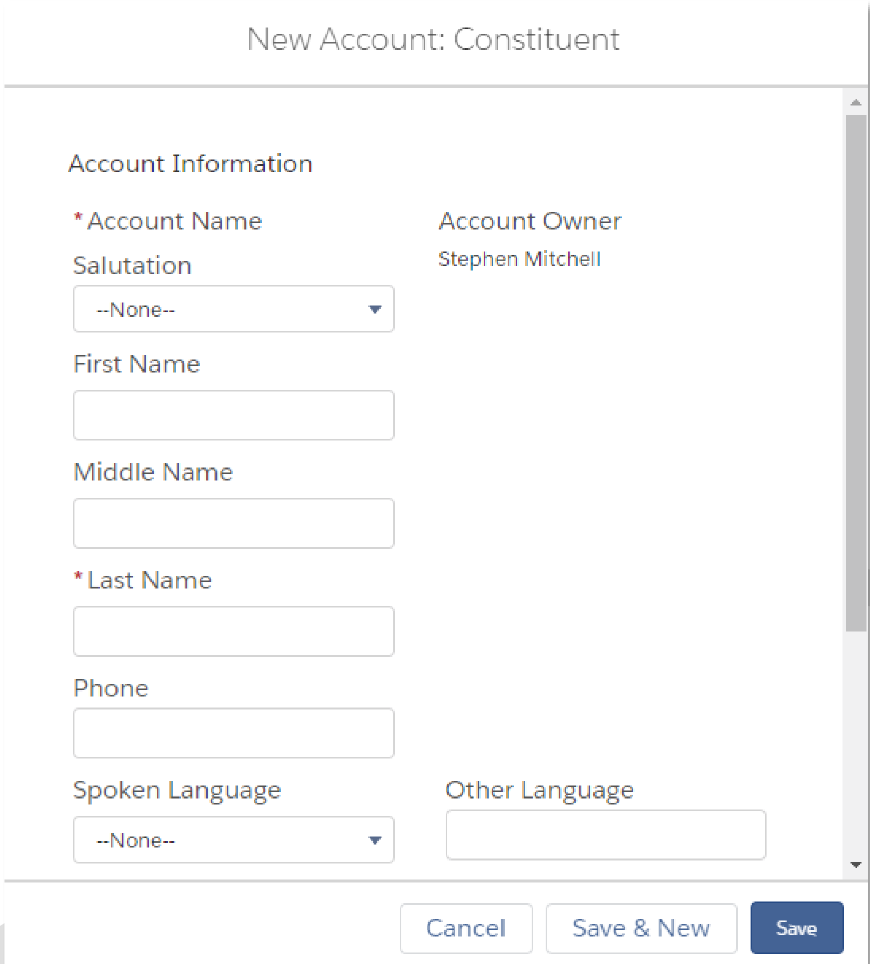


Figure 41: New Account: Constituent

There are two sections displayed on the **New Account: Constituent** page as follows: **Account Information** and **Constituent Information**.

Account Information – This section contains the following fields:

3. From the Salutation drop-down, select from the following values: **Mr**., **Ms**., **Mrs**., **Dr**., **Prof**.
4. In the following fields, enter the correct information.
   - **First Name**
   - **Middle Name**
   - **Last Name**
   - **Phone**
5. From the **Spoken Language** drop-down, select from the following values: **English**, **Spanish**, **Other**.

6. In the **Other Language** field, another language can be added, if applicable.

Constituent Information – This section contains the following fields. Only one of these fields is required:

7. **EDDCAN – Click in the field, then enter a nine-digit number.**
8. **EDD Client Number – Click in the field, then enter between a seven- and fifteen-digit number.**
9. **Employer Account Number – Click in the field, then enter a nine-digit number.**
10. **SSN (Social Security Number – Click in the field, then enter the constituent's nine-digit SSN.**

Caution
One of the following fields must be completed: **EDDCAN**, **Employer Account Number**, **EDD Client Number**, or **SSN** to save the Person Account.

11. **When** you are satisfied with your edits, update the account by clicking the **Save** button. Otherwise, click **Cancel**. The **Save & New** button will open the **New Account: Constituent** page where you may add additional constituents.

16. Case Page Nomenclature

16.1 Understanding the Case Page

The **Case** page where you are directed to by clicking the **Cases** link from the **Landing** page is the area where you will be able to create, edit, and update your cases, as shown in **Figure 42 Cases** page below.

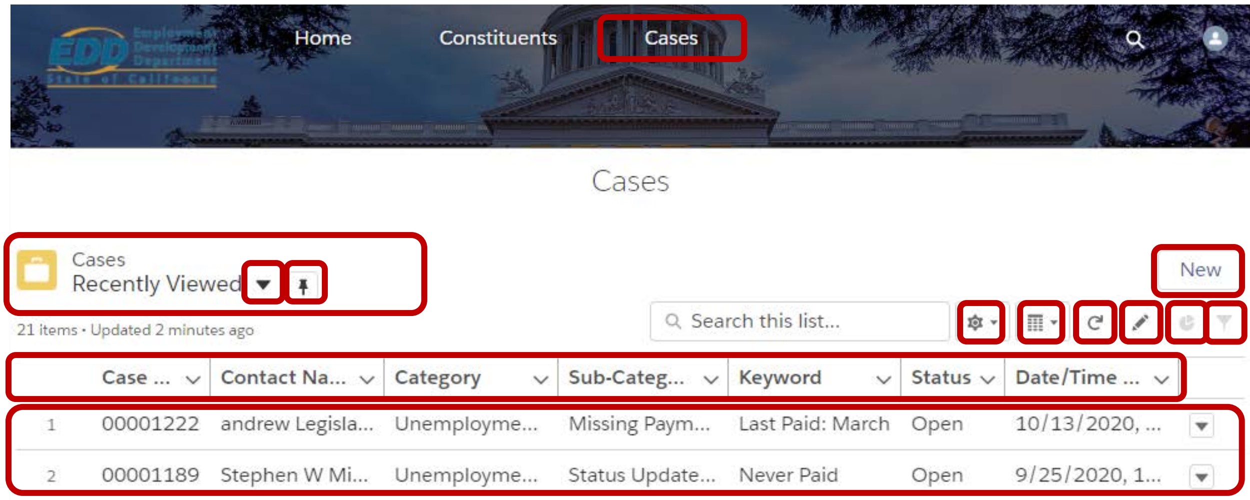


Figure 42: Cases Page, Recently Viewed

16.2 Cases Drop-down Control

When you navigate to the **Cases** page, the list of cases is ordered in the manner in which you last left the order of the list. However, the following views can be displayed by clicking the **Cases** drop-down, which provides the following views.

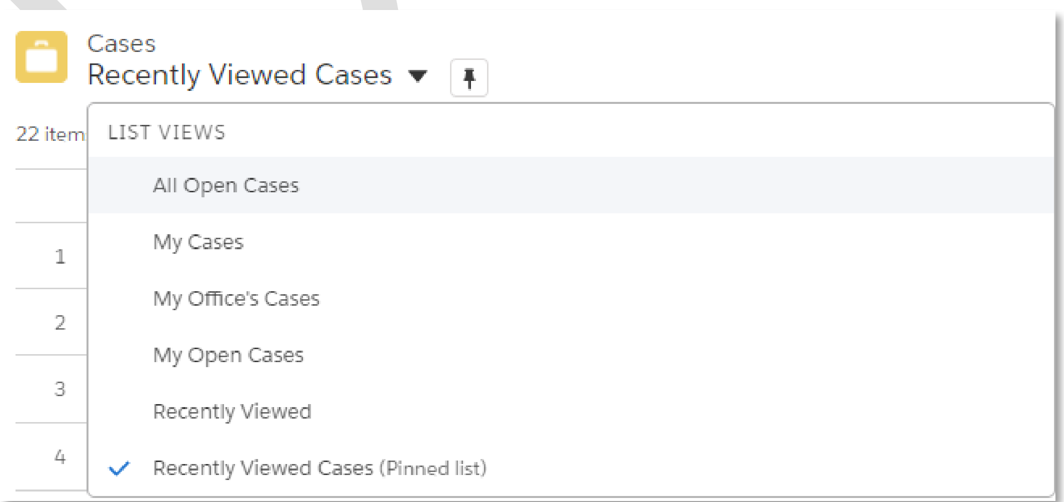


Figure 43: Cases Dropdown Control

- **All Open Cases** – Displays all **Open** cases
- **My Cases** – Displays all cases that are assigned to you.
- **My Office's Cases** – Displays the **Case** list by all cases that other Staff members your office has access to.
- **Pinned List** – Returns the **Case** list you have pinned.
- **Recently Viewed Cases** – When you are working with several cases, they will be displayed at the top of the constituents list when you choose the **Recently Viewed Case** list, shown in **Figure 44**. below.

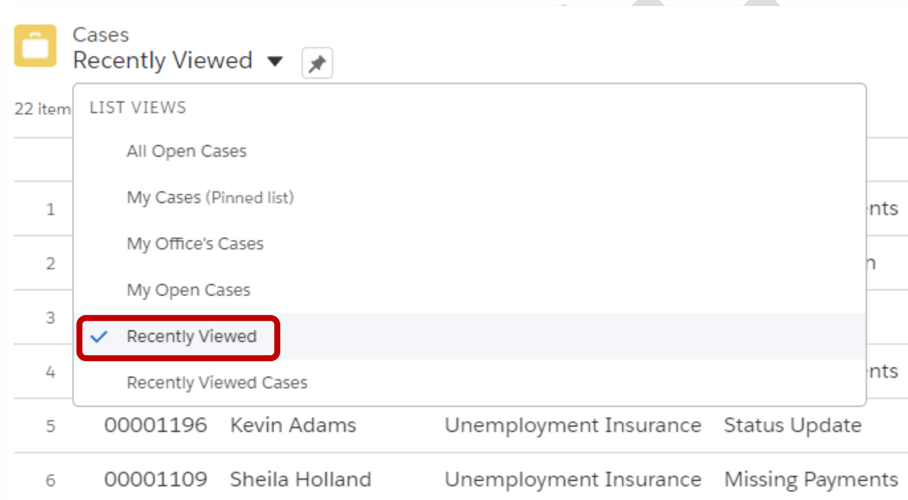


Figure 44: Recently Viewed Drop-down

My Cases – Displays the **Case** list that belongs to you by the first name, as shown in Figure 45 below.

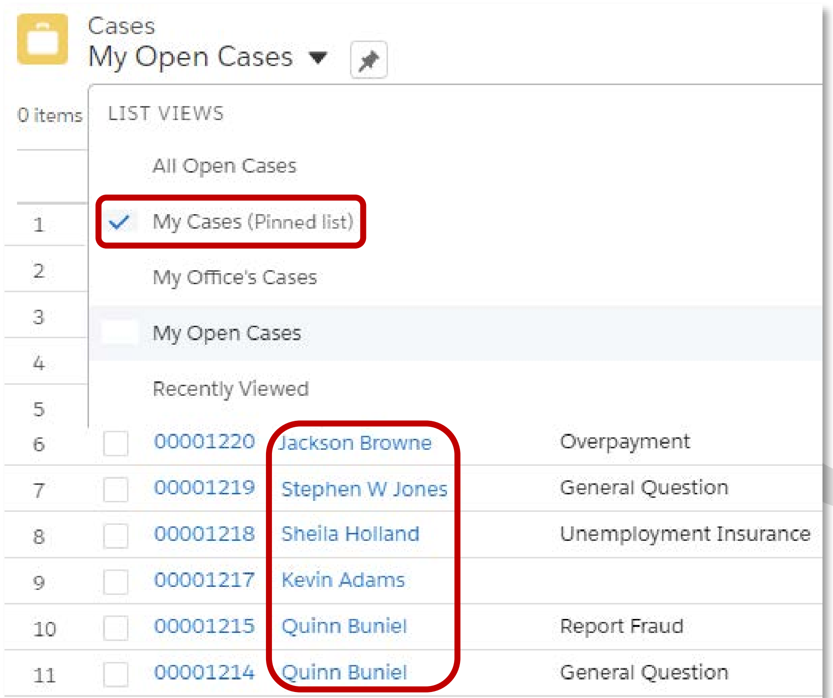


Figure 45: Case List: My Cases

All Open Cases – Displays the **Case** list containing all cases with a status other than **Resolved**, as shown in Figure 46 below.

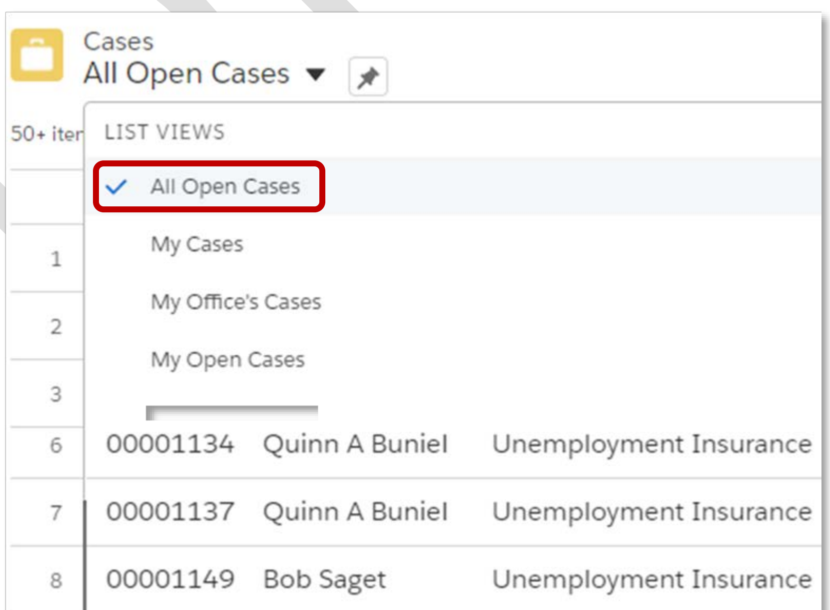


Figure 46: Case List: All Open Cases

- **Pinned List** – When you have a listed ordered in the manner you want to work, you can click the **Pinned** button to save the list's order. To view that same list, after you may have chosen to see the list viewed differently, simply select the **Pinned** list you have saved as displayed in **Figure 47** below.

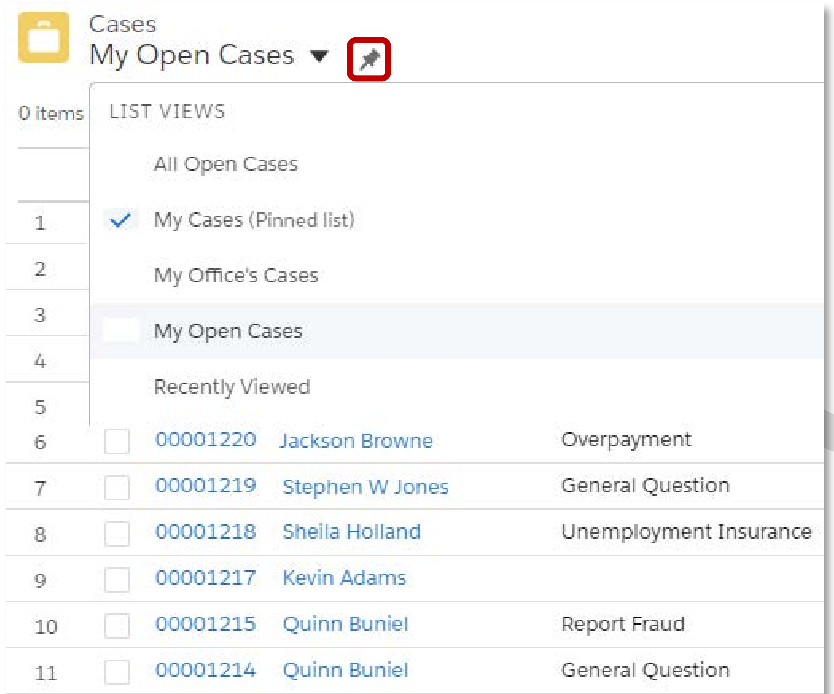


Figure 47: Cases: My Open Cases

- My Office's Cases – Displays the **Case** list available to all staff members of your office. See **Figure 48** below.

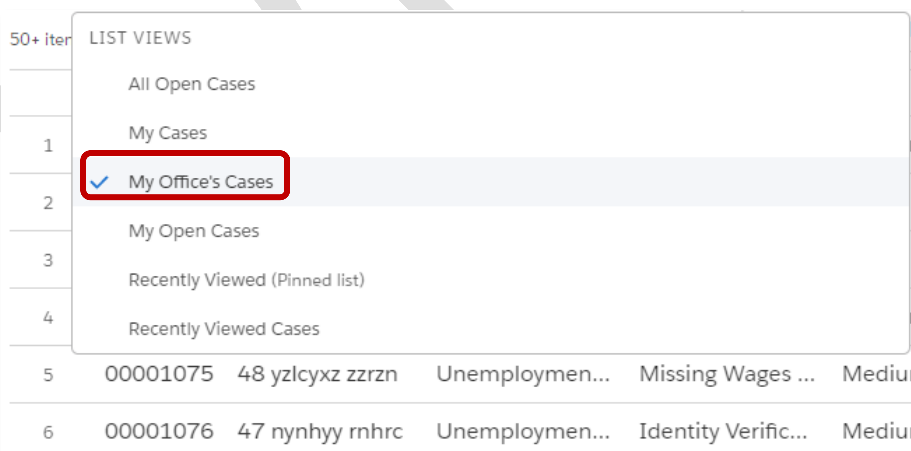


Figure 48: My Office's Constituents List

- **Recently Viewed** (Pinned List) – When you have a listed ordered in the manner you want to work, you can click the **Pinned** button to save the list's order. To view that same list, after you may have chosen to see the list viewed differently, simply select the **Pinned** list you have saved. In this case, **Recently Viewed** cases as you have ordered them are pinned and can be recalled by clicking on the **Case** drop-down list and choosing from the list with the **(Pinned list)** added to the **Case** list you pinned, as seen in [Figure 49](#) below.

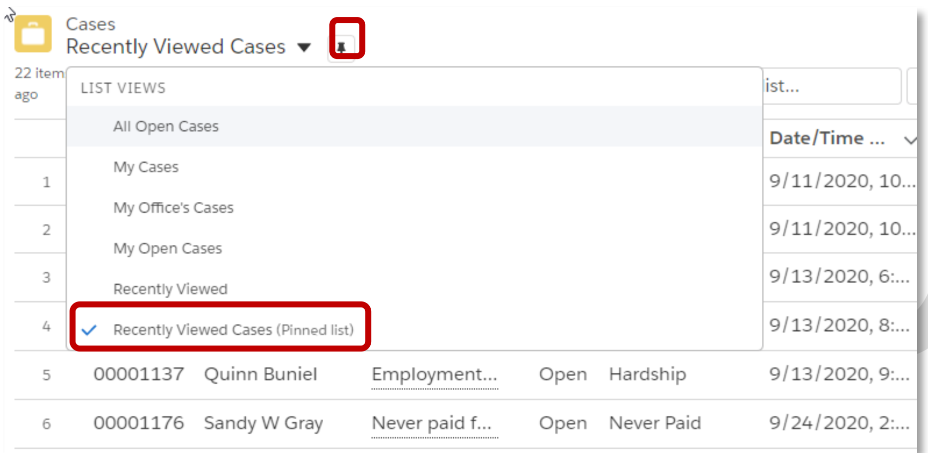


Figure 49: Recently Viewed Pinned List

- Recently Viewed – When you are working with several constituents and their cases, the cases you were working on will display at the top of the **Case** list when you choose the **Recently Viewed** list, as shown in **Figure 50** below.

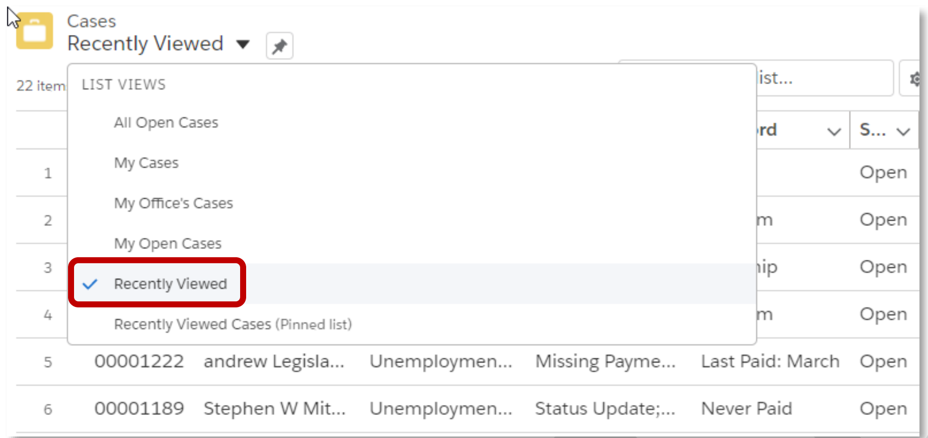


Figure 50: Recently Viewed List

16.3 Searching the Case List

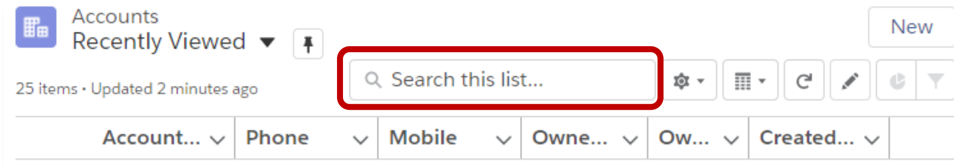


Figure 51: Search this List

Search this list: – Permits you to search for cases by the **Case Number**, **Category**, **Sub-Category**, **Keyword**, **Status**. For instance, if you have a case assigned the **Case** number of 00001187, you can enter the number 1187 in the **Search** bar

The effect will be the case with the case number of 00001187 will be returned in the search results shown in **Figure 52** below.

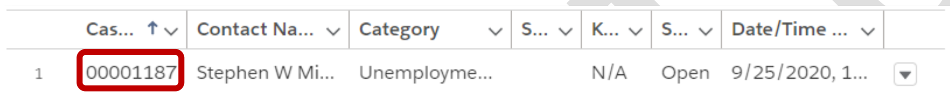


Figure 52: Case Search: Results by Case Number

Similarly, entering a category with **Unemployment Insurance** as the category will return all cases with **Unemployment Insurance** in the search results, as shown in **Figure 53** below.

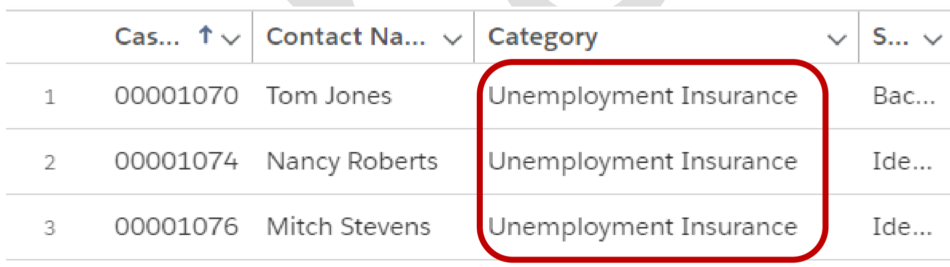


Figure 53 Case Search: Results by Category

A mentioned earlier, you can search by the **Case Number**, **Category**, **Sub-Category**, **Keyword**, and **Status** in a similar fashion, as described above.

16.4 View List, Display As, Refresh, Inline Edit Controls, Edit List, Show Carts, Filter

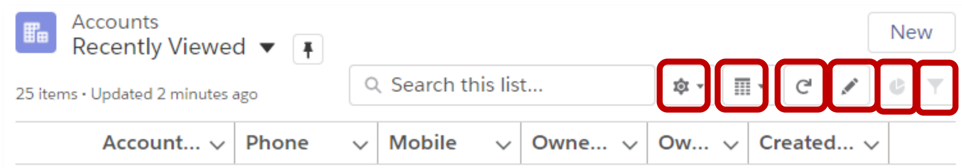


Figure 54: Accounts: Controls

In the **View List** control drop down does not have any functionality at this time.

In the **Display As** control drop-down provides for viewing the Case list in **Table** (list view), the **Kanban** view, which is simply a card-style view of the cases, does not have functionality at this time.

The **Refresh** control simply refreshes the **List** view of the constituents.

The **Inline Edit** control is disabled.

The **Show Charts** control currently does not have any charts configured.

Currently, there is no permission to filter the **Case** list with the **Filter** control .

16.5 Case List Column Headers

The **Constituent List Column Headers** are as follows:

- **Case Number** – Is the case number assigned to the case.
- **Contact Name** – Is the constituent that the case is assigned.
- **Category** – Is the category that was assigned to the case.
- **Sub-Category** – Is the sub-category that was assigned to the case.
- **Subject** – Is the sub-category that was assigned to the case.
- **Status** – Is the status of the case.
- **Keyword** – Is the keyword that is assigned to the case.
- **Date/Time Opened** – Is the date and time the case was created.
- **Case Owner Alias** – If the staff member has been assigned an alias, the staff member's alias name is displayed.

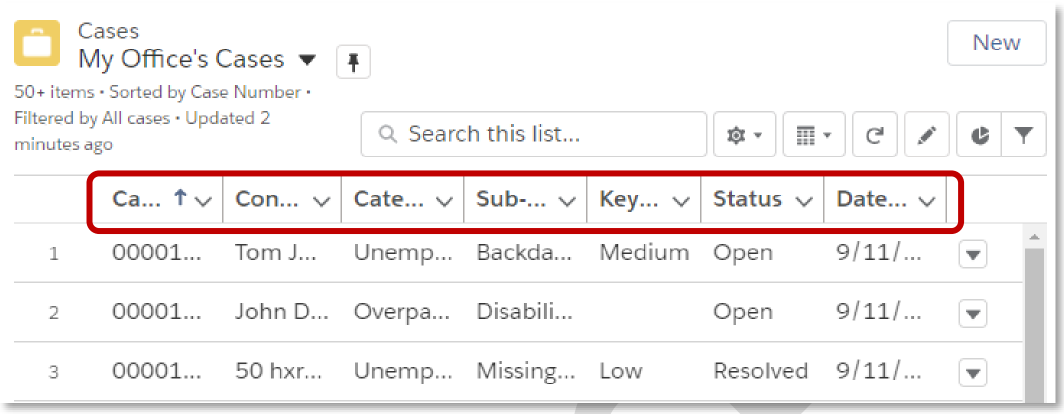


Figure 55: Case List: List Column Headers

16.6 Sorting Case List Column Headers

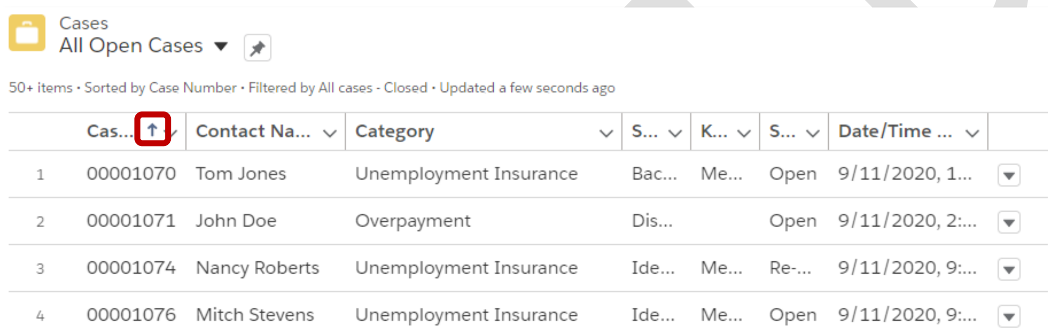


Figure 56: Sort Columns

To sort the rows of a **Case Number** column in either ascending order Case Number ↑ or descending order Case Number ↓, click the corresponding **Column Header**. This action can be applied to each column header: **Case Number**, **Contact Name**, **Category**, **Sub-Category**, **Subject**, **Status**, **Keyword**, **Date/Time Opened**, **Case**, **Owner**, **and Alias**.

16.7 Editing a Case

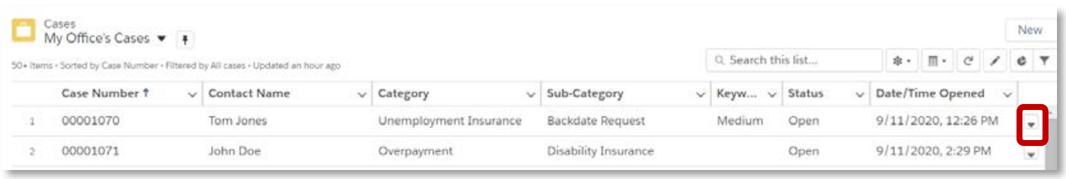


Figure 57: Editing and Updating a Case

Using the techniques described in 16.3 above, or the **Search** bar, navigate to the case you wish to edit and update. Open the case for editing as follows:

1. Click the **Edit** case drop-down highlighted Figure 57 in above. The Edit case form is displayed, as shown in Figure 58 below.

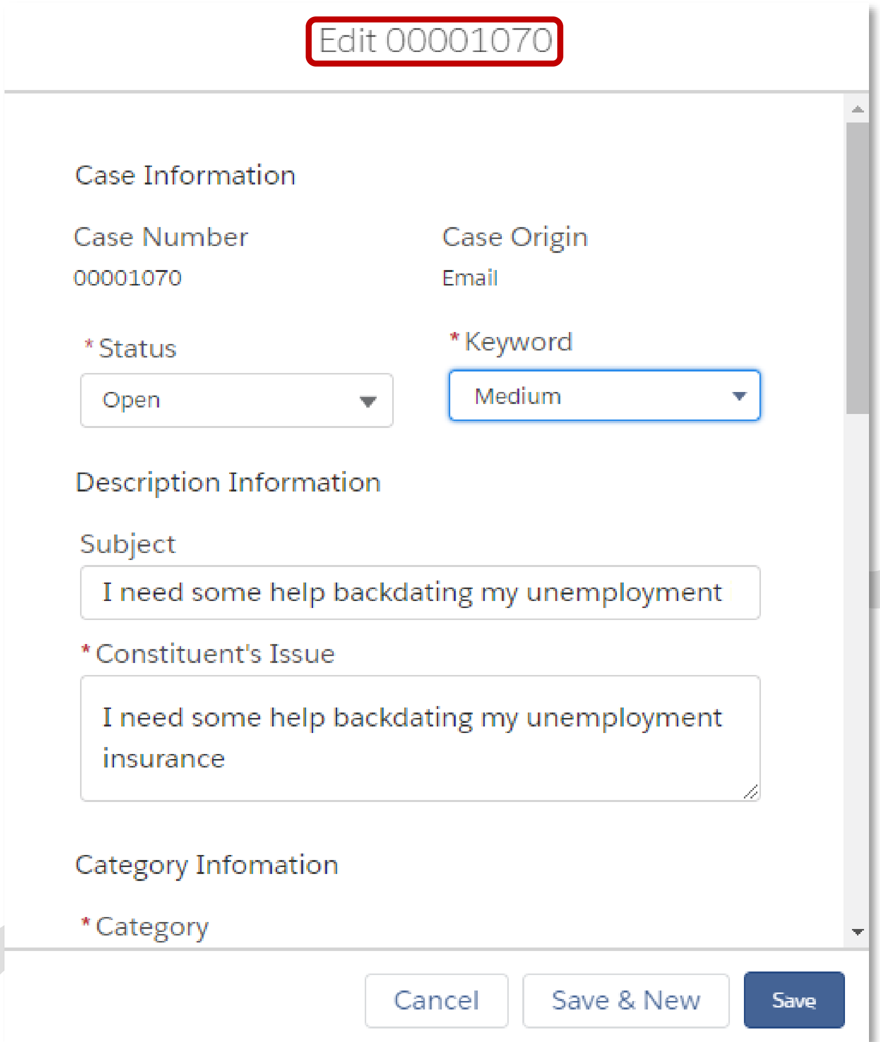


Figure 58: Edit Case

The **Edit Case** form contains four sections, where the appropriate information can be entered, as follows:

- **Case Information** – Contains the following fields:
    - **Status**

        2. The **Status** drop-down defaults to the last status that was assigned to the case. You may choose to assign a different status. The values of the drop-down are **None**, **Open**, **Re-Opened**, **In Progress**. From the **Status** drop-down, select the appropriate status.

    - **Keyword**

        3. From the **Keyword** drop-down, you may choose to assign a different value from one of the following: **None**, **Medium**, **N/A**, **Last Paid March**,

Last Paid April, Last Paid May, **Last Paid June**, **Last Paid July**, **Last Paid August**, **Last Paid September**, **Never Paid**, **Hardship**. Select the **Keyword** value you want to assign.

- **Description Information** – Contains the following fields:
  - o **Subject**

4. In the **Subject** field, you may want to edit the brief description of the Constituent's issue.

  - o **Constituent's Issue**

5. In the Constituent's **Issue** textbox, you can edit the detailed description of the Constituent's issue.

- **Category Information** – Contains the following fields:
  - o **Category** – Is the nature of the Constituent's matter.

6. To edit the **Category**, from the **Category** drop-down, the following values are displayed: **Unemployment Insurance**, **General Question**, **Report Fraud**, **Disability Insurance**, **Paid Family Leave**, **Overpayment**, **Employer Tax Issue**, **Labor Market Information**, and **Workforce Services**. Select the appropriate value to change the **Category** field.

  - o **Sub** – **Category** –. Is the secondary or subordinate division of the **Category** field.

7. In editing the **Sub-Category**, not all categories will populate the S**ub Category** list box. Suppose **Unemployment Insurance** or **Over Payment** options are selected. In that case, the **Available** list box will contain the following values: **Status Update**, **Disqualification**, **Missing Payments**, **Identity Verification**, **Backdate Request**, **EDDCAN Request**, **Missing Wages from Claim, Claim Filing Needed**, **Penalty Weeks**, **Reopen Claim**, **Work Sharing Program**, and **UI Online Registration**.

8. Choose one or more of the available values: When the **Sub Category** values are selected, click the **Right Arrow** to move the **Sub Category** values you have chosen to the **Chosen** list box. In the event values exist in the **Chosen** list box that is not applicable, click the **Left Arrow** to remove the entry from the **Chosen** list box. See Figure 59 below.

Tip

More than one **Sub Category** may be selected. Hold the **CTRL** key down, and choose one or more of any other of the listed values, and move those **Sub-Category** values to the **Chosen** list box.

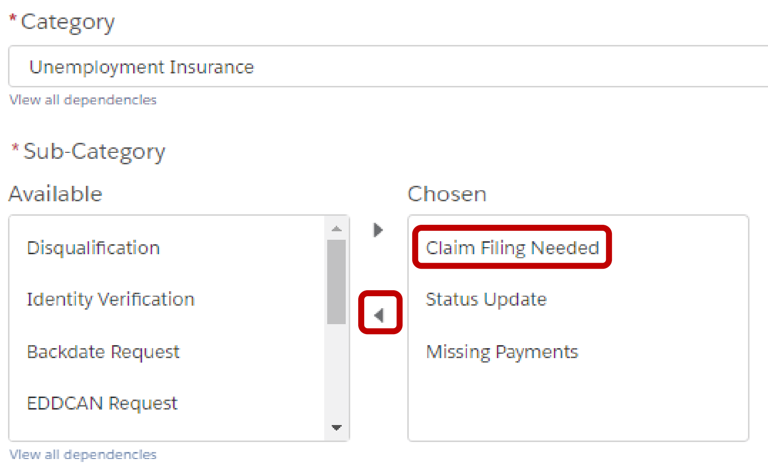


Figure 59: Edit Case: Sub-Category

- **Constituent Information** – Contains the following fields:
  - o **Contact Name** – Is the Constituent's name.
    9. This field defaults to the Constituent of whom the case was initially filed. In the event, you may want to file the case with a different Constituent, click the **X** in the **Contact Name** field to close the field. Then with the **Search Contacts** bar, enter the first few letters of the Constituent's name. Then select the contact name you wish to assign the case. See [Figure 60](#) and [Figure 61](#) below.

Figure 60: Edit Case: Contact Name

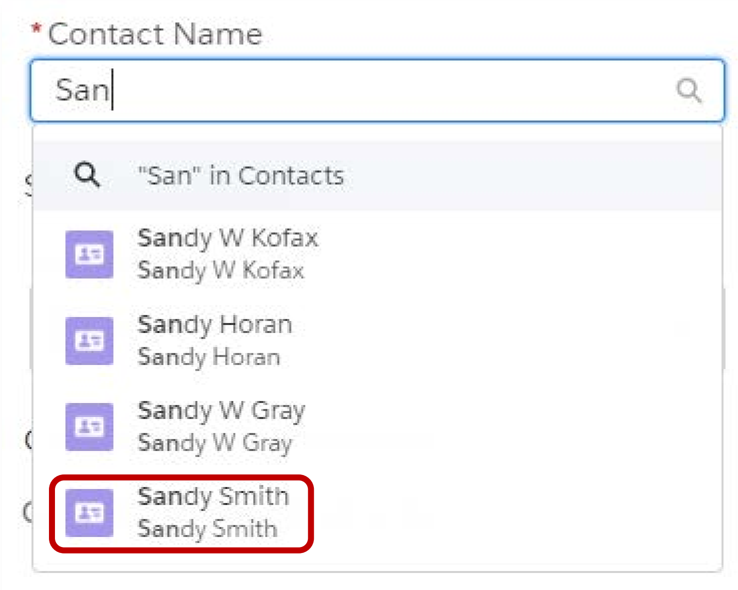


Figure 61: Edit Case: Search Contact Name

- **Legislative Staff** – Is the **Legislative Staff** member to whom the case is assigned for resolution.
    1. In the event, you may want to change the **Staff** member handling the case, click the **X** in the **Legislative Staff** field to close the field. Then with the **Search People** bar, enter the first few letters of the Staff member's name. Then select the Staff member you wish to assign the case. See **Figure 79** and **Figure 80** below.

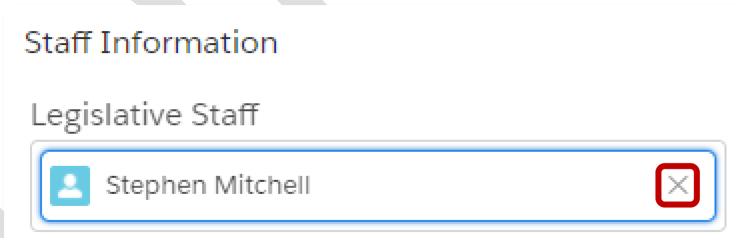


Figure 62: Edit Case: Legislative Staff Member

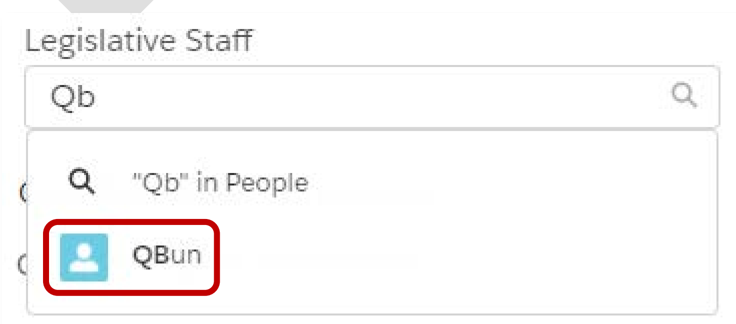


Figure 63: Edit Case: Search Legislative Staff Member

2. To commit the edited case, **click Save**. Click to abandon your edits. The **Save & New** will open the **New Case: Inquiry** page where you may add additional cases.

16.8 Edit Case from the Constituent’s List Page

1. Navigate to the **Constituent List** page.
2. Using the techniques described in 13.3, or the **Search this list** bar, navigate to the Constituent whose case you want to edit.
3. In the **Account Name** column, Click the Constituent whose case you wish to edit. See **Figure 64** below.

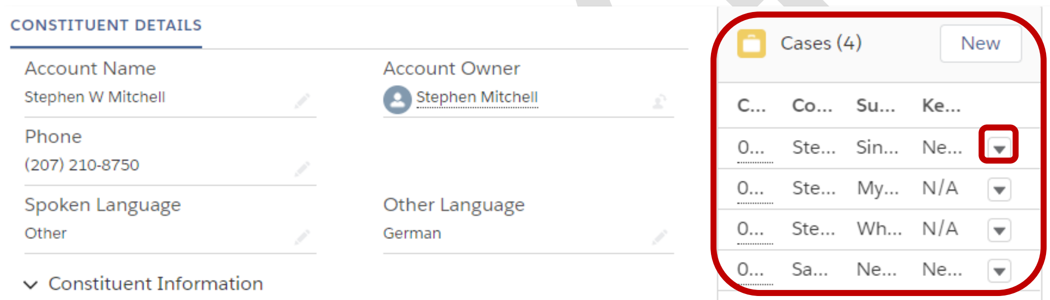


Figure 64: Edit Constituent’s Case

4. In the **Case** panel displayed on the right of the page, click the **Edit** drop-down. Then choose the **Edit** option. The **Case Edit** form will display. See **Figure 65** below.

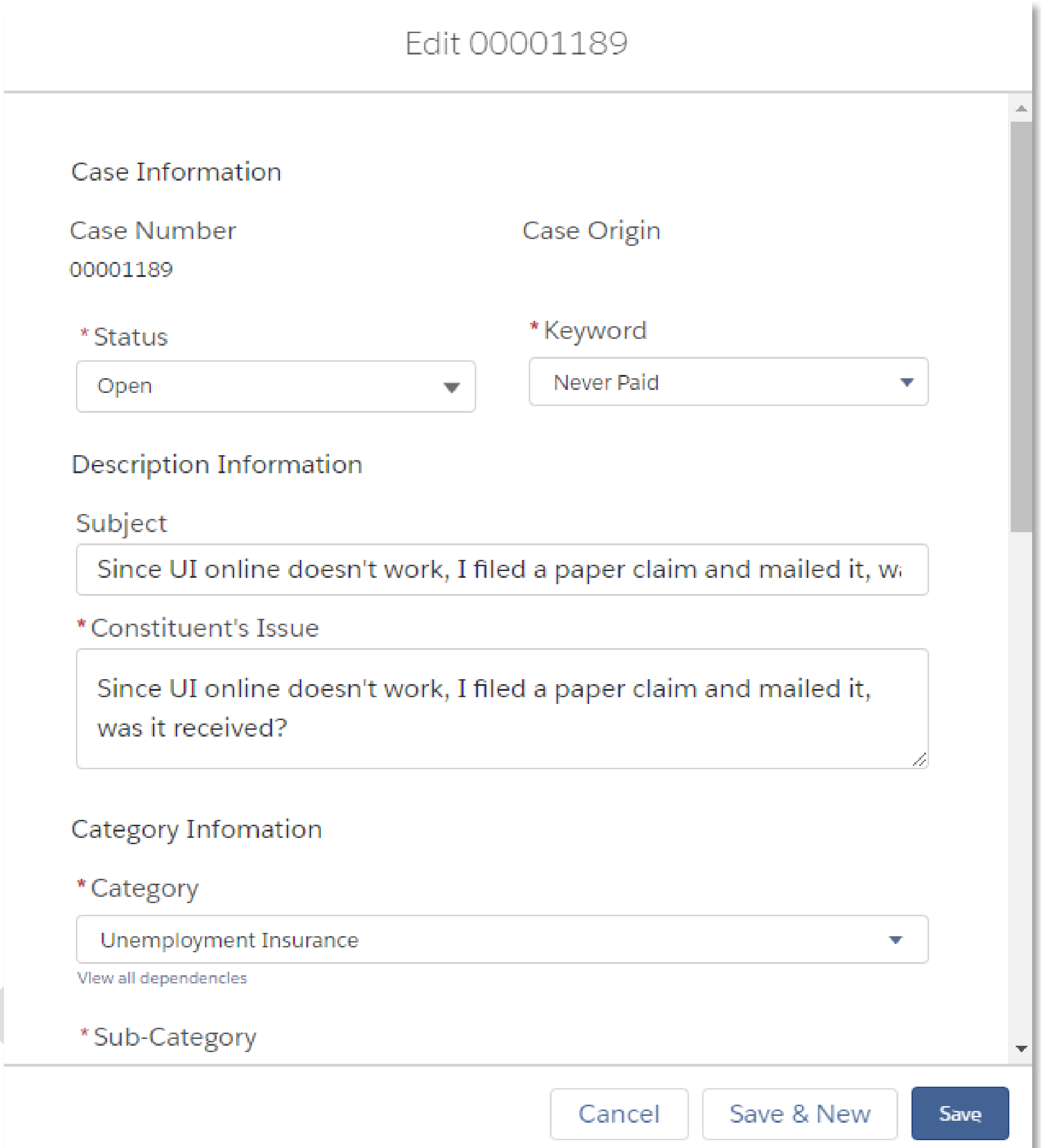


Figure 65: Edit Case from Constituent from Person Account Case Panel

The **Edit Case** form contains four sections, where the appropriate information can be entered, as follows:

- **Case Information** – Contains the following fields:
  - **Status**

    5. The **Status** drop-down defaults to the last status that was assigned to the case. You may choose to assign a different status. The values of the drop-down are **None**, **Open**, **Re-Opened**, **In Progress**. From the **Status** drop-down, select the appropriate status.

- **Keyword**

6. From the **Keyword** drop-down, you may choose to assign a different value from one of the following: **None**, **Medium**, **N/A**, **Last Paid March**, **Last Paid April, Last Paid May**, **Last Paid June**, **Last Paid July**, **Last Paid August**, **Last Paid September**, **Never Paid**, **Hardship**. Select the **Keyword** value you want to assign.

- **Description Information** – Contains the following fields:
  - **Subject**

7. In the **Subject** field, you may want to edit the brief description of the Constituent's issue.

- **Constituent's Issue**

8. In the Constituent's **Issue** textbox, you can edit the detailed description of the Constituent's issue.

- **Category Information** – Contains the following fields:
  - **Category** – Is the nature of the Constituent's matter.

9. To edit the **Category**, from the **Category** drop-down, the following values are displayed: **Unemployment Insurance**, **General Question**, **Report Fraud**, **Disability Insurance**, **Paid Family Leave**, **Overpayment**, **Employer Tax Issue**, **Labor Market Information**, and **Workforce Services**. Select the appropriate value to change the **Category** field.

- **Sub** – **Category** –. Is the secondary or subordinate division of the **Category** field.

10. In editing the **Sub-Category**, not all categories will populate the S**ub Category** list box. Suppose **Unemployment Insurance** or **Over Payment** options are selected. In that case, the **Available** list box will contain the following values: **Disqualification**, **Missing Payments**, **Identity Verification**, **Backdate Request**, **EDDCAN Request**, **Missing Wages from Claim, Claim Filing Needed**, **Penalty Weeks**, **Reopen Claim**, **Work Sharing Program**, and **UI Online Registration**.

11. Choose one or more of the available values: When the **Sub Category** values are selected, click the **Right Arrow** to move the **Sub Category** values you have chosen to the **Chosen** list box. In the event values exist in the **Chosen** list box that is not applicable, click the **Left Arrow** to remove the entry from the **Chosen** list box. See [Figure 66](#) below.

Tip

More than one **Sub Category** may be selected. Hold the **CTRL** key down, and choose one or more of any other of the listed values, and move those **Sub-Category** values to the **Chosen** list box.

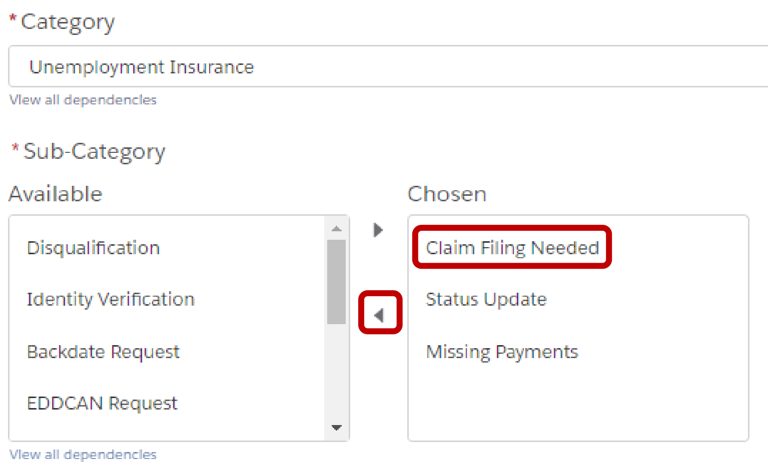


Figure 66: Edit Case: Sub-Category

- **Constituent Information** – Contains the following fields:
  - **Contact Name** – Is the Constituent's name.

12. This field defaults to the Constituent of whom the case was initially filed. In the event, you may want to file the case with a different Constituent, click the **X** in the **Contact Name** field to close the field. Then with the **Search Contacts** bar, enter the first few letters of the Constituent's name. Then select the contact name you wish to assign the case. See [Figure 67] and [Figure 68] below.

Figure 67: Edit Case: Contact Name

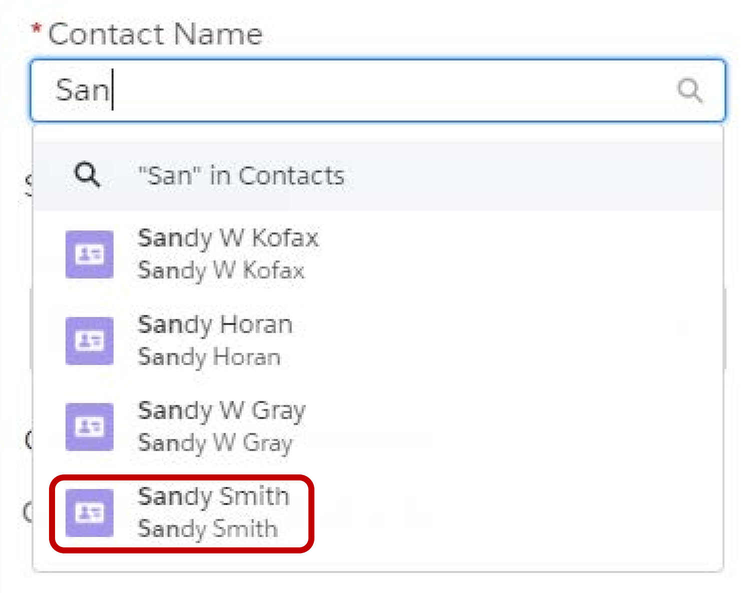


Figure 68: Edit Case: Search Contact Name

- **Legislative Staff** – Is the **Legislative Staff** member to whom the case is assigned for resolution.

13. In the event, you may want to change the **Staff** member handling the case, click the **X** in the **Legislative Staff** field to close the field. Then with the **Search People** bar, enter the first few letters of the Staff member's name. Then select the Staff member you wish to assign the case. See **Figure 69** and **Figure 70** below.

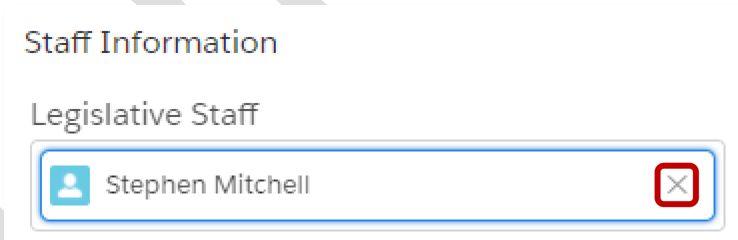


Figure 69: Edit Case: Legislative Staff Member

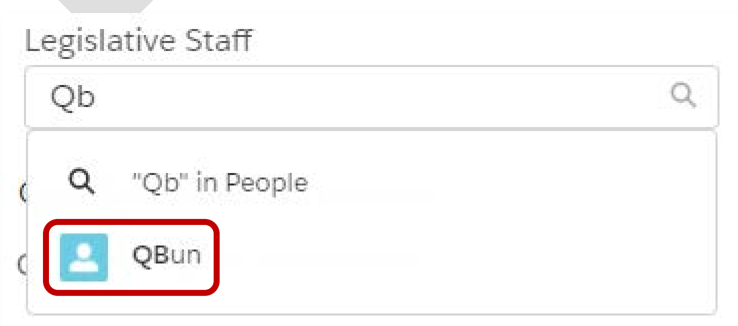
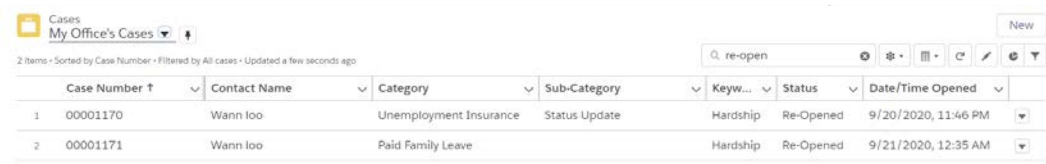


Figure 70: Edit Case: Search Legislative Staff Member

14. To commit the edited case, **click Save**. Click to abandon your edits. The **Save & New** will open the **New Case: Inquiry** page where you may add additional cases.

16.9 New Case: Inquiry

Clicking the **New** button on the **Case** list page, shown in below, will open up the **New Case: Inquiry** page, shown in below.



	Case Number	Contact Name	Category	Sub-Category	Keyw...	Status	Date/Time Opened
1	00001170	Wann loo	Unemployment Insurance	Status Update	Hardship	Re-Opened	9/20/2020, 11:46 PM
2	00001171	Wann loo	Paid Family Leave		Hardship	Re-Opened	9/21/2020, 12:35 AM

Figure 71: Search Case to Edit

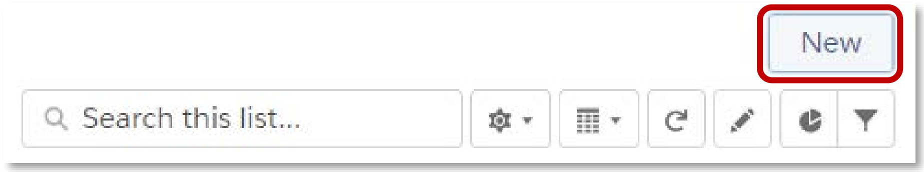


Figure 72: New Case: Inquiry

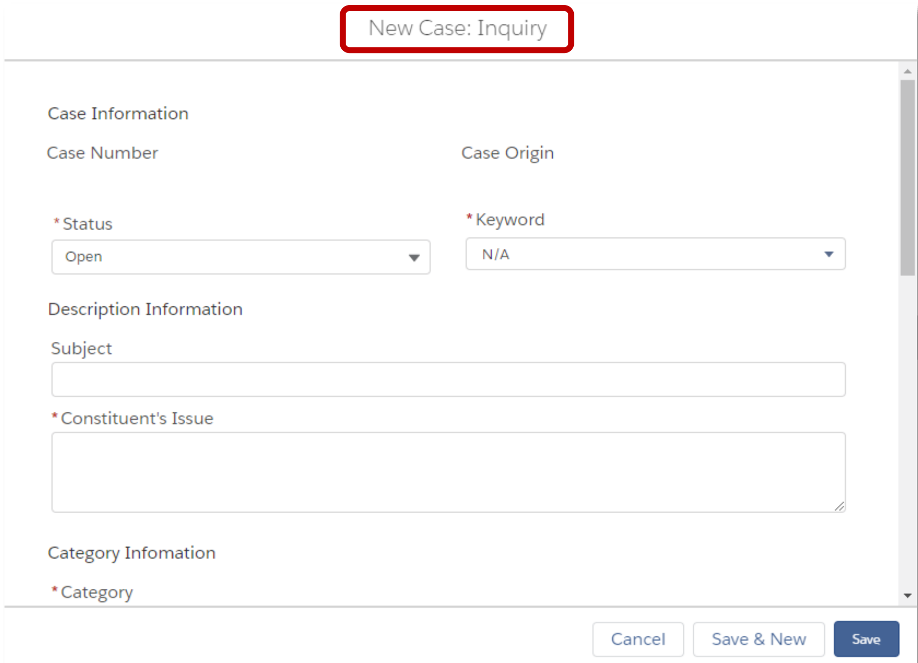


Figure 73: New Case: Inquiry Page

Creating a **New Case** is discussed later in another section of this guide. See also**Error! Reference source not found.**.

17. Editing and Updating Case

This section will explain how to edit a case for the selected case.

17.1 Inline Edit and Update Case

1. Using **the** techniques described in the16.2l or 13.3 navigate to the Constituent, you wish to edit an existing case.
2. In the **Contact** column, click the name of the constituent. The **Person Account** page is displayed, as shown in Figure 74 below. The associated cases for the Constituent are listed on the right of the page.

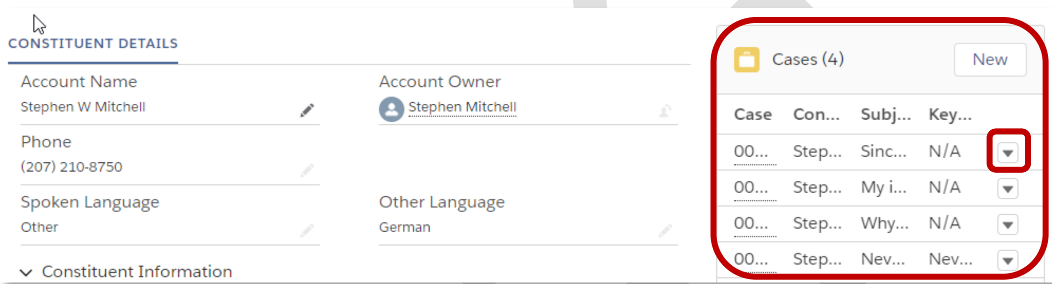


Figure 74: Edit Case: Person Account

3. In the **Case** panel, click the **Edit** drop-down for the case you wish to edit. The **Edit** page is displayed, as shown in Figure 75 below.

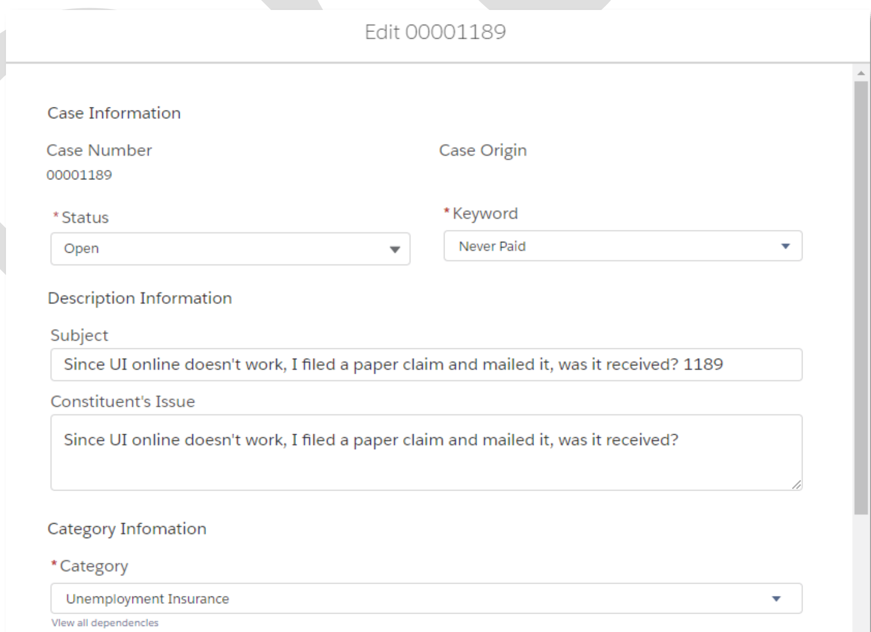


Figure 75: Edit Constituent Case

The **New Case: Inquiry** page contains four sections, where the appropriate information can be entered, as follows:

- **Case Information** – Contains the following fields:
  - o **Status**

4. The **Status** drop-down defaults to the last status that was assigned to the case. You may choose to assign a different status. The values of the drop-down are **None**, **Open**, **Re-Opened**, **In Progress**. From the **Status** drop-down, select the appropriate status.
   - o **Keyword**
5. From the **Keyword** drop-down, you may choose to assign a different value from one of the following: **None**, **N/A**, **Last Paid March**, **Last Paid April, Last Paid May**, **Last Paid June**, **Last Paid July**, **Last Paid August**, **Last Paid September**, **Never Paid**, **Hardship**. Select the value you want to assign.

- **Description Information** – Contains the following fields:
  - o **Subject**

    6. In the **Subject** field, you may want to edit the brief description of the Constituent's issue.
  - o **Constituent's Issue**

    7. In the Constituent's **Issue** textbox, You can edit the detailed description of the Constituent's issue.
- **Category Information** – Contains the following fields:
  - o **Category** – Is the nature of the Constituent's matter.

    8. To edit the **Category**, from the drop-down, select from one of the following values: **Unemployment Insurance**, **General Question**, **Report Fraud**, **Disability Insurance**, **Paid Family Leave**, **Overpayment**, **Employer Tax Issue**, **Labor Market Information**, **Workforce Services**.
  - o **Sub** – **Category** –. Is the secondary or subordinate division of the **Category** field.

    9. To edit the **Sub-Category** ◂ ne list box will populate if **Unemployment Insurance** or **Over Payment** options are selected for the **Category**. In the **Available** list box, choose one or more of the available values: When the **Sub Category** values are selected, click the **Right Arrow** ▸ to move the **Sub Category** values you have selected to the **Chosen** list box. Click the **Left Arrow** ◂ to remove **Sub-Category** entries from the **Chosen** list box. See **Figure 76** below.

Tip

More than one **Sub Category** may be selected. Hold the **CTRL** key down, and choose one or more of any other of the listed values, and move those **Sub-Category** values to the **Chosen** list box. Then choose **Cancel**, **Save & New,** or the **Save** options. The same is true for removing **Sub- Categories** from the **Chosen** list box.

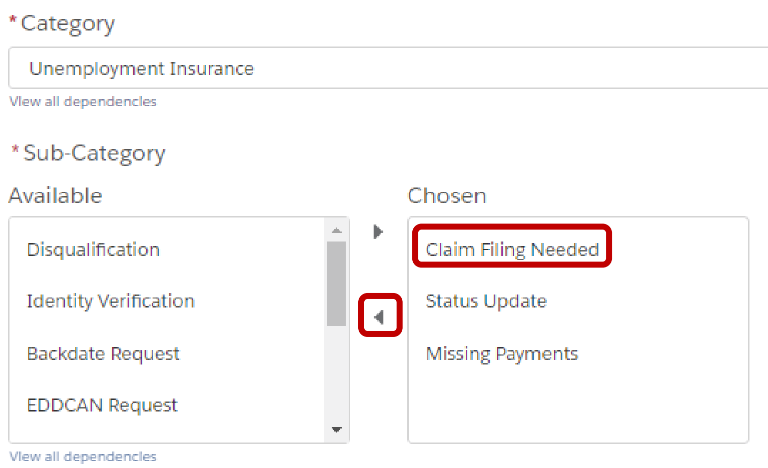


Figure 76: Edit Case: Sub-Category

17.2 Edit and Update Contact Name

- **Constituent Information** – Contains the following fields:
  - o **Contact Name** – Is the Constituent's name.

10. This field defaults to the Constituent of whom the case was initially filed. In the event, you may want to file the case with a different Constituent, click the **X** in the **Contact Name** field to close the field. Then with the **Search Contacts** bar, enter the first few letters of the Constituent's name, Then select the contact name you wish to assign the case. See **Figure 77** and **Figure 78** below.

Figure 77: Edit Case: Contact Name

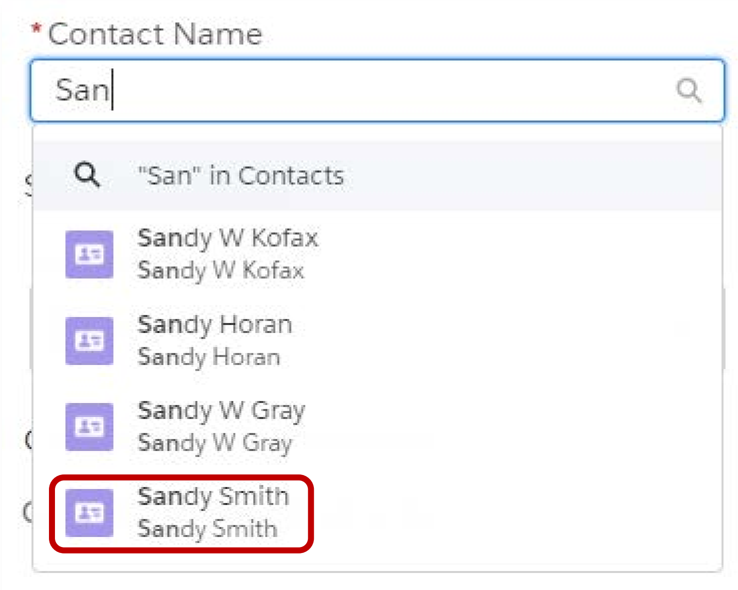


Figure 78: Edit Case: Search Contact Name

17.3 Edit and Update Staff Information

- **Legislative Staff** – Is the Legislative staff member to whom the case is assigned for resolution.

11. In the event, you may want to change the **Staff** member handling the case, click the **X** in the **Legislative Staff** field to close the field. Then with the **Search People** bar, enter the first few letters of the Staff member's name. Then select the Staff member you wish to assign the case. See **Figure 79** and **Figure 80** below.

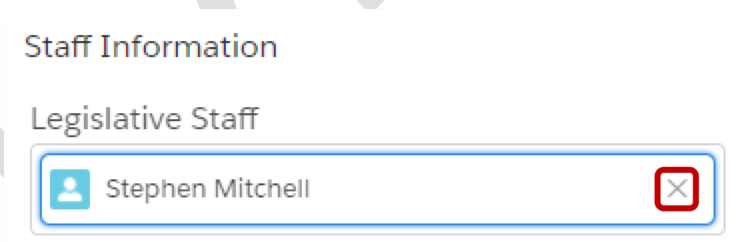


Figure 79: Edit Case: Legislative Staff Member

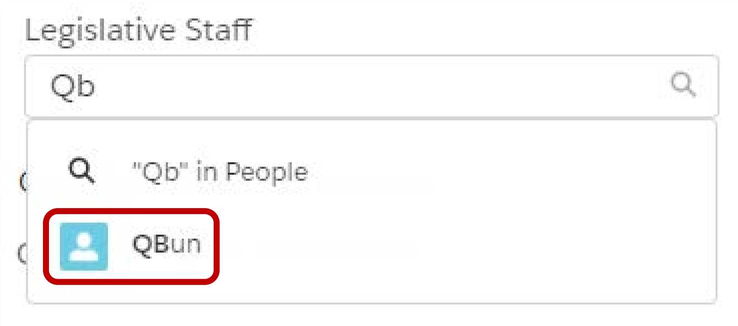


Figure 80: Edit Case: Search Legislative Staff Member

12. To commit the edited case, **click Save**. The **Save & New** will open the **New Case: Inquiry** page where you may add additional cases.

18. Creating a New Case for the Constituent

This section will demonstrate how to create a new **Case** for the selected **Constituent**.

18.1 Creating New Case

1. Using the techniques described in the 13.2, navigate to the Constituent, you wish to associate a new case.
2. In the **Account Name** column, click the name of the constituent. The **Person Account** page is displayed, as shown in Figure 81 below. The associated cases for the Constituent are listed on the right of the page.

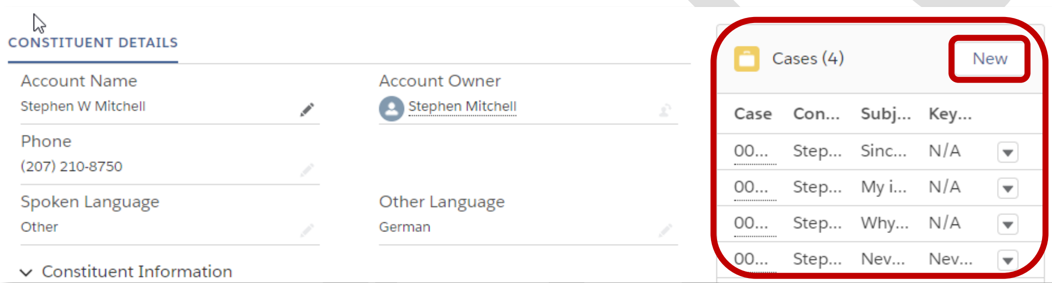


Figure 81: Person Account

3. In the **Case** panel, click **New**. The **New Case: Inquiry** page is displayed, as shown in Figure 82 below.

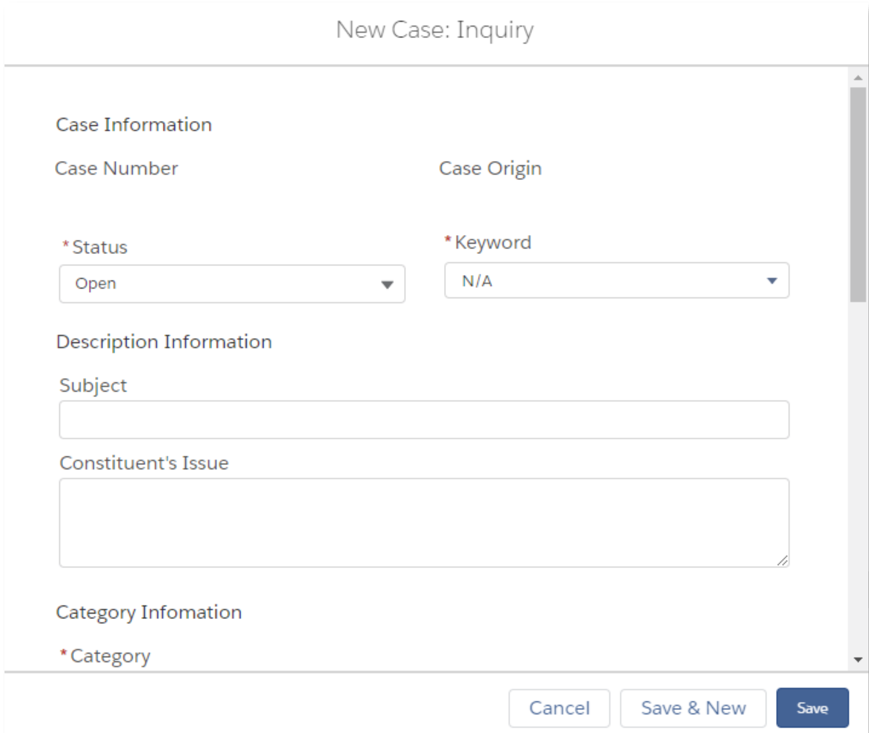


Figure 82: New Case: Inquiry

The **New Case: Inquiry** page contains four sections, where the appropriate information can be entered, as follows:

- **Case Information** – Contains the following fields:
  - **Status**
    4. The **Status** drop-down defaults to the **Open** status. You may choose to assign a different status. The values of the drop-down are **None**, **Open**, **Re-Opened**, **In Progress**. From the **Status** drop-down, select the appropriate status.
  - **Keyword**
    5. From the **Keyword** drop-down, choose the appropriate value from one of the following: **None**, **N/A**, **Last Paid March**, **Last Paid April, Last Paid May**, **Last Paid June**, **Last Paid July**, **Last Paid August**, **Last Paid September**, **Never Paid**, **Hardship**.

- **Description Information** – Contains the following fields:
  - o **Subject**

    6. In the **Subject** field, enter a brief description of the Constituent's issue.
  - o **Constituent's Issue**

    7. In the Constituent's **Issue** textbox, Enter a detailed description of the Constituent's issue.
- **Category Information** – Contains the following fields:
  - o **Category** – Is the nature of the Constituent's matter.

    8. In the **Category** drop-down, select from one of the following values: **Unemployment Insurance**, **General Question**, **Report Fraud**, **Disability Insurance**, **Paid Family Leave**, **Overpayment**, **Employer Tax Issue**, **Labor Market Information**, **Workforce Services**.
  - o **Sub – Category** –. Is the secondary or subordinate division of the **Category** field.

    9. The **Sub-**Category list box will populate if **Unemployment Insurance** or **Over Payment** options are selected for the **Category**. In the **Available** list box, choose one or more of the available values: When the **Sub Category** values are selected, click the **Right Arrow** ▸ to move the **Sub Category** values you have selected to the **Chosen** list box. See Figure 83 below.

Tip

More than one **Sub Category** may be selected. Hold the **CTRL** key down, and choose one or more of any other of the listed values, and move those **Sub-Category** values to the **Chosen** list box. Then choose **Cancel**, **Save & New,** or the **Save** options.

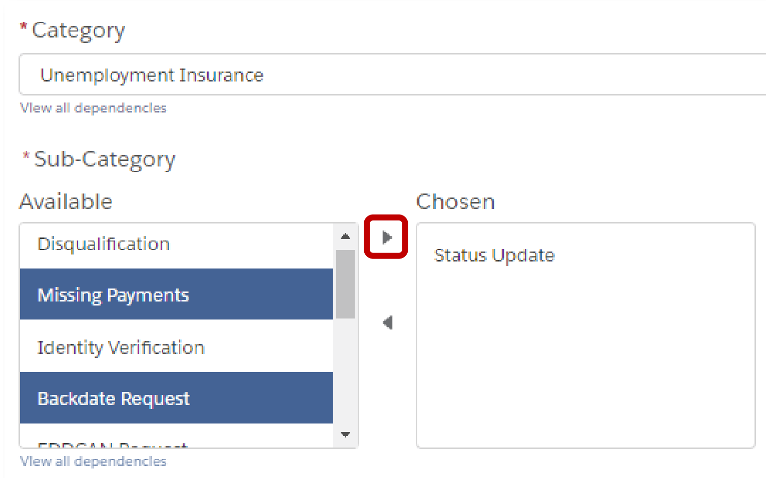


Figure 83: New Case: Sub-Category-

- **Constituent Information** – Contains the following fields:
    - **Contact Name** – Is the Constituent's name.

        10. This field defaults to the Constituent of whom the case was initially filed. In the event, you may want to file the case with a different Constituent, click the **X** in the **Contact Name** field to close the field. Then with the **Search** bar, enter the first few letters of the Constituent's name, Then select the contact name you wish to assign the case. See [Figure 84] and [Figure 75] below.

Figure 84: New Case: Contact Name

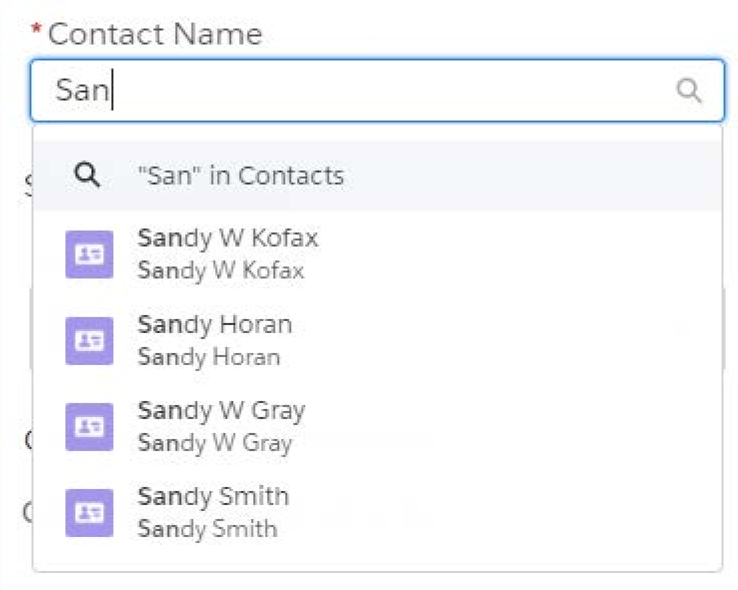


Figure 85: New Case: Search Contact Name

- **Legislative Staff** – Is the Legislative staff member to whom the case is assigned for resolution.

11. In the event, you may want to change the Staff member handling the case, click the **X** in the **Legislative Staff** field to close the field. Then with the **Search** bar, enter the first few letters of the Staff member's name. Then select the Staff member you wish to assign the case. See [Figure 86](#) and [Figure 87](#) below.

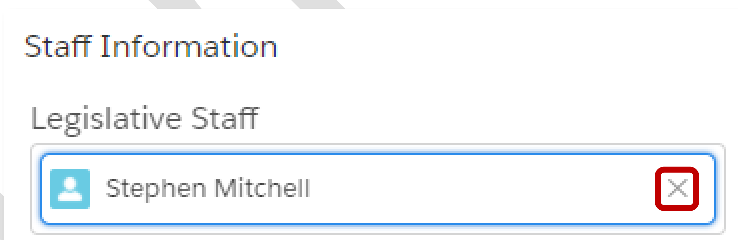


Figure 86: New Case: Legislative Staff Member

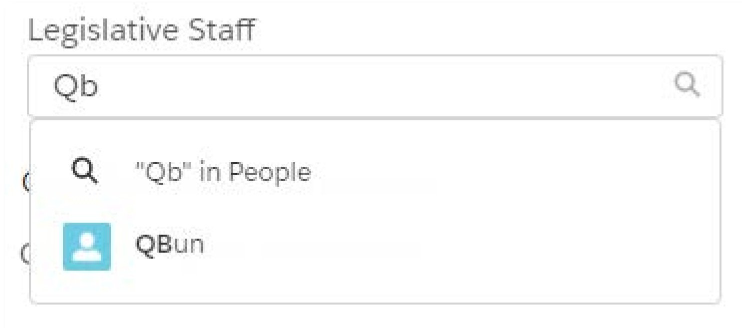


Figure 87: New Case: Search Legislative Staff Member

12. To commit the case, **click Save**. The **Save & New** will open the **New Case: Inquiry** page where you may add additional cases.

19. Appendix A: View, Edit Account Owner

1. Using the techniques described in the 13.2, select and open an **Account Name**.
2. From the Landing page, Click Constituents. Using the techniques described in the 13.2 above, select and open an Account Name.

The following **Person Account** page is displayed.

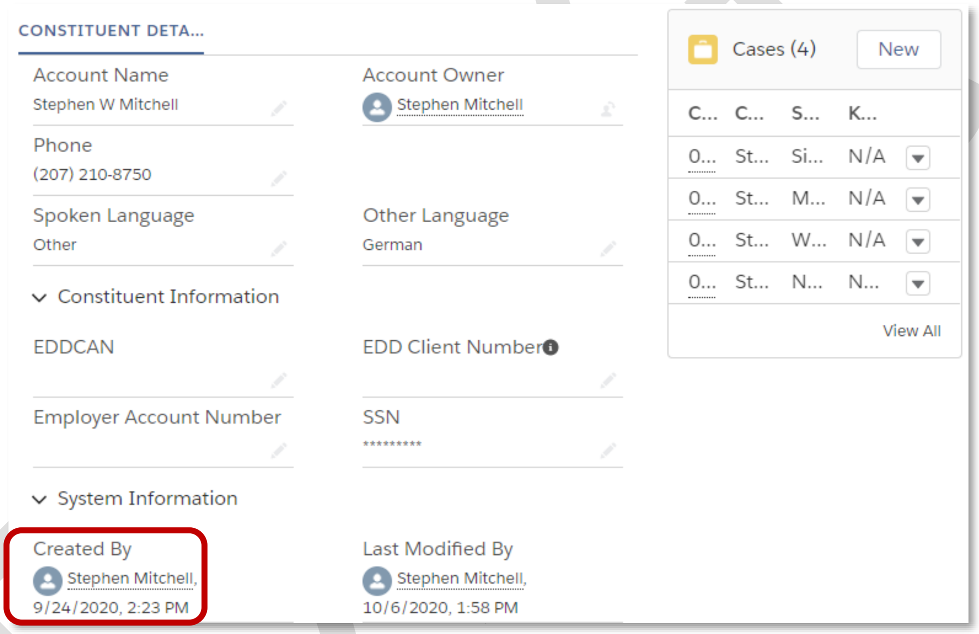


Figure 88: Person Account Page

3. Click the Created by link.

View List, Display As, Refresh Inline Edit Controls

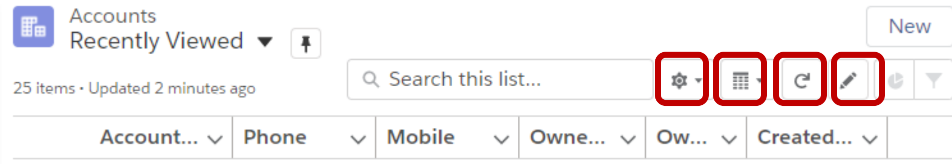


Figure 89: Accounts: Controls

In the **View List** control drop down does not have any functionality at this time.

In the Display **As** control drop-down, the Kanban view, which is simply a card-style view of the constituents, does not have functionality at this time.

The Refresh control simply refreshes the **List** view of the constituents.

The Inline **Edit** control is disabled.

20. Table of Figures

21. Table of Tables

22. Misc.

22.1 Inline Edit

The **Person Account** page, as shown in **Figure 35** above, is divided into three sections as follows:

- **Constituent Details** – Contains the following fields, which can be edited and updated:
  - **Account Name** – Hover over the field, then click the **Pencil** icon. You can then edit the Constituent name and other information. Then click **Save**.
  - **Phone** – Hover over the field, then click the **Pencil** icon. You can then edit the Constituent's phone number. Then click **Save**.
  - **Spoken Language** – Hover over the field, then click the **Pencil** icon. You can then edit the Constituent's spoken language number. Then click **Save**.
  - **Account Owne**r –. Hover over the field, then click the **Owner** icon. To change the owner, see **Error! Reference source not found.**
  - **Other Language** – Hover over the field, then click the **Pencil** icon. You can then edit the Constituent's other language. Then click **Save**.
- **Constituent Information** – Contains the following fields, which can be edited and updated: See also: **14.3**
  - **EDDCAN** – Click in the field, then enter a nine-digit number. Then click **Save**.
  - **Employer Account Number** – Click in the field, then enter between a seven- and fifteen-digit number. Then click **Save**.
  - **EDD Client Number** – cThen click **Save**.
  - **SSN** (Social Security Number) – Click in the field, then enter a nine-digit number. Then click **Save**.

> **Caution**
>
> To complete the edit and save the **Person Account**, one of the following fields must be completed: **EDDCAN**, **Employer Account Number**, **EDD Client Number**, or **SSN.**

- **System Information, Last Modified By** – Contains the following fields, which can be edited and updated:

Created By, **Last Modified By** – Click either field. The **Staff** member who created the **Person Account**, their page is displayed, where you can view and edit many of the **Account Owners** details.