Customer Specific OASIS Release 1.015 Notes (Released 6/10/24)

Release	Description of Change
1.015 - 1	Customer Non-Approver Role Created
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1.015 - 1: Customer Non-Approver Role Created

A new customer user role named the "Non-Approver" role has been created to allow for

additional levels of review outside of the Ordering Official role. Non-Approver roles have the same portal views and viewing rights as Ordering Officials, however they do not have the ability to approve or reject OAs. The non-approver role can save reviewer information in the "Optional Customer Reviewer" field, add customer notes, and request clarification on requests. This role can also submit customer requests, such as billing questions and release of space requests.

1.015 - 2: Customer Portal Updated

The customer portal has been reorganized and updated, removing sections that are no longer needed and adding more relevant query links. The "Reminders" section was removed, which displayed "Action Items" and in-app "Notifications". Customers will still receive email notifications.

Under the "Reminders - Customer" section on the left side of the portal three redundant links were removed and replaced with **All OA Customer Reviews**. This query shows all Customer Approval forms that have been generated since the 1.015 release on June 10, 2024. This query is filterable and by default is sorted by Decision Date/Time chronologically (Review in Progress shows first).

The OA approval section was moved to the top and center of the page and organized as follows:

OAs Needing Approval: Displays all the OAs with the customer that require review. OAs on this list are in a "Review In Progress" state and remain on the list until they are approved or rejected. This query is viewable for all customer OAs of the AB Code.

Request Clarification - Pending: Displays all requests for clarification sent to GSA that are still under review. OAs remain on this list until a GSA response is provided or the OA is approved or rejected.

Request Clarifications - Completed: Displays all completed requests for clarification. Sorted chronologically by "Response Date/Time" by default.

Recently Rejected OAs: Displays all OAs that were recently rejected by the customer in the last 30 days.

1.015 - 3: OAs Needing Approval and the NEW Approval Form

From the customer view, ordering officials can review OAs to approve by clicking the "**OAs Needing Approval**" link on the OASIS home portal. **This replaces the previous Action Item, Accepting, and Reassigning Process.**
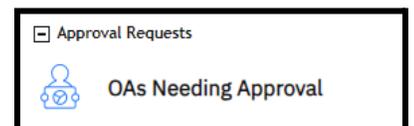
The query shows all OAs GSA has sent to the customer for review, sorted chronologically with the most recently sent at the top. Click on the row of the item that's ready to be reviewed to open the new customer approval form.

On the OA Approval form, the General section shows the reason for the OA review request

(new feature!), the effective date of the change, and who sent it with a date/time stamp. The decided by fields will auto-populate once a customer approves or rejects the OA.

The OA section (see below) shows a link that opens the OA record, and an OA summary link that opens the pre-approval BIRT report. This also shows the location code and location name. Both the General and OA sections are read only as a customer.

New! Optional Customer Reviewers:

The 3rd section is for inputting an "Optional Customer Reviewer" and is editable by any customer role. The field can be used to annotate any information that would help with the internal review, including the name of the person currently reviewing the request.

To populate the field, enter a name and click "**Save**". This is an optional field and does not generate any notifications; it simply creates a note on the approval record and in the query. This field is limited to 30 characters.

New! Customer Notes:

To make additional internal agency notes on the approval request, use the fourth section, "**Optional Customer Notes**". These notes have a 1,000 character limit and are stored on the approval record chronologically when multiple notes are added. Although GSA can see these notes, these are to be used for internal agency purposes to note information pertinent to your agency's review only and should not be used in an attempt to communicate with GSA regarding the approval. Notes can be added by both Ordering Officials and Non-Approver roles. To add a note:

1. Click "**Add"** on top right of the "Optional Customer Notes" section. This opens a pop-up window (may need to scroll up to see).
2. In the pop-up, the note stores the customer name and timestamp. Make a note in the
3. required **Note** section. Click "**Submit**"

Once submitted, notes cannot be deleted or modified, and they are shown on the approval form as shown below.

Requesting Clarification from GSA- Reminder:

At the bottom of the customer approval form there is a "Request Clarification from GSA" section to ask a question that requires a response from GSA. To add a question that requires GSA review:
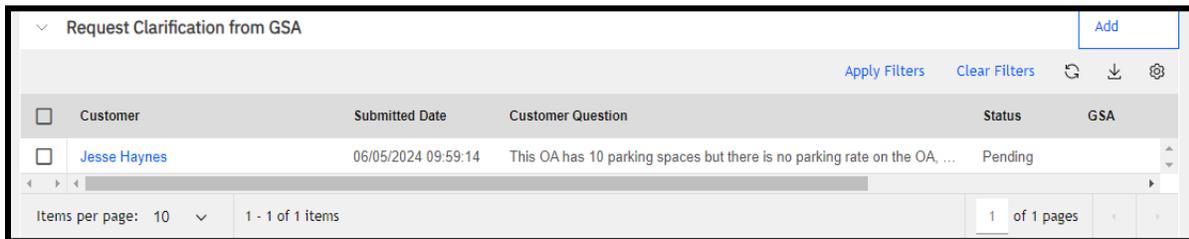
1. Click "**Add**" on the top right of the request clarification section. This opens a pop up similar to customer notes (may need to scroll up).

2. In the "Customer" section of the pop-up add a question in the required **Customer Question** section.
3. Click "**Submit**".

The window closes and the question is listed in the request clarification section on the form with a status of "Pending".

1.015 - 4: Request Clarification - Pending

The request clarification question can now also be tracked on the customer home portal in the **Request Clarification - Pending** query. While in this stage, any customer user can edit the question field to provide more information or ask additional questions. However, only one request for clarification can be open at any given time. The form will only show the name and date of the original question and not an updated name or date if the question is revised.

1.015 - 5: Request Clarification - Completed

Once GSA has reviewed and responded to the question it shows up in the **Request Clarification - Completed** query. Selecting the ID will display the clarification and GSA response.

Approving Requests- Reminder

Ordering Official customers have three options at the top of a customer approval form: "**Save"**, "**Approve**", and "**Reject**". The save feature is only needed when adding an internal customer reviewer. Non-Approvers only have the option to save.

When ready to Approve a request, Ordering Officials should:

1. Click **Approve.**
2. An approval pop-up appears with an attention message and a section for **Agency Information** to be entered. This is the step where users can specify employee counts and add any customer identifiers if desired. These identifiers are not required, but are useful to the customer to easily identify which sub-agency this OA belongs to, or which floor this agency resides on. Once entered, these can only be updated during a future approval request. Enter the information and Click **Submit.**

The pop-up and customer approval form will close once submitted. The OA is now in a "Customer Approved" status. A record of the approval can be found in the **All OA Customer Reviews** query or in the OA Notification tab where it displays the approval decision, the user name who approved, and date and time. When the approval form is reopened it displays this information in the "General" section. To access a copy of the post-approval OA Summary report showing the customer approval, navigate to the OA and go to the "Notes & Documents" section.

Rejecting Requests- Reminder

If an in progress customer review needs to be rejected for any reason Ordering Officials should:

1. Open the customer approval form and click **Reject**
2. A rejection pop-up appears and displays an attention message explaining the impact of rejecting the OA.
3. Enter a **Rejection Reason** in the editable text field and click **Submit**

After clicking submit, the pop-up and form closes and the OA goes to a "Rejected" status. The OA is then removed from the "OAs Needing Approval" query.

1.015 - 6: Recently Rejected OAs

Once an OA is rejected, it shows up in the **Recently Rejected OAs** query for 30 days. When the rejected customer approval record is opened, it displays updated information in the "Decided By", "Decision Date", "Decision", and "Reason" fields. The rejected query also displays OAs GSA removed from customer review in progress along with the reason the OA was removed.

1.015 - 7: OA Notifications Tab Updated

The "Notifications" tab of OA records has been updated to match the reconfigured approval process. All approval requests are now listed under the **Customer Approvals** section which only displays requests submitted after OASIS release 1.015. Notifications prior to this release are stored in the last section titled **Archived Review (Prior to June 2024)**.

The archived review section displays collapsed by default until a user expands it. If the window is closed with the tab expanded, it defaults to expanded going forward unless reverted back.