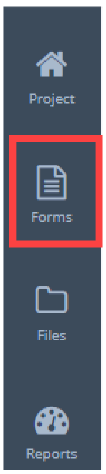
Client Agency Input

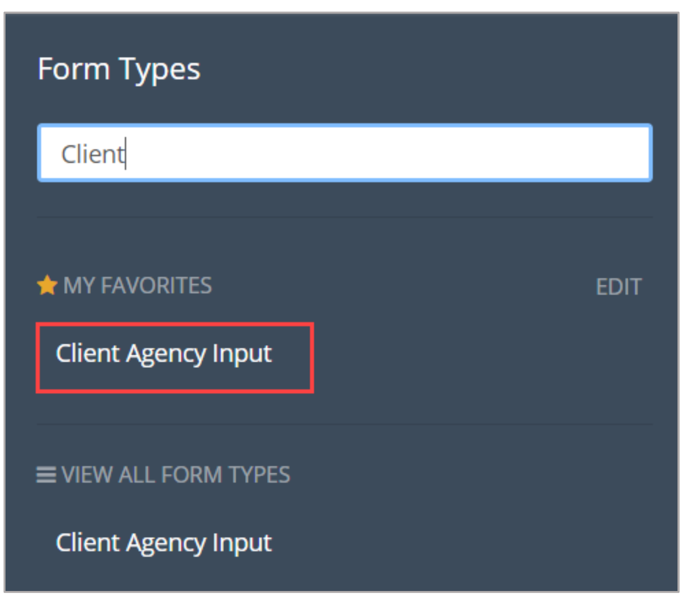
This form is used by Client Agencies and DGS Project Managers to coordinate reviews, approvals, and requests for information or changes between DGS and their clients. This form can be initiated by either party and sent to the other for response. Requests from either party to change the time, budget, or scope of a project should also be handled using this form.

Creating a Client Agency Input document

1. From the project, click the **Forms** icon**.**

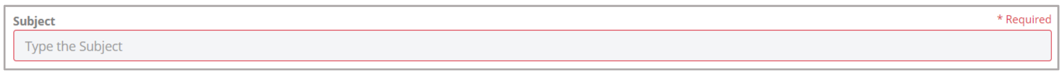


2. In the search field, begin typing **Client** and the form will appear in the forms list. Click **Client Agency Input form** to open the log.



3. Click the **New** button in the upper right corner to create a new Client Agency Input form.

4. Enter the title of the input request in the **Subject** field.



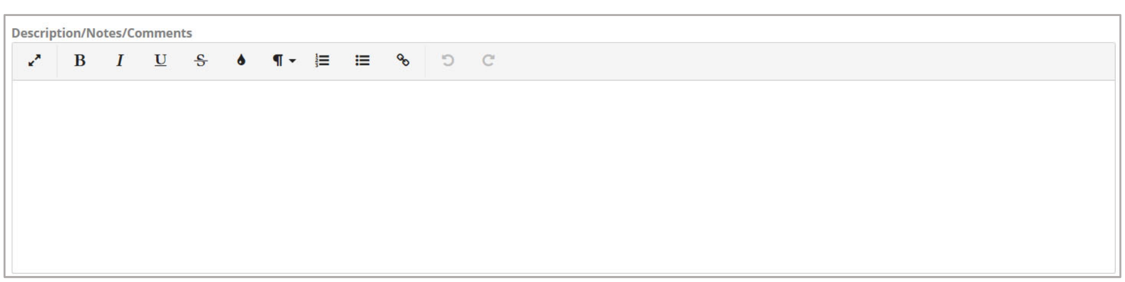
5. Enter the **Date** of the request.

6. Click inside the **Agency** field and select your agency, or the Client Agency from the dropdown list.

7. Click inside the **Contact Name** field and select the name of the Agency or DGS contact from the dropdown list.

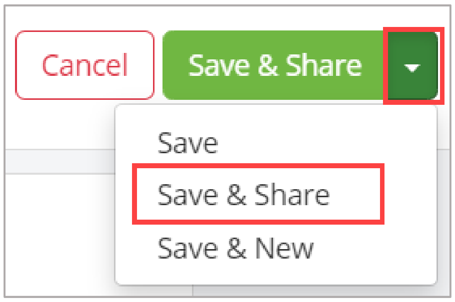
8. Click inside the **Type** field and select the appropriate type of request from the list.

9. Enter any applicable information in the **Description/Notes/Comments** field.



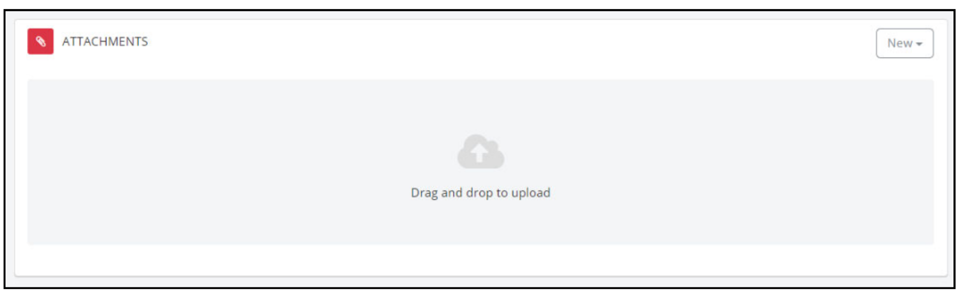
10. Add the **Response Requested by Date**.

11. Click the **Save and Share** button, click **Save & Share** and save with the applicable Share Groups.



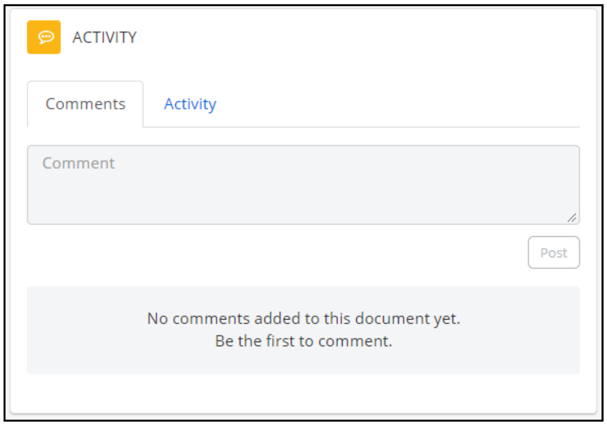
Attach Supporting Documentation

1. Drag and drop any supporting files to the **Attachments** section of the record.



Comments

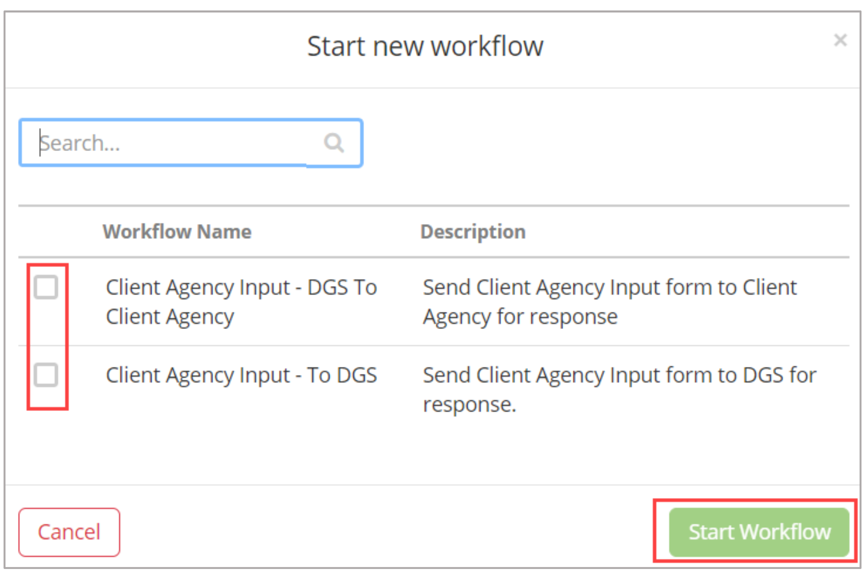
1. To ask questions or add commentary regarding the Client Agency record, use the **Comments** section.



Workflow the Client Agency Request

1. Scroll to the Workflow panel and click the **Start New** button.

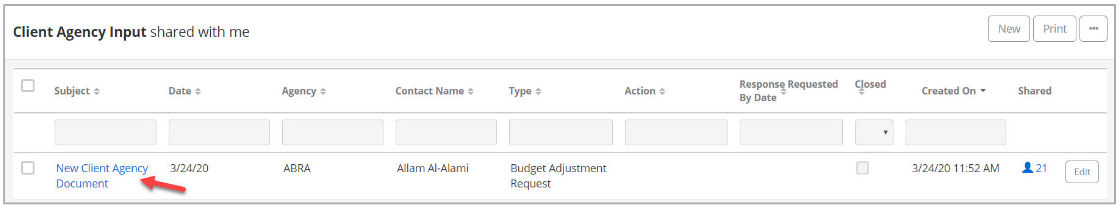
2. Click the **checkbox beside the appropriate workflow** and click **Start Workflow**.



Client Agency Input

Responding to a Client Agency Request

1. Open the Client Agency Request log and click **Edit** in the row of the item you wish to edit.



2. Review any attachments located on the bottom of the form.

3. Click the **Edit** button.

4. Review the information and click inside the **Action** field and select from the dropdown list.

5. Enter the **Response Date**.

6. Click inside the **Responded By** field and select the name from the dropdown list.

7. Enter the **Response**.

8. Click inside the **Cost Impact** field and select Yes, No, TBD, or N/A, as applicable.

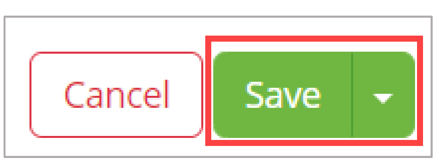
9. Enter the **Impact Amount**, if applicable

10. Click inside the **Schedule Impact** field and select Yes, No, TBD, or N/A, as applicable.

11. Enter the number of **Impact Days**, if applicable.

12. If this item is closed, click the checkbox.

13. Click the **Save** button.



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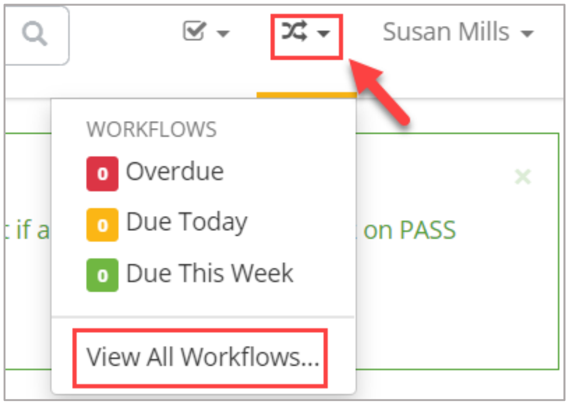
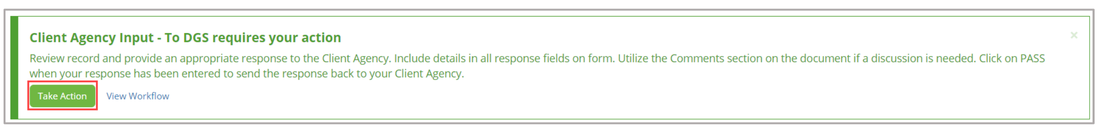
Complete the Final Workflow

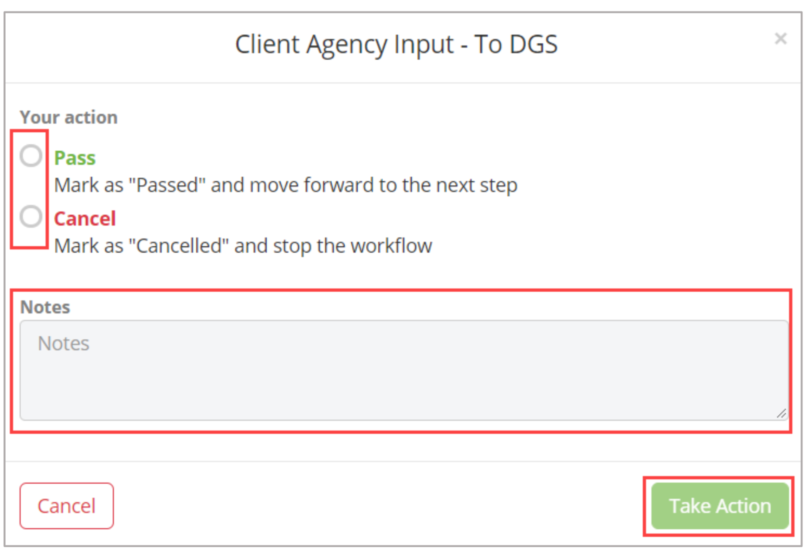
1. Open the document via the Client Agency Request log or the workflow button beside your name.



2. Once the document is open, click the **Take Action** button in the workflow message on the top of the form.



3. Select **Pass** if the Client Agency Request is acceptable or click **Cancel** to reject the request. If the request is rejected, enter the reason for the rejection in the **Note**s field. Click the **Take Action** button to complete the workflow.



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