



EDD Staff Legislative Service Tracker

Version 0.01

10/16/2020

Employment Development Department

3127 Transworld Drive

Suite 150

Stockton

California

95206--4988

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1. Copyright, Trademarks, Notice of Proprietary Rights

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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

Draft

5. Related Documents

Document Name	Description

Table 4: Related Documents

Acronym	Definition

Table 5: Acronyms

Term	Description

Table 6: Glossary

Introduction

Draft

6. Overview

Draft

Getting Started

7. Troubleshooting and Support

Draft

8. Accessing the System

Draft

9. System Organization and Navigation

Draft

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

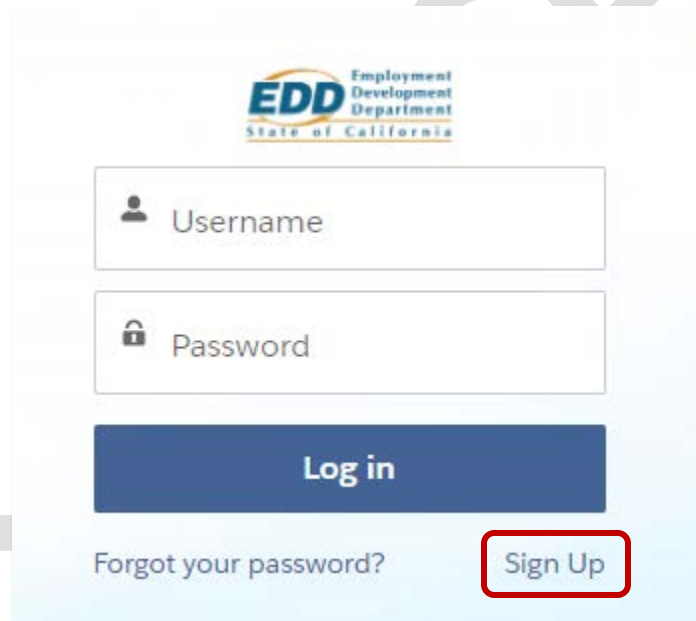
A screenshot of a web-based sign-up dialog box. At the top is the EDD logo with the text 'Employment Development Department State of California'. Below the logo are two input fields: the first is labeled 'Username' with a person icon, and the second is labeled 'Password' with a lock icon. Below these fields is a large blue button labeled 'Log in'. At the bottom left is a link that says 'Forgot your password?'. At the bottom right is a button labeled 'Sign Up' which is highlighted with a red rectangular border.

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 Dialog above.

10.2 Registration

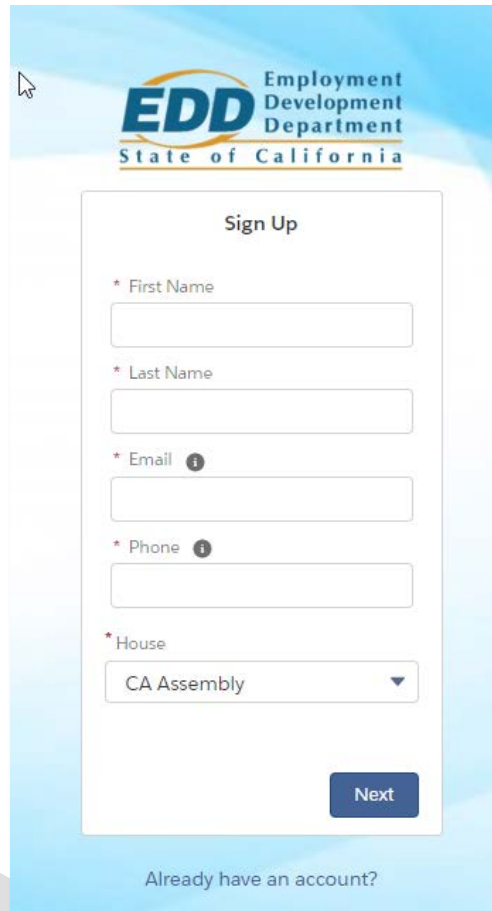
The image shows a 'Sign Up' dialog box from the EDD (Employment Development Department) of the State of California. The dialog box is white with a blue border and a blue header bar containing the EDD logo and the text 'Employment Development Department State of California'. The title 'Sign Up' is centered at the top of the form area. Below the title, there are five required fields, each marked with an asterisk: 'First Name', 'Last Name', 'Email', 'Phone', and 'House'. The 'House' field is a dropdown menu currently showing 'CA Assembly'. Each field has a small information icon (i) to its right. At the bottom right of the form is a blue 'Next' button. Below the form, there is a link that says 'Already have an account?'.

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.

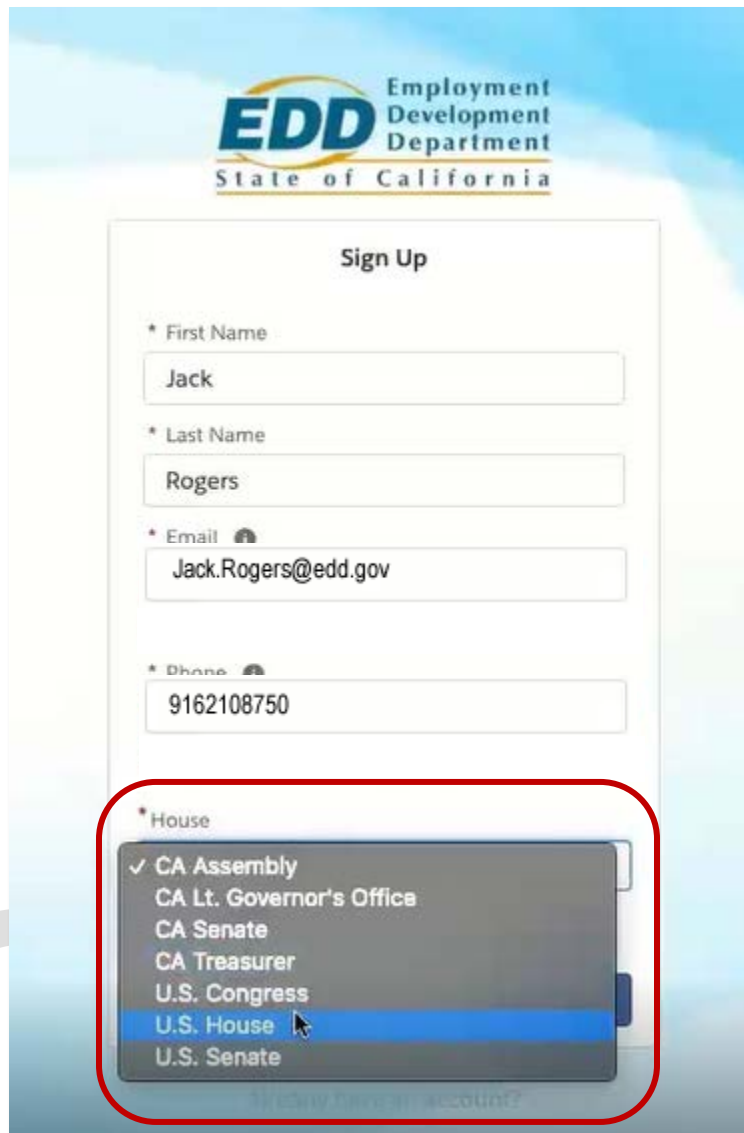
 Note

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.



The screenshot shows the EDD Sign Up form for the State of California. The form includes fields for First Name (Jack), Last Name (Rogers), Email (Jack.Rogers@edd.gov), and Phone (9162108750). The House dropdown menu is open, showing a list of legislative branches: CA Assembly (checked), CA Lt. Governor's Office, CA Senate, CA Treasurer, U.S. Congress, U.S. House (highlighted), and U.S. Senate. A red rounded rectangle highlights the dropdown menu.

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.



EDD Employment Development Department
State of California

EDD Legislative Service Request Tracker - Sign Up

* Legislative Office

✓ Dianne Feinstein's Office
Kamala Harris's Office

Previous Next

Already have an account?

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.

EDD Employment Development Department
State of California

EDD Legislative Service Request Tracker - Sign Up

* Legislative Office

✓ Dianne Feinstein's Office
Kamala Harris's Office

Previous Next

Already have an account?

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.

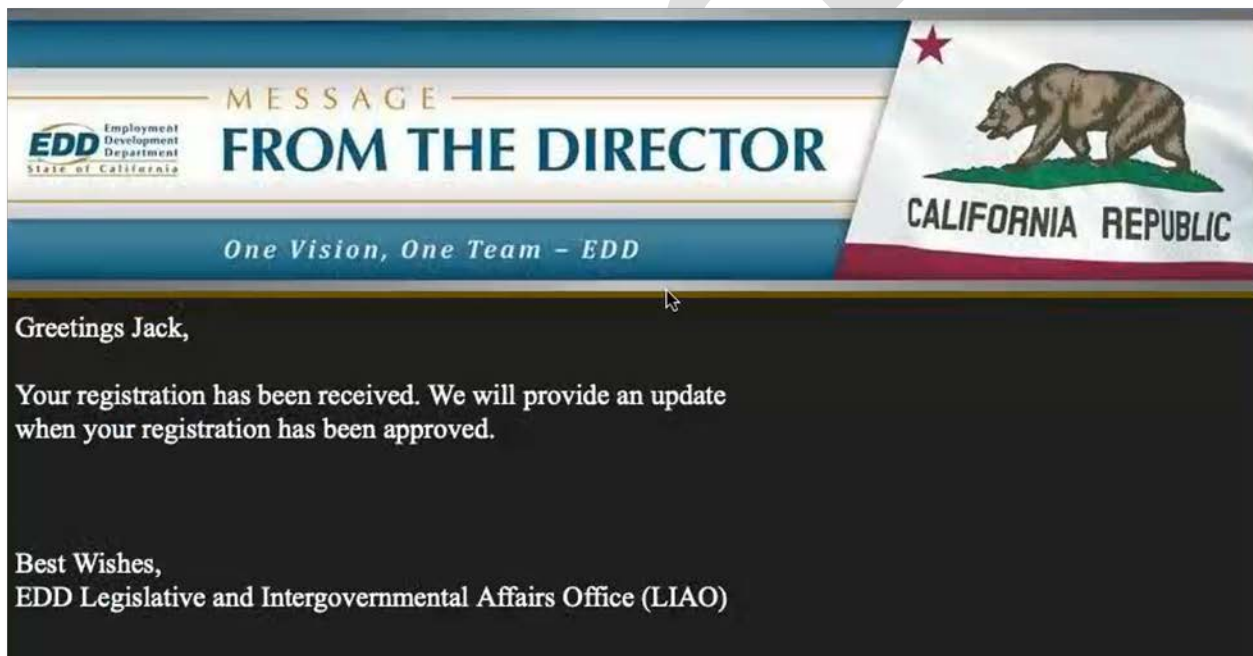


Figure 8: Email, Confirming Receipt of Registration

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

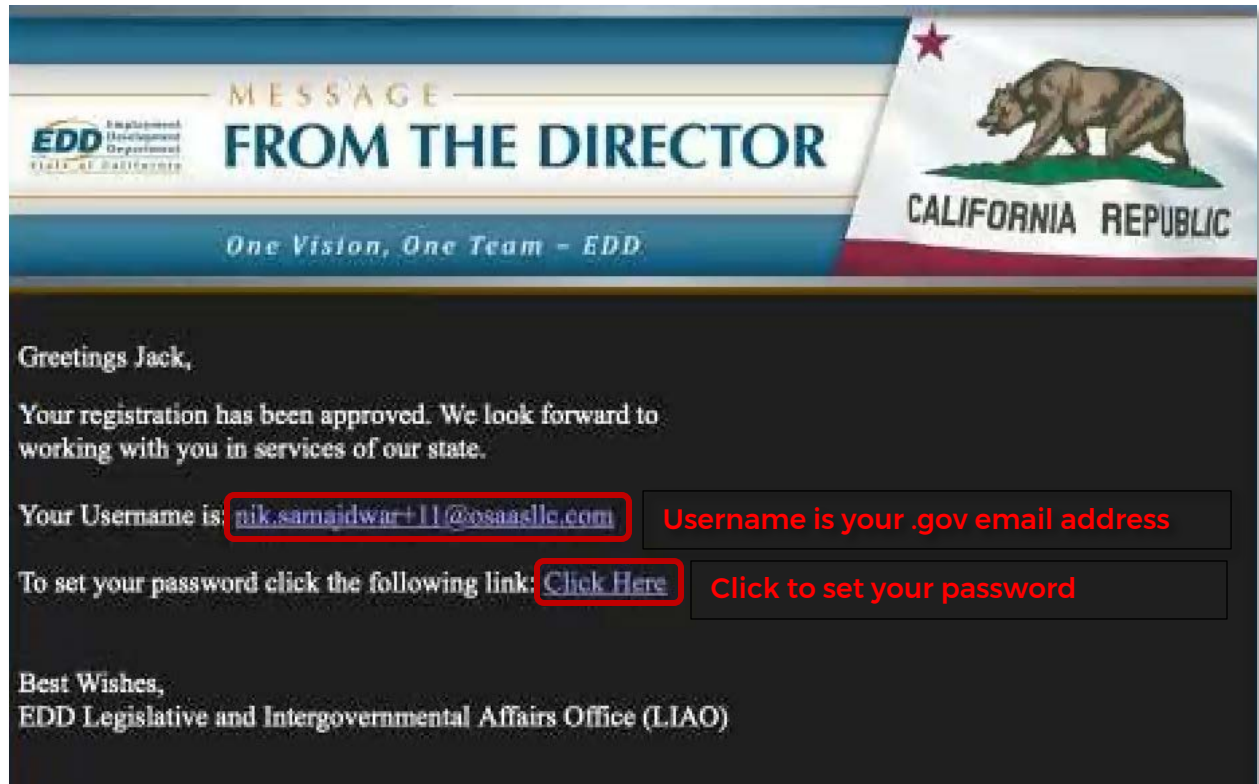


Figure 9: Email, Approved Registration

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** page, 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

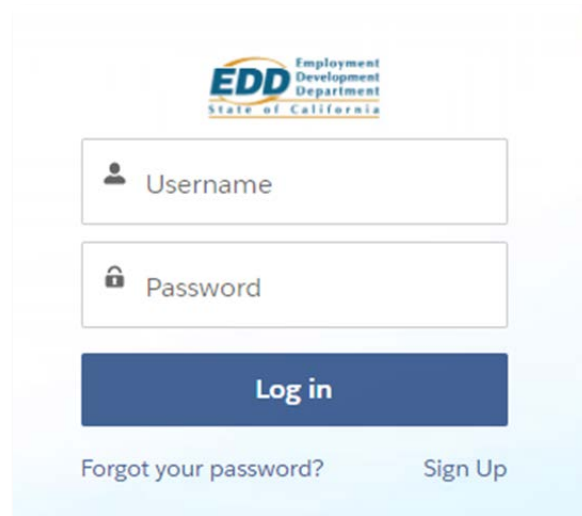
The login dialog box features the EDD logo at the top, which includes the text "EDD Employment Development Department State of California". Below the logo are two input fields: the first is labeled "Username" with a person icon, and the second is labeled "Password" with a lock icon. A blue "Log in" button is positioned below these fields. At the bottom of the dialog, there are two links: "Forgot your password?" and "Sign Up".

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

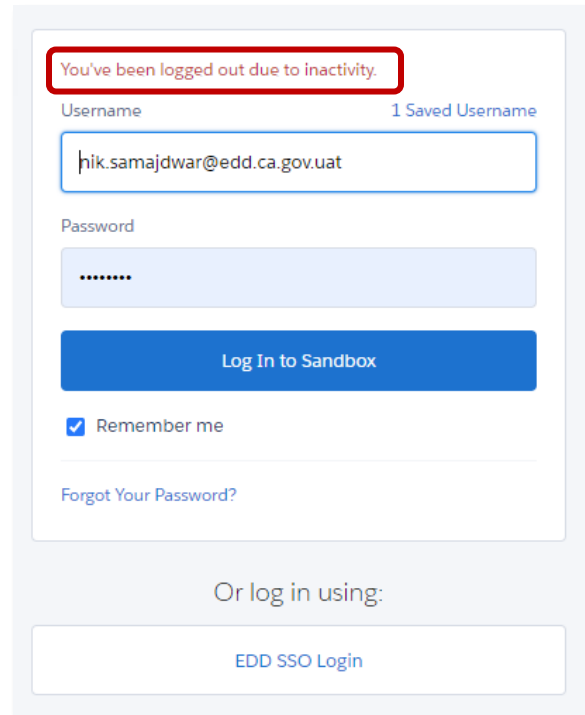


Figure 14: Log out Due to Inactivity

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

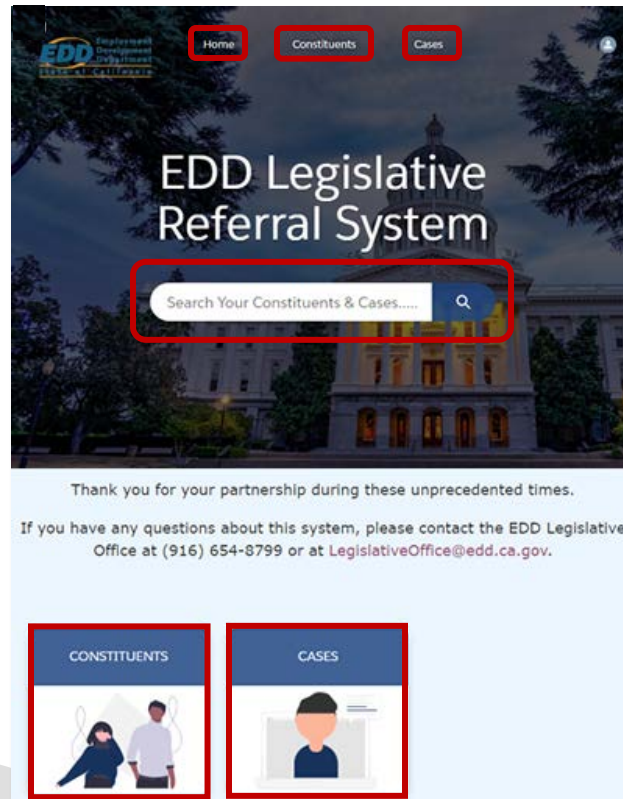


Figure 15: Landing Page

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.

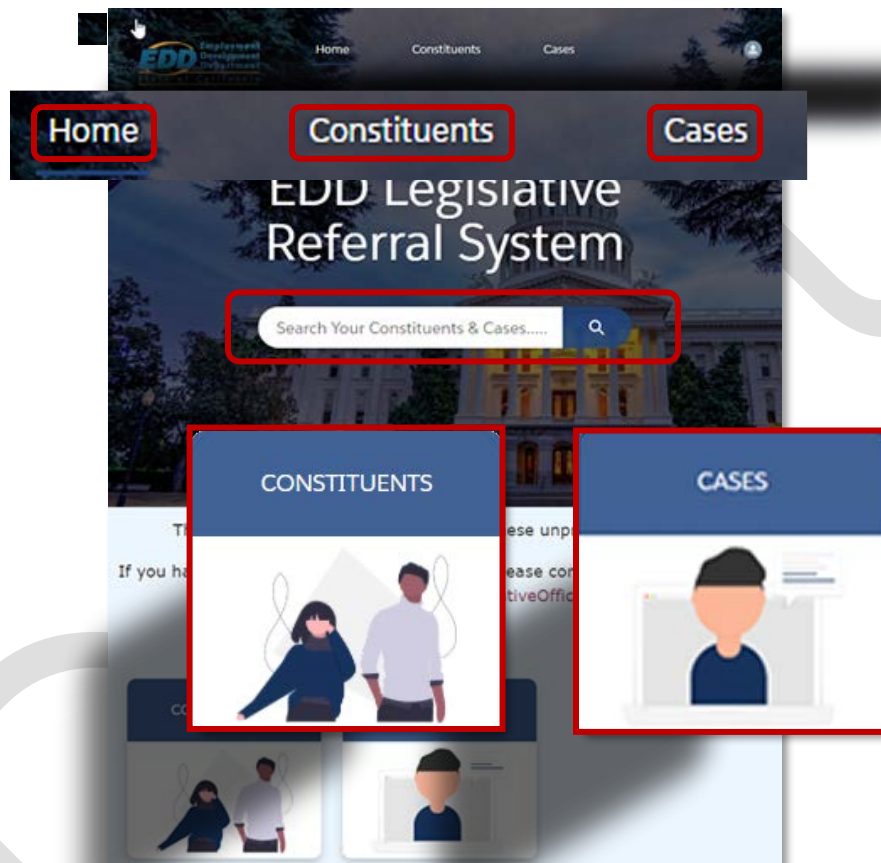


Figure 16: Landing Page Hyperlinks

12.2 Landing Page Hyperlinks

- **Home** – This directs you to the **Landing** page shown in [Figure 15](#): Landing Page above.
- **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.

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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.

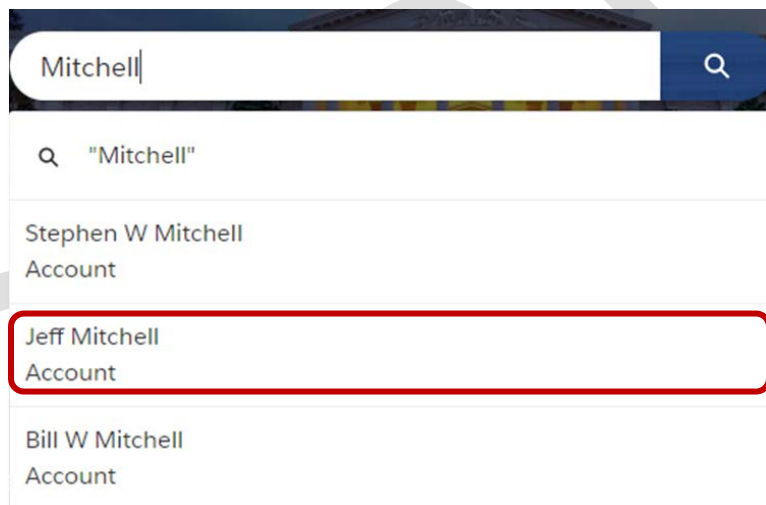


Figure 18: Search Bar Results

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 Page](#) below. 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.

Person Account
Jeff Mitchell

+ Follow Edit Printable View

EDD... EDD Client Nu... Employer Account N... SSN ***** S

CONSTITUENT DETAIL...

Account Name: Jeff Mitchell

Account Owner: Stephen Mitchell

Phone:

Spoken Language:

Other Language:

✓ Constituent Information

EDDCAN:

EDD Client Number:

Employer Account Number:

SSN: *****

✓ System Information

Created By: Stephen Mitchell, 9/25/2020, 7:20 AM

Last Modified By: Stephen Mitchell, 10/6/2020, 1:58 PM

Cases (0) New

Figure 19: Constituent Results: Account Page

Search Results

All

Discussi... 1

Cases

Groups

Cases

3 Results · Sorted by Relevance ▾

CASE NUMBER	CONTACT NAME	CATEGORY	SUB-CATEGORY
00001070	Tom Jones	Unemployment Insurance	Backdate Request
00001082	41 ywwxwwm wfyzyhwhz	Unemployment Insurance	Missing Payment
00001110	Hunter Gray	Unemployment Insurance	Missing Payment

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.

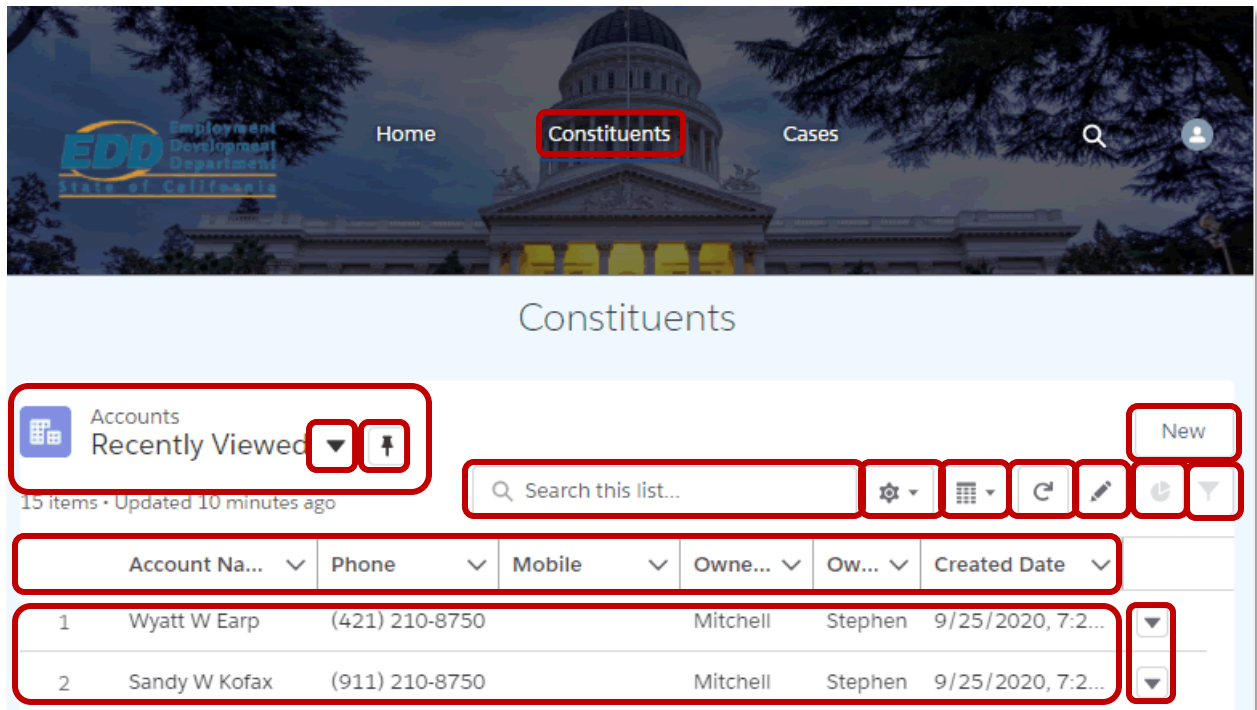


Figure 21: Constituents Page, Recently Viewed

13.2 Accounts Drop-down Control

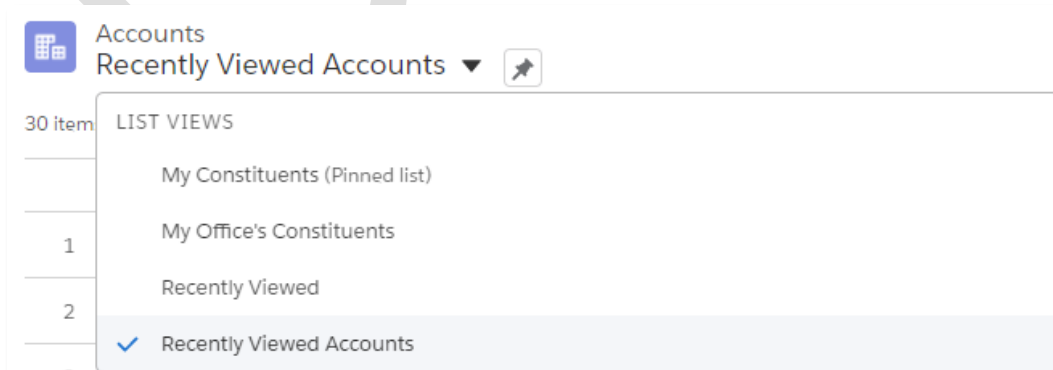
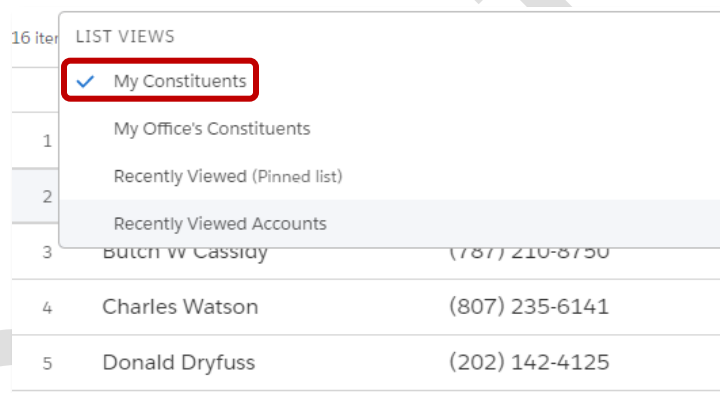


Figure 22: Constituents Account Drop- down

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.



LIST VIEWS	
✓	My Constituents
	My Office's Constituents
	Recently Viewed (Pinned list)
	Recently Viewed Accounts
3	Butch W Cassidy (787) 210-8750
4	Charles Watson (807) 235-6141
5	Donald Dryfuss (202) 142-4125

Figure 23: My Constituents List

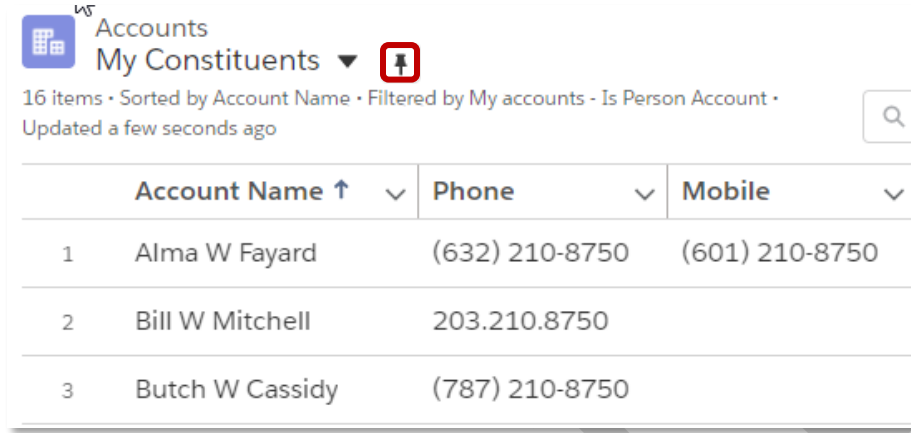
- **My Office's Constituents** – Displays the **Constituents** list available to all staff members of your office, as shown in [Figure 24](#) below.



LIST VIEWS	
✓	My Office's Constituents
	Recently Viewed (Pinned list)
	Recently Viewed Accounts
3	15 Jonathan Smith
4	2 Sandy W Gray
5	20 Stephen W Mitchell

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.



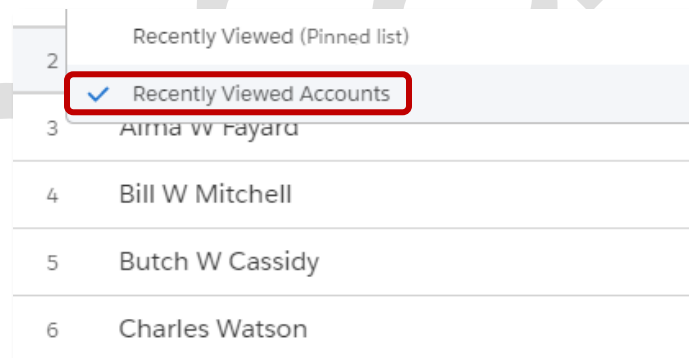
Accounts
My Constituents ▼ 

16 items • Sorted by Account Name • Filtered by My accounts - Is Person Account •
Updated a few seconds ago

	Account Name ↑ ▼	Phone ▼	Mobile ▼
1	Alma W Fayard	(632) 210-8750	(601) 210-8750
2	Bill W Mitchell	203.210.8750	
3	Butch W Cassidy	(787) 210-8750	

Figure 25: Pin List

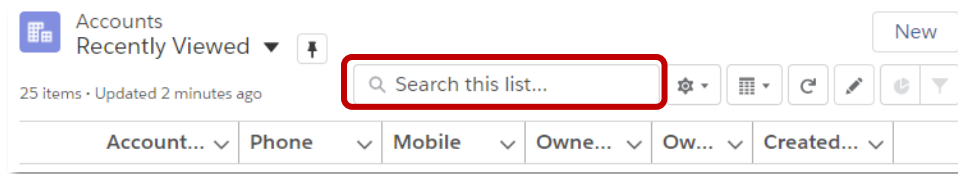
- **Recently Viewed Accounts** – When you are working with several constituents and their cases, the constituents' you were working on will display at the top of the constituents list when you choose the **Recently View Accounts** list, as in [Figure 26](#). below.



	Recently Viewed (Pinned list)
2	Recently Viewed Accounts
3	Alma W Fayard
4	Bill W Mitchell
5	Butch W Cassidy
6	Charles Watson

Figure 26: Recently Viewed Account

13.3 Searching the Constituent List



The screenshot shows the 'Accounts' section with a 'Recently Viewed' filter. A search bar labeled 'Search this list...' is highlighted with a red box. Below the search bar are several filter buttons: 'Account...', 'Phone', 'Mobile', 'Owne...', 'Ow...', and 'Created...'. The interface also shows '25 items' and 'Updated 2 minutes ago'.

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 Charts, Filter

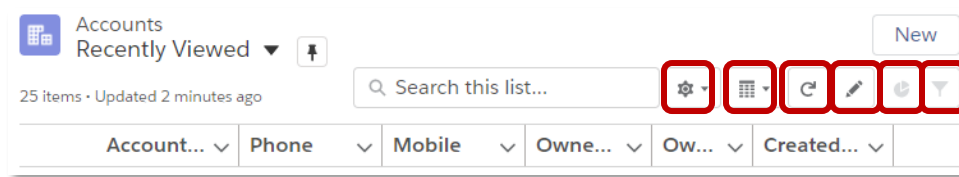


Figure 29: Accounts: Controls

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

Accounts
Recently Viewed Accounts ▾ ↗

15 items • Sorted by Account Name •
Filtered by Recently Viewed • Updated 6 minutes ago

Search this list...

Account Name ↑ ▾ Billin... ▾ Phone ▾ Type ▾ Acco... ▾

1	Adam Gray				
2	Alma W Fayard	(632) 210-8750	SMit		
3	Bill W Mitchell	203.210.8750	SMit		

Figure 30: Constituent List View Column Headers

13.6 Sorting Constituent List Column Headers

Accounts
Recently Viewed Accounts ▾ ↗

15 items • Sorted by Account Name •
Filtered by Recently Viewed • Updated 6 minutes ago

Search this list...

Account Name ↑ ▾ Billin... ▾ Phone ▾ Type ▾ Acco... ▾

1	Adam Gray				
2	Alma W Fayard	(632) 210-8750	SMit		
3	Bill W Mitchell	203.210.8750	SMit		

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

New Account: Constituent

Account Information

* Account Name

Salutation
--None--

First Name

Middle Name

* Last Name

Phone

Spoken Language
--None--

Other Language

Account Owner
Stephen Mitchell

Constituent Information

EDDCAN

Employer Account Number

EDD Client Number ⓘ

SSN

Cancel Save & New Save

Figure 33: New Constituent Page

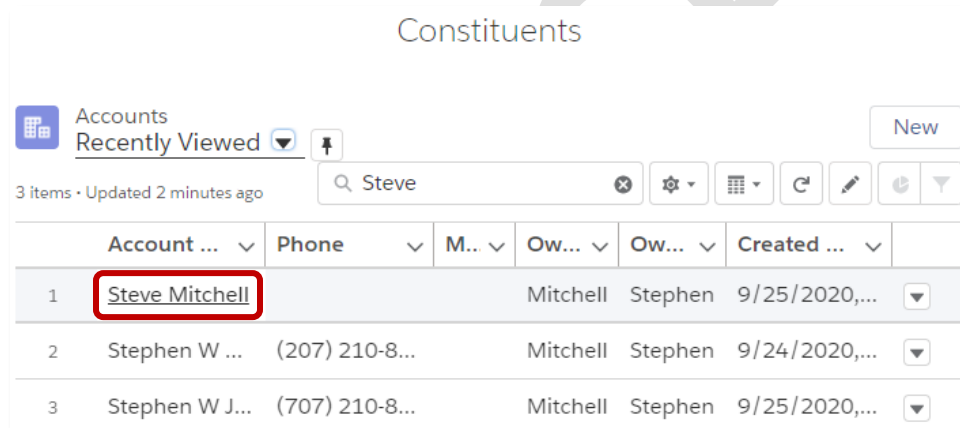
Creating a **New** constituent is discussed later in another section of this guide. See also: [15](#).

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:

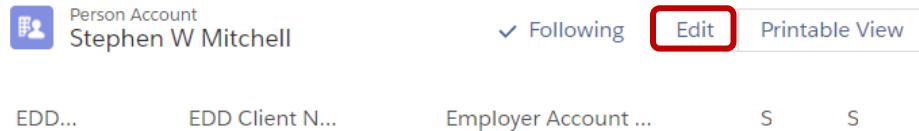


	Account ...	Phone	M..	Ow...	Ow...	Created ...
1	Steve Mitchell			Mitchell	Stephen	9/25/2020,...
2	Stephen W ...	(207) 210-8...		Mitchell	Stephen	9/24/2020,...
3	Stephen W J...	(707) 210-8...		Mitchell	Stephen	9/25/2020,...

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.



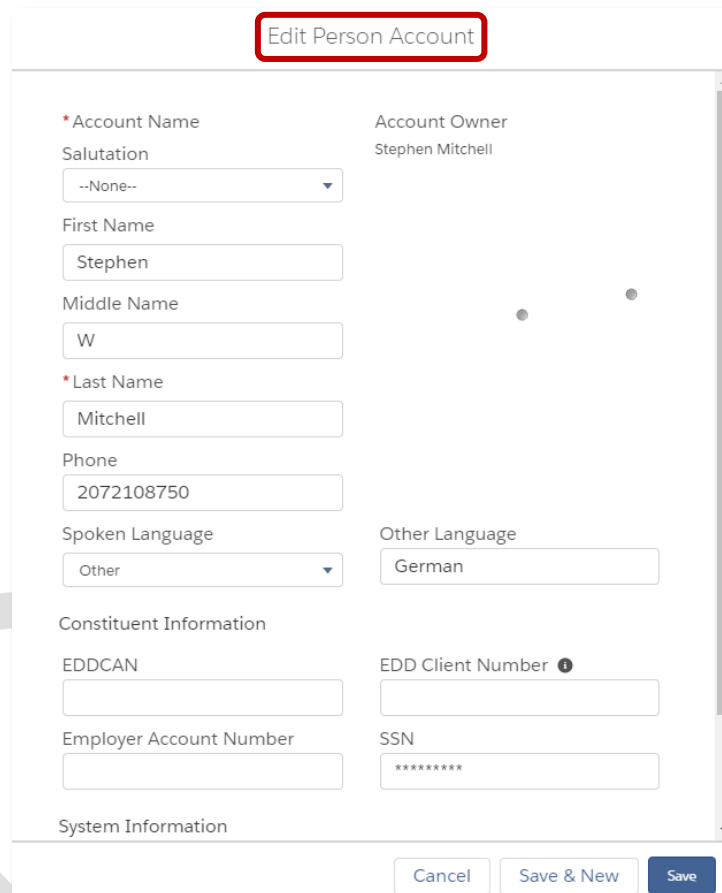
Person Account
Stephen W Mitchell

✓ Following **Edit** Printable View

EDD... EDD Client N... Employer Account ... S S

Figure 35: Person Account Page

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



Edit Person Account

* Account Name Account Owner
Stephen Mitchell

Salutation
--None--

First Name
Stephen

Middle Name
W

* Last Name
Mitchell

Phone
2072108750

Spoken Language
Other

Other Language
German

Constituent Information

EDDCAN
EDD Client Number ⓘ

Employer Account Number
SSN

System Information

Cancel Save & New Save

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.
 - o **First Name**
 - o **Middle Name**
 - o **Last Name**
 - o **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

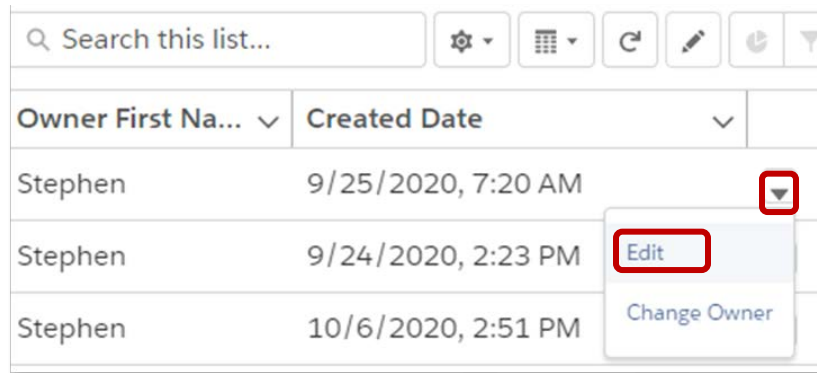
7. **EDDCAN** – Click in the field, then enter a nine-digit number.
8. **EDD Client Number** – Click in the field, then enter between a seven- and fifteen-digit number.
9. **Employer Account Number** – Click in the field, then enter a nine-digit number.
10. **SSN (Social Security Number)** – Click in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



The screenshot shows a table with two columns: 'Owner First Na...' and 'Created Date'. There are three rows of data, all with the name 'Stephen'. The first row has a date '9/25/2020, 7:20 AM'. A red box highlights a dropdown arrow in the first row. The second row has a date '9/24/2020, 2:23 PM'. A red box highlights an 'Edit' button in the second row. The third row has a date '10/6/2020, 2:51 PM'. A red box highlights a 'Change Owner' button in the third row. The table has a search bar at the top and several icons for filtering and sorting.

Owner First Na... ▾	Created Date ▾
Stephen	9/25/2020, 7:20 AM
Stephen	9/24/2020, 2:23 PM
Stephen	10/6/2020, 2:51 PM

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

Edit Person Account

*Account Name
Salutation: --None--
First Name: Jeff
Middle Name:
*Last Name: Mitchell
Phone:
Spoken Language: --None--
Other Language:
Constituent Information
EDDCAN:
Employer Account Number:
System Information
Account Owner: Stephen Mitchell
EDD Client Number:
SSN: *****
Buttons: Cancel, Save & New, Save

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

Search this list...		⚙	📊	↺	✎	📅	🔍
Owner First Na... ▾	Created Date ▾						
Stephen	9/25/2020, 7:20 AM						
Stephen	9/24/2020, 2:23 PM						
Stephen	10/6/2020, 2:51 PM						

Figure 39: Change Owner of the Person Account.

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

Constituents

Accounts
Recently Viewed ▼

25 items • Updated 4 minutes ago

Search this list...

	Account... ▼	Phone ▼	Mobile ▼	Owne... ▼	Ow... ▼	Created ... ▼
1	Stephen W...	(207) 210-...		Mitchell	Stephen	9/24/202...
2	Steve Mitc...	(207) 210-...		Mitchell	Stephen	9/25/202...

Figure 40: : Cinstituent List

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

New Account: Constituent

Account Information

* Account Name

Salutation

--None--

First Name

Middle Name

* Last Name

Phone

Spoken Language

--None--

Other Language

Account Owner

Stephen Mitchell

Cancel Save & New Save

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.
 - o **First Name**
 - o **Middle Name**
 - o **Last Name**
 - o **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.

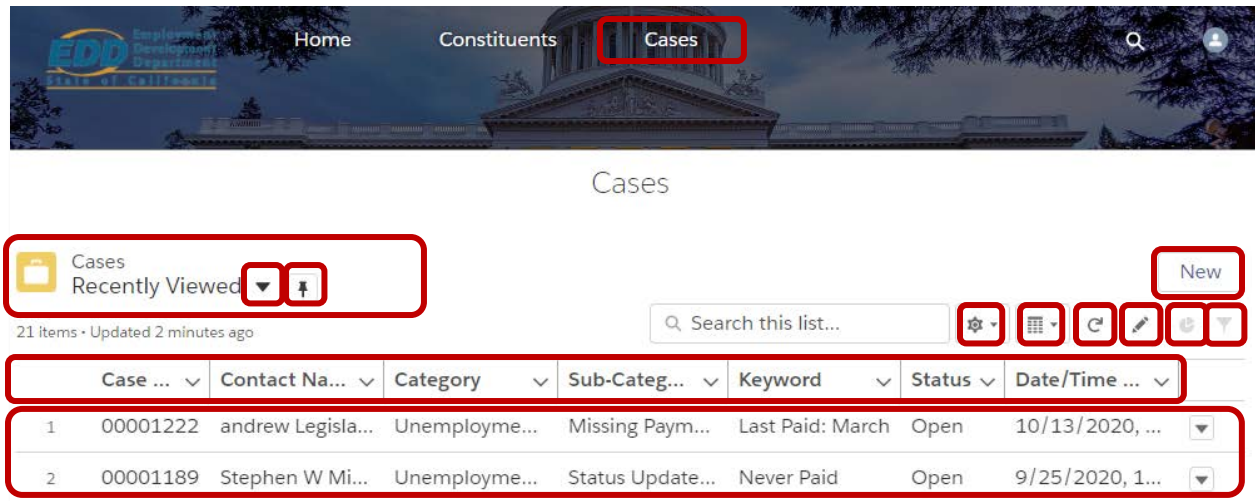


Figure 42: Cases Page, Recently Viewed

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.

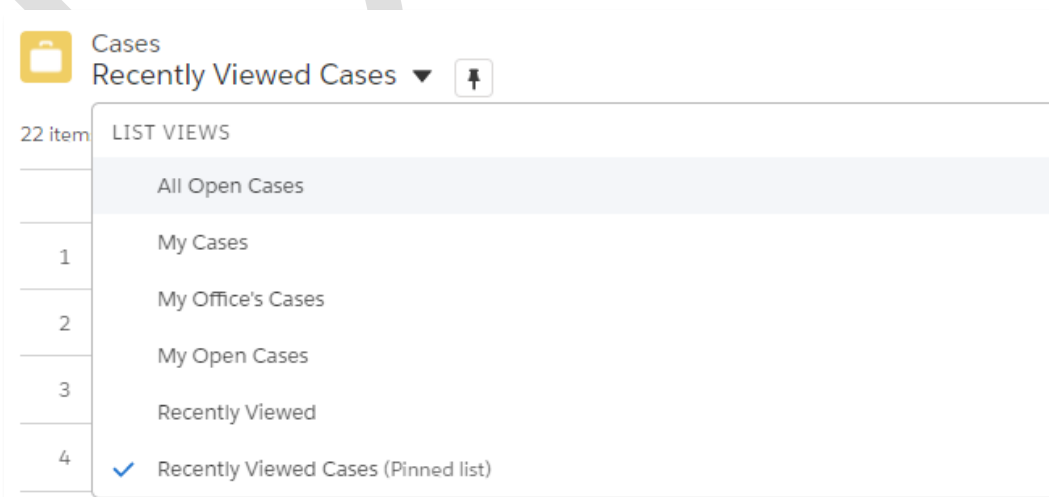


Figure 43: Cases Dropdown Control

- **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.

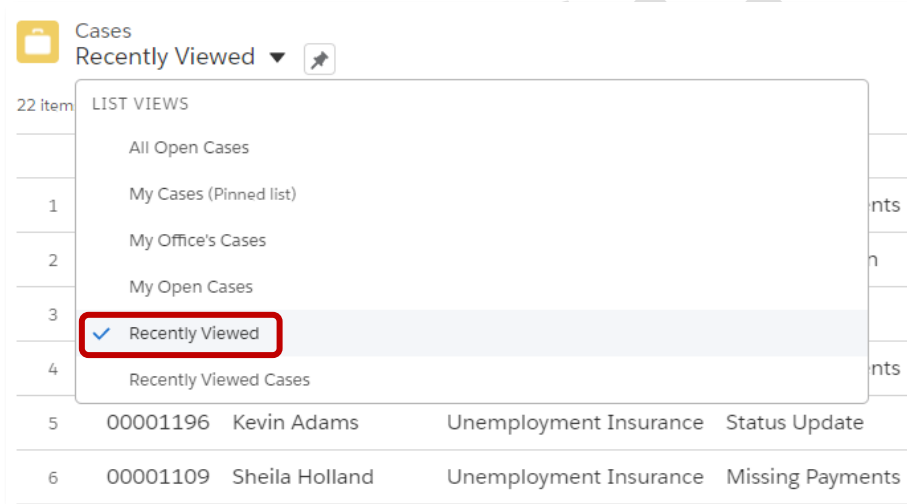


Figure 44: Recently Viewed Drop-down

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

Cases			
My Open Cases ▼			
0 items			
LIST VIEWS			
All Open Cases			
1	☒	My Cases (Pinned list)	
2	☐	My Office's Cases	
3	☐	My Open Cases	
4	Recently Viewed		
5	☐	00001220	Jackson Browne
6	☐	00001219	Stephen W Jones
7	☐	00001218	Sheila Holland
8	☐	00001217	Kevin Adams
9	☐	00001215	Quinn Buniel
10	☐	00001214	Quinn Buniel
11	☐		

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.

Cases			
All Open Cases ▼			
50+ iter			
LIST VIEWS			
All Open Cases			
1	☒	My Cases	
2	☐	My Office's Cases	
3	☐	My Open Cases	
6	☐	00001134	Quinn A Buniel
7	☐	00001137	Quinn A Buniel
8	☐	00001149	Bob Saget

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.

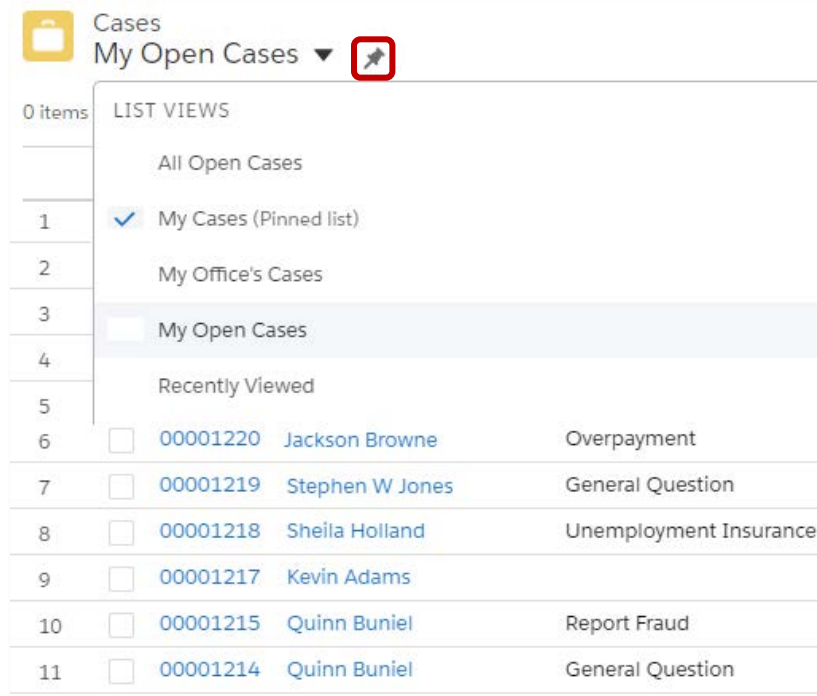


Figure 47: Cases: My Open Cases

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

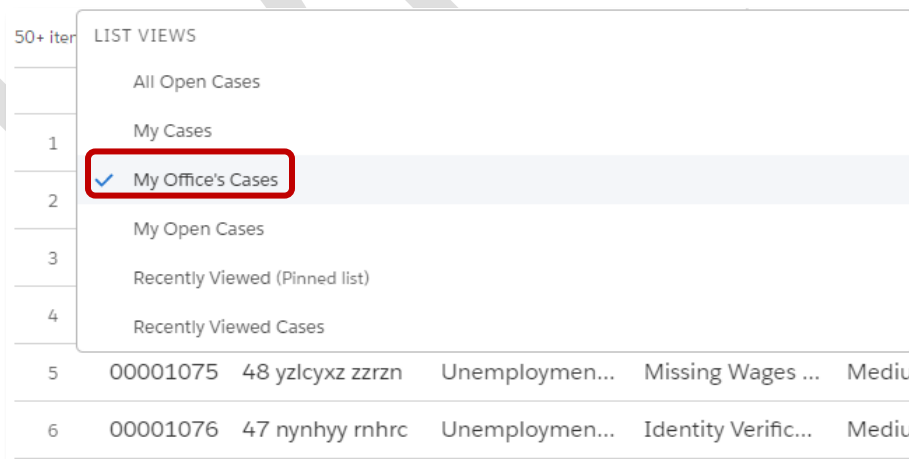


Figure 48: My Office's Constituents List

- **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.

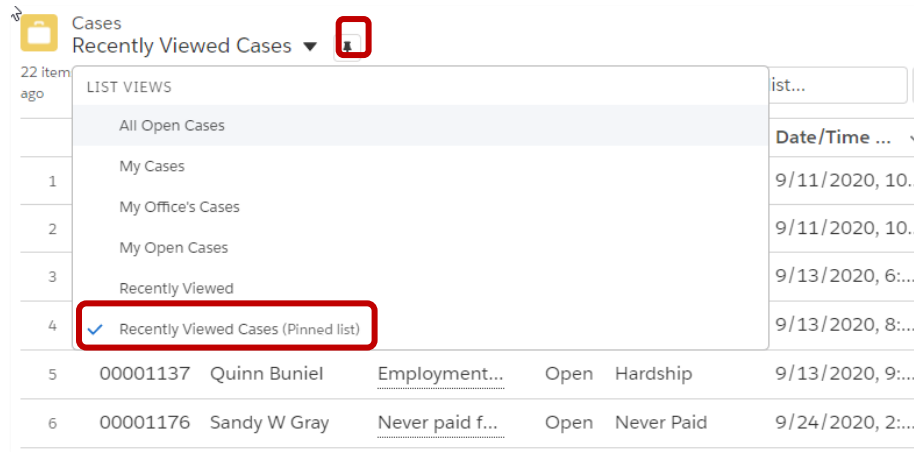


Figure 49: Recently Viewed Pinned List

- **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.

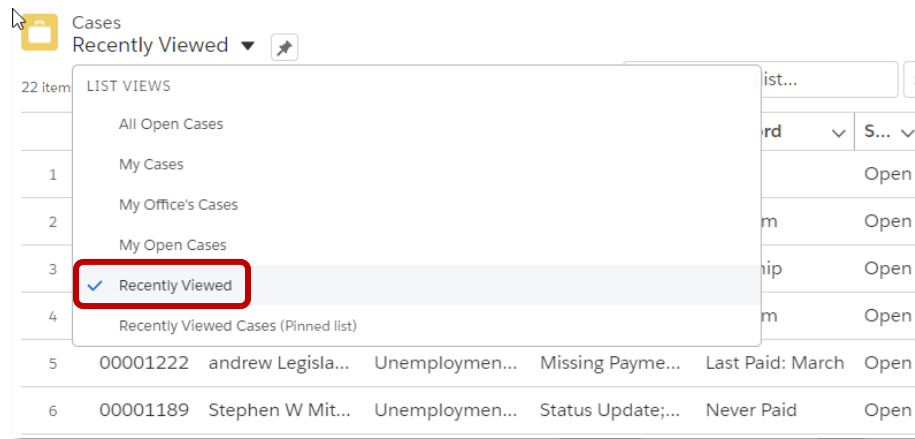
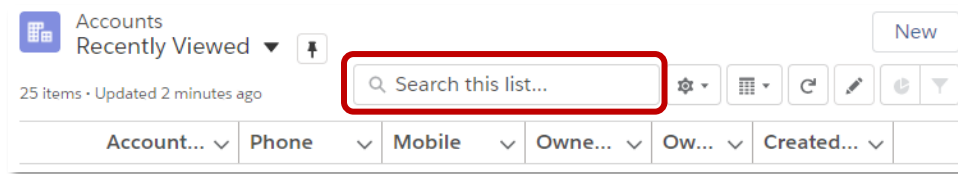


Figure 50: Recently Viewed List

16.3 Searching the Case List



Accounts
Recently Viewed ▾

25 items • Updated 2 minutes ago

Search this list...

Account... ▾ Phone ▾ Mobile ▾ Owne... ▾ Ow... ▾ Created... ▾

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.

	Cas... ↑ ▾	Contact Na... ▾	Category ▾	S... ▾	K... ▾	S... ▾	Date/Time ... ▾
1	00001187	Stephen W Mi...	Unemployme...	N/A	Open	9/25/2020, 1...	▾

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.

	Cas... ↑ ▾	Contact Na... ▾	Category ▾	S... ▾
1	00001070	Tom Jones	Unemployment Insurance	Bac...
2	00001074	Nancy Roberts	Unemployment Insurance	Ide...
3	00001076	Mitch Stevens	Unemployment Insurance	Ide...

Figure 53 Case Search: Results by Category

As 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 Charts, Filter

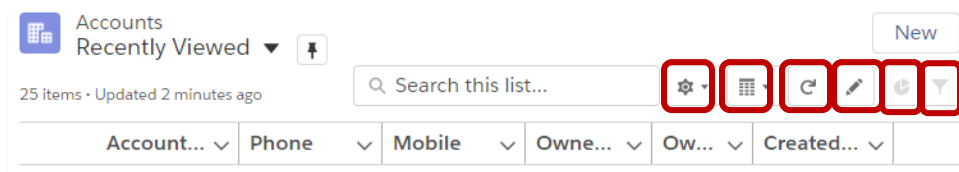


Figure 54: Accounts: Controls

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.

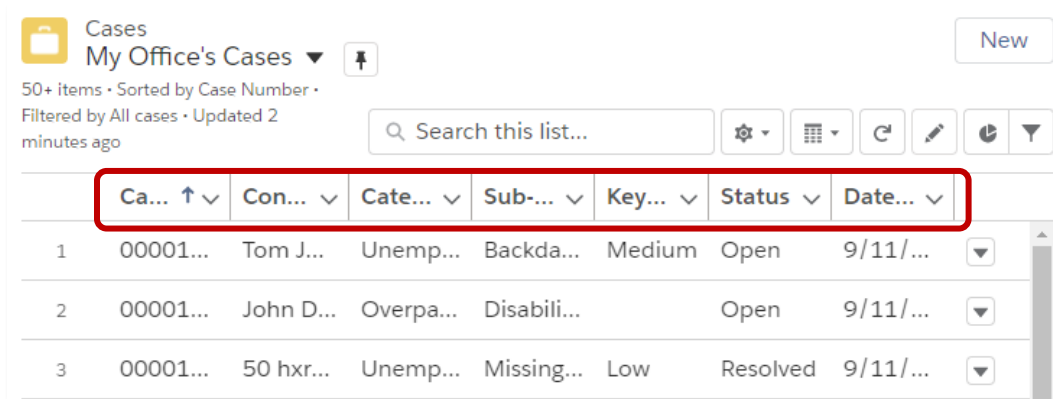
The **Show Charts** control  currently does not have any charts configured.

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.



Cases
My Office's Cases ▼

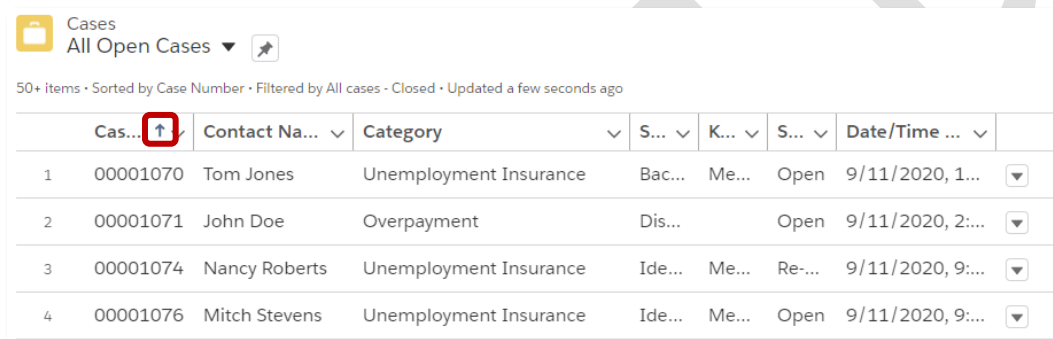
50+ items • Sorted by Case Number • Filtered by All cases • Updated 2 minutes ago

Search this list...

	Cas... ↑▼	Con... ▼	Cate... ▼	Sub-... ▼	Key... ▼	Status ▼	Date... ▼
1	00001...	Tom J...	Unemp...	Backda...	Medium	Open	9/11/...
2	00001...	John D...	Overpa...	Disabili...		Open	9/11/...
3	00001...	50 hxr...	Unemp...	Missing...	Low	Resolved	9/11/...

Figure 55: Case List: List Column Headers

16.6 Sorting Case List Column Headers



Cases
All Open Cases ▼

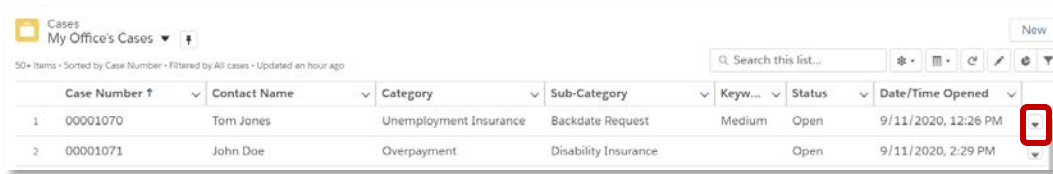
50+ items • Sorted by Case Number • Filtered by All cases • Closed • Updated a few seconds ago

	Cas... ↑▼	Contact Na... ▼	Category ▼	S... ▼	K... ▼	S... ▼	Date/Time ... ▼
1	00001070	Tom Jones	Unemployment Insurance	Bac...	Me...	Open	9/11/2020, 1...
2	00001071	John Doe	Overpayment	Dis...		Open	9/11/2020, 2...
3	00001074	Nancy Roberts	Unemployment Insurance	Ide...	Me...	Re...	9/11/2020, 9...
4	00001076	Mitch Stevens	Unemployment Insurance	Ide...	Me...	Open	9/11/2020, 9...

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



	Case Number ↑	Contact Name	Category	Sub-Category	Keyw...	Status	Date/Time Opened
1	00001070	Tom Jones	Unemployment Insurance	Backdate Request	Medium	Open	9/11/2020, 12:26 PM
2	00001071	John Doe	Overpayment	Disability Insurance		Open	9/11/2020, 2:29 PM

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.

Global Eagle

Edit 00001070

Case Information

Case Number
00001070

Case Origin
Email

* Status
Open

* Keyword
Medium

Description Information

Subject
I need some help backdating my unemployment

* Constituent's Issue
I need some help backdating my unemployment insurance

Category Information

* Category

Cancel Save & New Save

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:
 - o **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.
 - o **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 **Sub 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.

*** Category**

Unemployment Insurance

[View all dependencies](#)

*** Sub-Category**

Available

- Disqualification
- Identity Verification
- Backdate Request
- EDDCAN Request

[View all dependencies](#)

Chosen

- Claim Filing Needed
- Status Update
- Missing Payments

Figure 59: Edit Case: Sub-Category

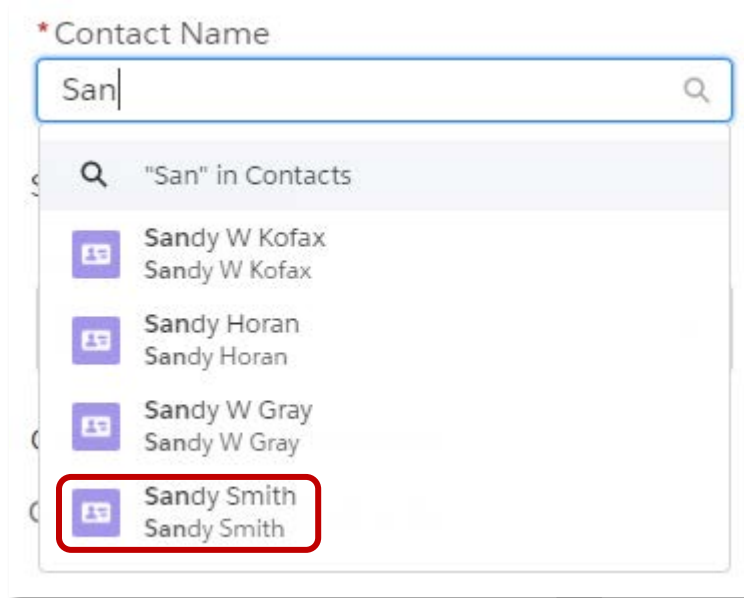
- **Constituent Information** – Contains the following fields:
 - o **Contact Name** – Is the Constituent's name.
9. This field defaults to the Constituent of whom the case was initially filed. In the event, you may want to file the case with a different Constituent, click the **X** in the **Contact 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.

Constituent Information

*** Contact Name**

 Stephen W Mitchell 

Figure 60: Edit Case: Contact Name



* Contact Name

San

Q "San" in Contacts

Sandy W Kofax
Sandy W Kofax

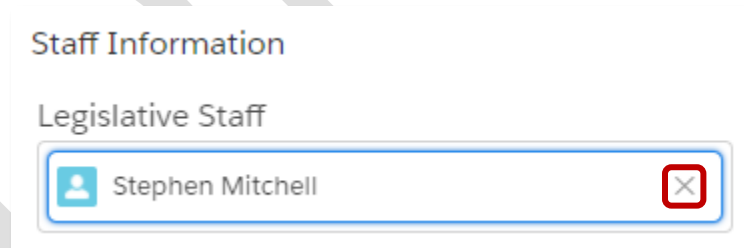
Sandy Horan
Sandy Horan

Sandy W Gray
Sandy W Gray

Sandy Smith
Sandy Smith

Figure 61: Edit Case: Search Contact Name

- o **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.

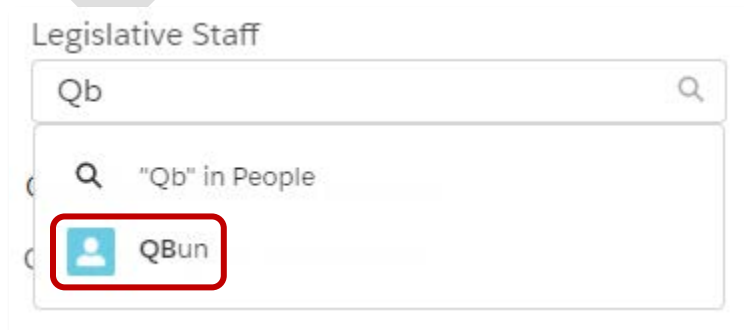


Staff Information

Legislative Staff

Stephen Mitchell

Figure 62: Edit Case: Legislative Staff Member



Legislative Staff

Qb

Q "Qb" in People

QBun

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.

Draft

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.

CONSTITUENT DETAILS	
Account Name Stephen W Mitchell	Account Owner Stephen Mitchell
Phone (207) 210-8750	
Spoken Language Other	Other Language German
▼ Constituent Information	

Cases (4)		New	
C...	Co...	Su...	Ke...
O...	Ste...	Sin...	Ne...
O...	Ste...	My...	N/A
O...	Ste...	Wh...	N/A
O...	Sa...	Ne...	Ne...

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.

Edit 00001189

Case Information

Case Number: 00001189

Case Origin:

* Status: Open

* Keyword: Never Paid

Description Information

Subject: Since UI online doesn't work, I filed a paper claim and mailed it, w

* Constituent's Issue: Since UI online doesn't work, I filed a paper claim and mailed it, was it received?

Category Information

* Category: Unemployment Insurance

[View all dependencies](#)

* Sub-Category:

Cancel Save & New Save

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:
 - o **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.

- o **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:
 - o **Subject**
 - 7. In the **Subject** field, you may want to edit the brief description of the Constituent's issue.
 - o **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:
 - o **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.
 - o **Sub – Category** – Is the secondary or subordinate division of the **Category** field.
 - 10. In editing the **Sub-Category**, not all categories will populate the **Sub 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.

*** Category**

Unemployment Insurance

[View all dependencies](#)

*** Sub-Category**

Available

- Disqualification
- Identity Verification
- Backdate Request
- EDDCAN Request

[View all dependencies](#)

Chosen

- Claim Filing Needed
- Status Update
- Missing Payments

Figure 66: Edit Case: Sub-Category

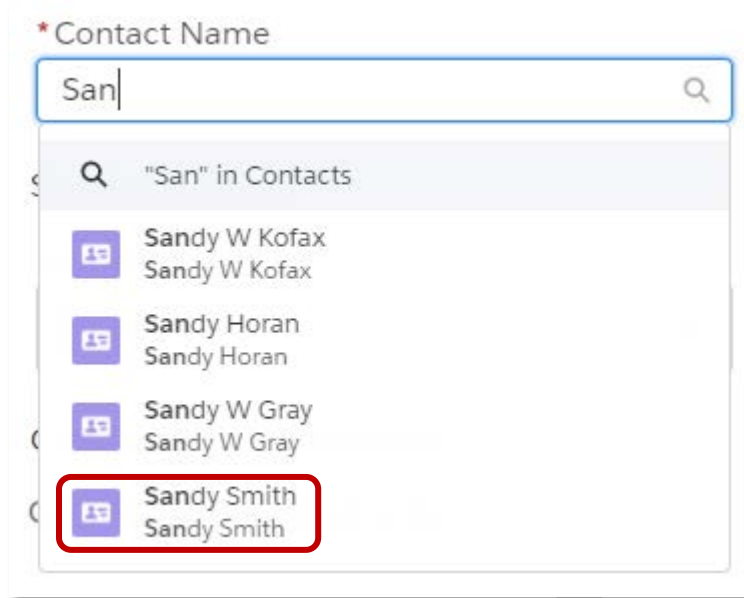
- **Constituent Information** – Contains the following fields:
 - o **Contact Name** – Is the Constituent's name.
 12. This field defaults to the Constituent of whom the case was initially filed. In the event, you may want to file the case with a different Constituent, click the **X** in the **Contact 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.

Constituent Information

*** Contact Name**

 Stephen W Mitchell 

Figure 67: Edit Case: Contact Name



* Contact Name

San

Q "San" in Contacts

Sandy W Kofax
Sandy W Kofax

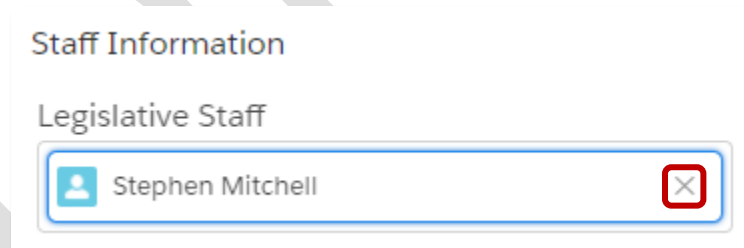
Sandy Horan
Sandy Horan

Sandy W Gray
Sandy W Gray

Sandy Smith
Sandy Smith

Figure 68: Edit Case: Search Contact Name

- o **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.

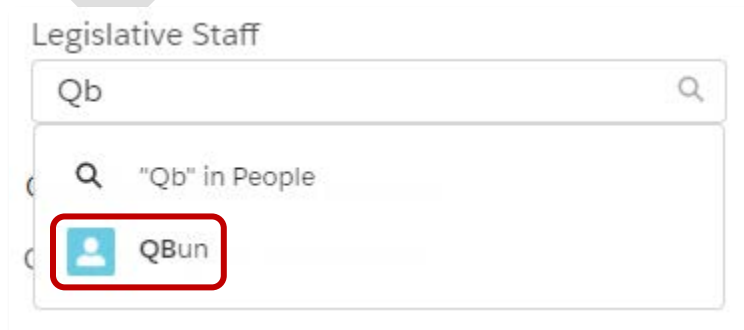


Staff Information

Legislative Staff

Stephen Mitchell

Figure 69: Edit Case: Legislative Staff Member



Legislative Staff

Qb

Q "Qb" in People

QBun

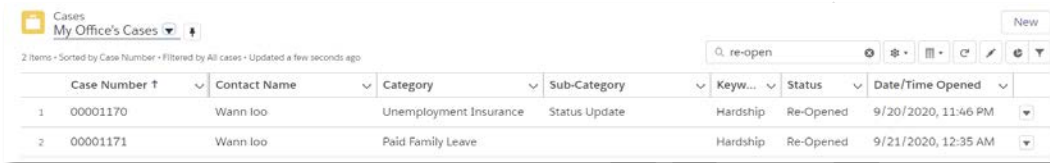
Figure 70: Edit Case: Search Legislative Staff Member

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.

Draft

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

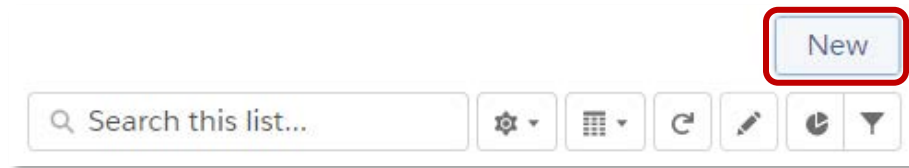


Figure 72: New Case: Inquiry

A screenshot of the 'New Case: Inquiry' form. The title 'New Case: Inquiry' is at the top, enclosed in a red box. The form is divided into several sections: 'Case Information' with fields for 'Case Number' and 'Case Origin'; '* Status' with a dropdown menu showing 'Open'; '* Keyword' with a dropdown menu showing 'N/A'; 'Description Information' with a 'Subject' text field and a '* Constituent's Issue' text area; and 'Category Information' with a '* Category' dropdown. At the bottom right, there are three buttons: 'Cancel', 'Save & New', and 'Save'.

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 the [16.2](#) 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.

Case	Con...	Subj...	Key...	
00...	Step...	Sinc...	N/A	▼
00...	Step...	My i...	N/A	▼
00...	Step...	Why...	N/A	▼
00...	Step...	Nev...	Nev...	▼

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.

Case Information

Case Number: 00001189

Case Origin: [Dropdown]

* Status: Open [Dropdown]

* Keyword: Never Paid [Dropdown]

Description Information

Subject: Since UI online doesn't work, I filed a paper claim and mailed it, was it received? 1189

Constituent's Issue: Since UI online doesn't work, I filed a paper claim and mailed it, was it received?

Category Information

* Category: Unemployment Insurance [Dropdown]

View all dependencies

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** the 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.

*** Category**

Unemployment Insurance

[View all dependencies](#)*** Sub-Category**

Available

Disqualification
Identity Verification
Backdate Request
EDDCAN Request

[View all dependencies](#)

Chosen

Claim Filing Needed
Status Update
Missing Payments

Figure 76: Edit Case: Sub-Category

17.2 Edit and Update Contact Name

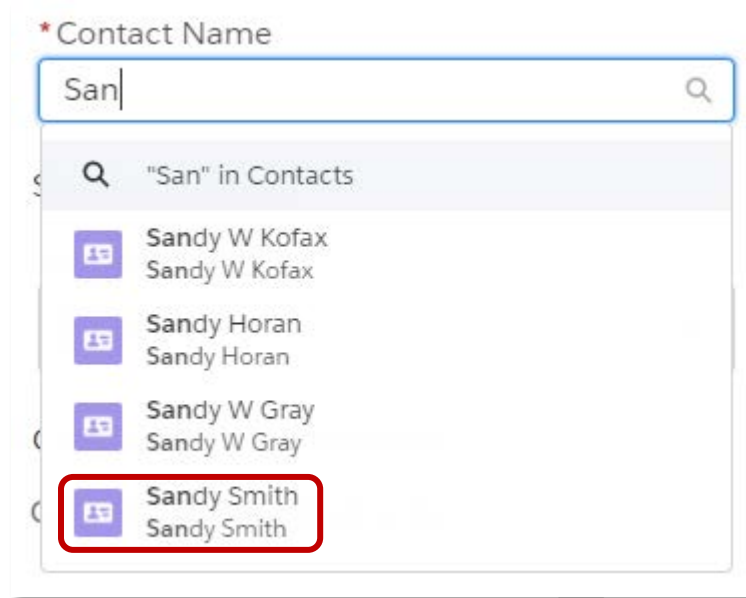
- **Constituent Information** – Contains the following fields:
 - o **Contact Name** – Is the Constituent's name.
10. This field defaults to the Constituent of whom the case was initially filed. In the event, you may want to file the case with a different Constituent, click the **X** in the **Contact 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.

Constituent Information*** Contact Name**

Stephen W Mitchell



Figure 77: Edit Case: Contact Name



* Contact Name

San

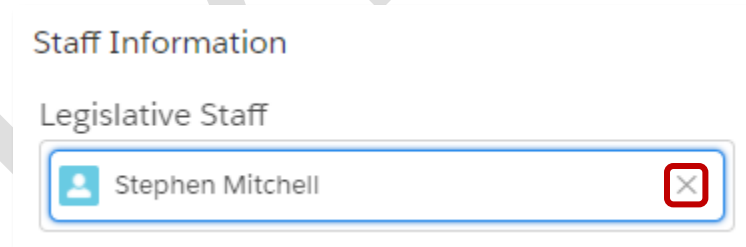
Q "San" in Contacts

- Sandy W Kofax
Sandy W Kofax
- Sandy Horan
Sandy Horan
- Sandy W Gray
Sandy W Gray
- Sandy Smith
Sandy Smith

Figure 78: Edit Case: Search Contact Name

17.3 Edit and Update Staff Information

- o **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.



Staff Information

Legislative Staff

Stephen Mitchell

Figure 79: Edit Case: Legislative Staff Member

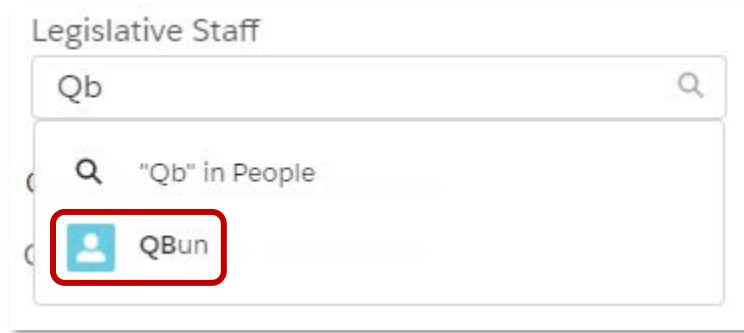


Figure 80: Edit Case: Search Legislative Staff Member

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.

Case	Con...	Subj...	Key...
00...	Step...	Sinc...	N/A
00...	Step...	My i...	N/A
00...	Step...	Why...	N/A
00...	Step...	Nev...	Nev...

Figure 81: Person Account

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

New Case: Inquiry

Case Information

Case Number Case Origin

* Status * Keyword

Open N/A

Description Information

Subject

Constituent's Issue

Category Information

* Category

Cancel Save & New Save

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:
 - o **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.
 - o **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.

* Category
Unemployment Insurance
[View all dependencies](#)

* Sub-Category

Available

- Disqualification
- Missing Payments
- Identity Verification
- Backdate Request
- EDD Case Report

[View all dependencies](#)

Chosen

- Status Update

Figure 83: New Case: Sub-Category-

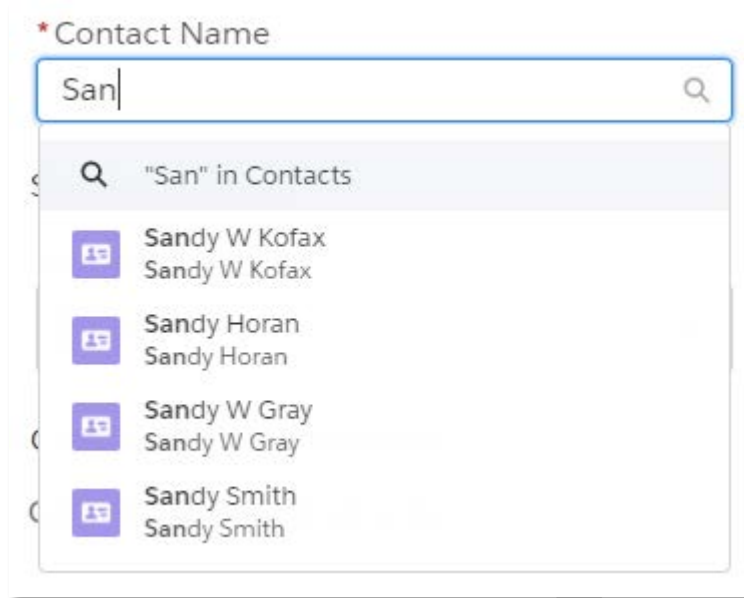
- **Constituent Information** – Contains the following fields:
 - o **Contact Name** – Is the Constituent's name.
10. This field defaults to the Constituent of whom the case was initially filed. In the event, you may want to file the case with a different Constituent, click the **X** in the **Contact Name** field. 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.

Constituent Information

* Contact Name

 Stephen W Mitchell 

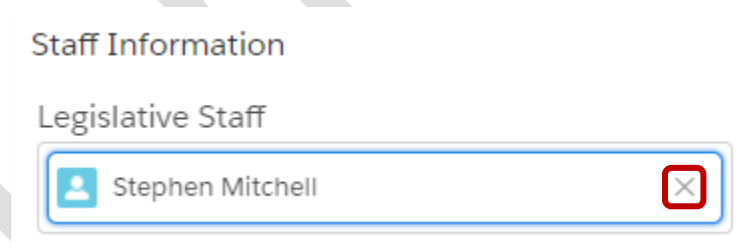
Figure 84: New Case: Contact Name



A screenshot of a web application's search interface. At the top, there is a label '* Contact Name' followed by a search input field containing the text 'San'. Below the input field is a dropdown menu with a magnifying glass icon and the text '"San" in Contacts'. The dropdown lists four contact entries, each with a purple icon of a person and their name: 'Sandy W Kofax', 'Sandy Horan', 'Sandy W Gray', and 'Sandy Smith'.

Figure 85: New Case: Search Contact Name

- o **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.



A screenshot of a web application's 'Staff Information' section. Under the heading 'Legislative Staff', there is a dropdown menu. The dropdown is open, showing a single entry: 'Stephen Mitchell' next to a purple icon of a person. To the right of the dropdown is a red square button with a white 'X' inside, used to clear the selection.

Figure 86: New Case: Legislative Staff Member

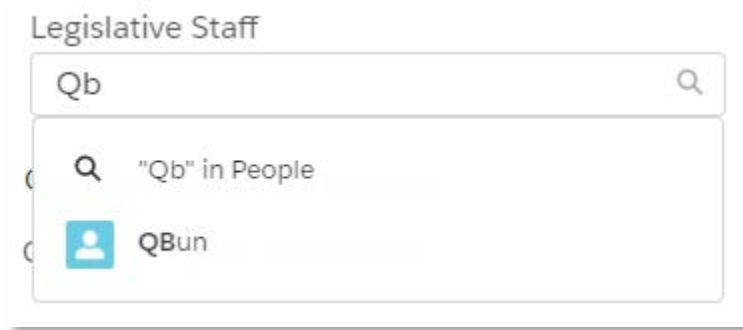


Figure 87: New Case: Search Legislative Staff Member

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.

CONSTITUENT DATA...

Account Name Stephen W Mitchell	Account Owner Stephen Mitchell
Phone (207) 210-8750	
Spoken Language Other	Other Language German
✓ Constituent Information	
EDDCAN	EDD Client Number
Employer Account Number	SSN *****
✓ System Information	
Created By Stephen Mitchell, 9/24/2020, 2:23 PM	Last Modified By Stephen Mitchell, 10/6/2020, 1:58 PM

Cases (4) [New](#)

C...	C...	S...	K...
0...	St...	Si...	N/A
0...	St...	M...	N/A
0...	St...	W...	N/A
0...	St...	N...	N...

[View All](#)

Figure 88: Person Account Page

3. Click the Created by link.

View List, Display As, Refresh Inline Edit Controls

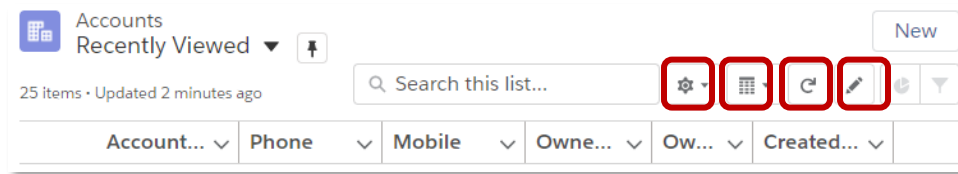


Figure 89: Accounts: Controls

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.

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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:
 - o **Account Name** – Hover over the field, then click the **Pencil** icon . You can then edit the Constituent name and other information. Then click **Save**.
 - o **Phone** – Hover over the field, then click the **Pencil** icon. You can then edit the Constituent's phone number. Then click **Save**.
 - o **Spoken Language** – Hover over the field, then click the **Pencil** icon . You can then edit the Constituent's spoken language number. Then click **Save**.
 - o **Account Owner** –. Hover over the field, then click the **Owner** icon. To change the owner, see **Error! Reference source not found**.
 - o **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](#)
 - o **EDDCAN** – Click in the field, then enter a nine-digit number. Then click **Save**.
 - o **Employer Account Number** – Click in the field, then enter between a seven- and fifteen-digit number. Then click **Save**.
 - o **EDD Client Number** – cThen click **Save**.
 - o **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.