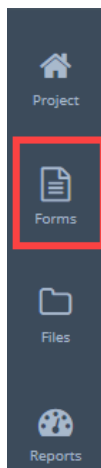


Client Agency Input

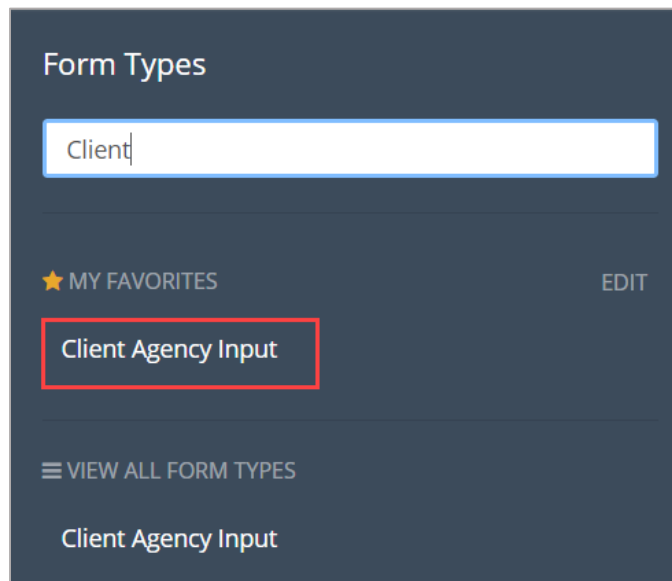
This form is used by Client Agencies and DGS Project Managers to coordinate reviews, approvals, and requests for information or changes between DGS and their clients. This form can be initiated by either party and sent to the other for response. Requests from either party to change the time, budget,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

Creating a Client Agency Input document

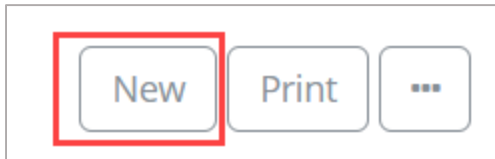
1. From the project, click the **Forms** icon.



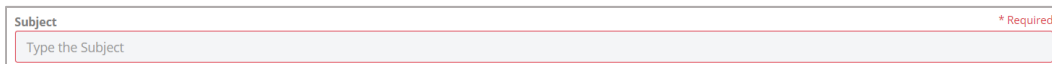
2. In the search field, begin typing **Client** and the form will appear in the forms list. Click **Client Agency Input form** to open the log.



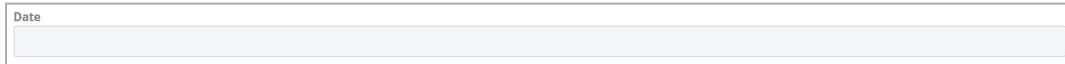
3. Click the **New** button in the upper right corner to create a new Client Agency Input form.



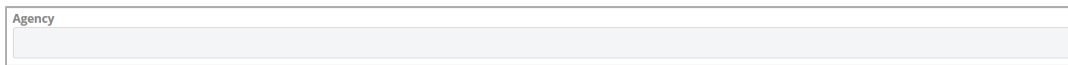
4. Enter the title of the input request in the **Subject** field.

A screenshot of a text input field. The label 'Subject' is at the top left, and '* Required' is at the top right. The input area contains the placeholder text 'Type the Subject'.

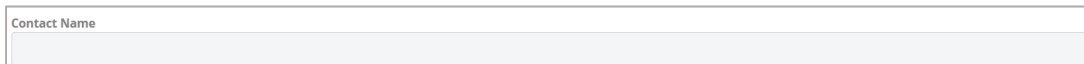
5. Enter the **Date** of the request.

A screenshot of a date input field. The label 'Date' is at the top left.

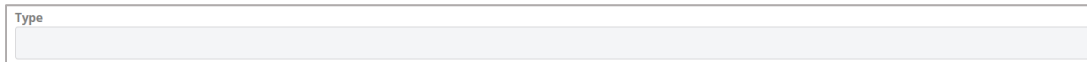
6. Click inside the **Agency** field and select your agency, or the Client Agency from the dropdown list.

A screenshot of a dropdown menu. The label 'Agency' is at the top left.

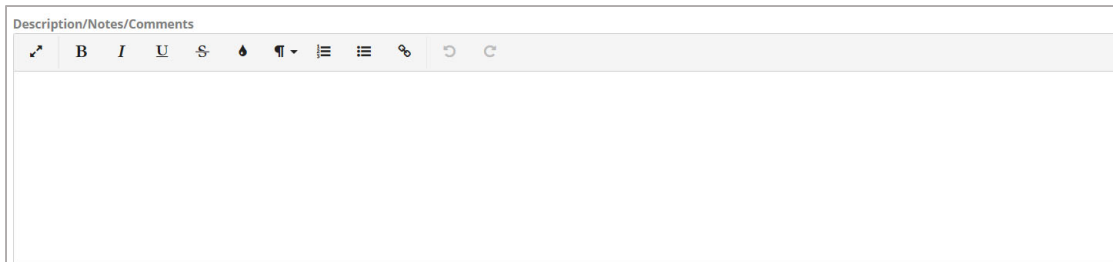
7. Click inside the **Contact Name** field and select the name of the Agency or DGS contact from the dropdown list.

A screenshot of a dropdown menu. The label 'Contact Name' is at the top left.

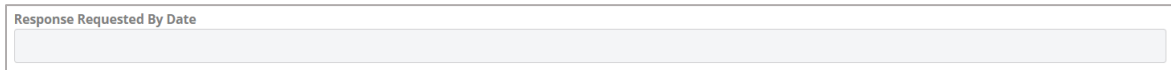
8. Click inside the **Type** field and select the appropriate type of request from the list.

A screenshot of a dropdown menu. The label 'Type' is at the top left.

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

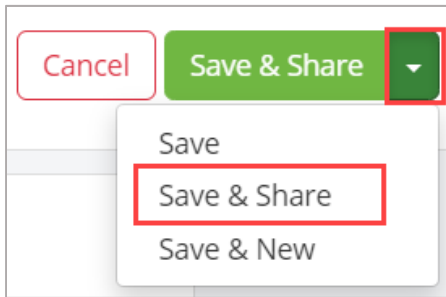
A screenshot of a rich text editor. The label 'Description/Notes/Comments' is at the top left. Below the label is a toolbar with icons for bold, italic, underline, strikethrough, link, unlink, list, and other text formatting options.

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



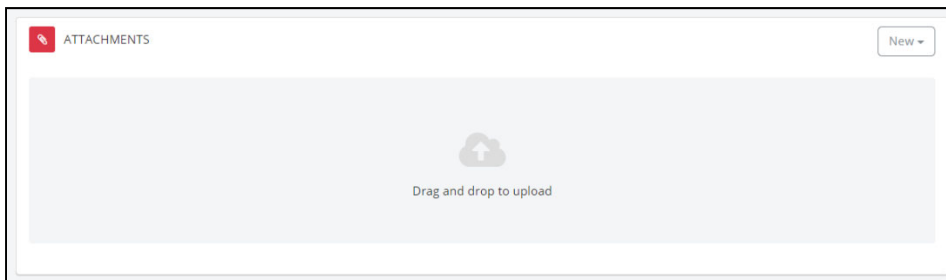
A screenshot of a text input field with the placeholder text "Response Requested By Date". The field is empty and has a light gray background.

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



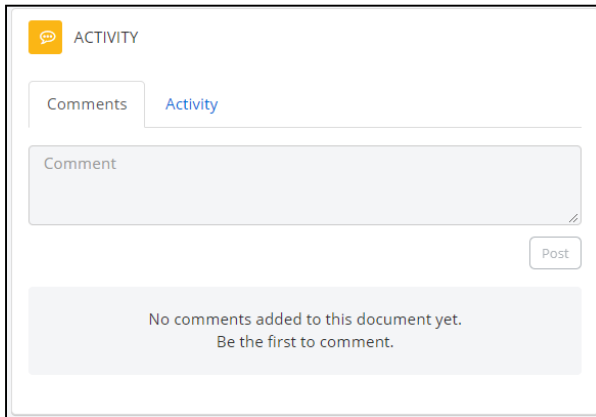
Attach Supporting Documentation

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



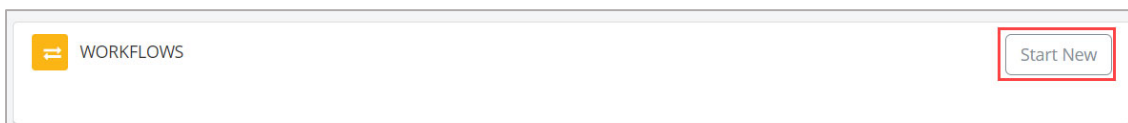
Comments

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

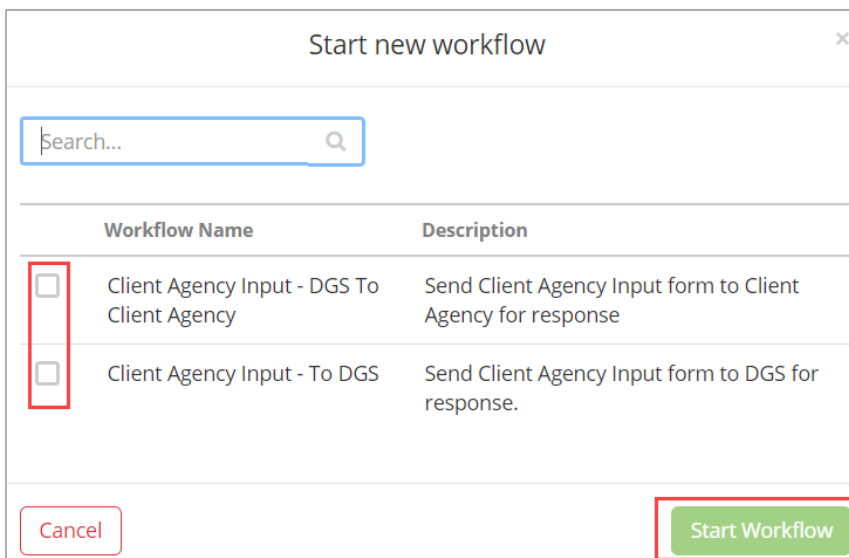


Workflow the Client Agency Request

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



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



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.

<input type="checkbox"/>	Subject	Date	Agency	Contact Name	Type	Action	Response Requested By Date	Closed	Created On	Shared
<input type="checkbox"/>	New Client Agency Document	3/24/20	ABRA	Allam Al-Alami	Budget Adjustment Request			<input type="checkbox"/>	3/24/20 11:52 AM	21 <input type="button" value="Edit"/>

2. Review any attachments located on the bottom of the form.
3. Click the **Edit** button.

DETAILS

Subject
New Client Agency Document

Date
3/24/20

Agency
ABRA

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

Action

5. Enter the **Response Date**.

Response Date

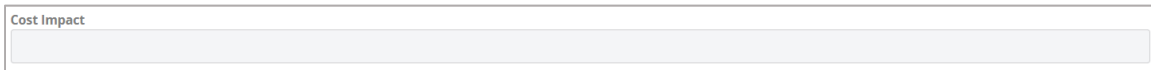
6. Click inside the **Responded By** field and select the name from the dropdown list.

Responded By

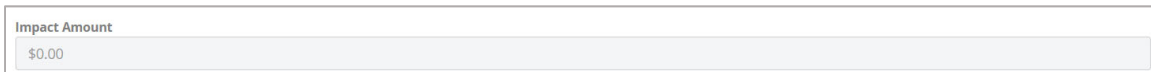
7. Enter the **Response**.



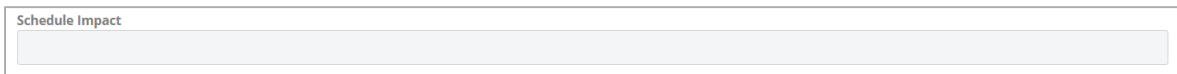
- 8. Click inside the **Cost Impact** field and select Yes, No, TBD, or N/A, as applicable.



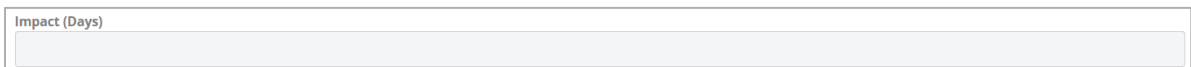
- 9. Enter the **Impact Amount**, if applicable



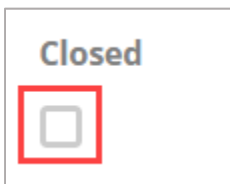
- 10. Click inside the **Schedule Impact** field and select Yes, No, TBD, or N/A, as applicable.



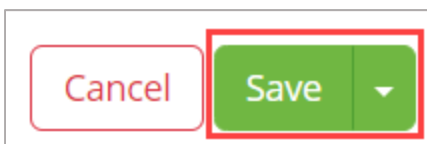
- 11. Enter the number of **Impact Days**, if applicable.



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

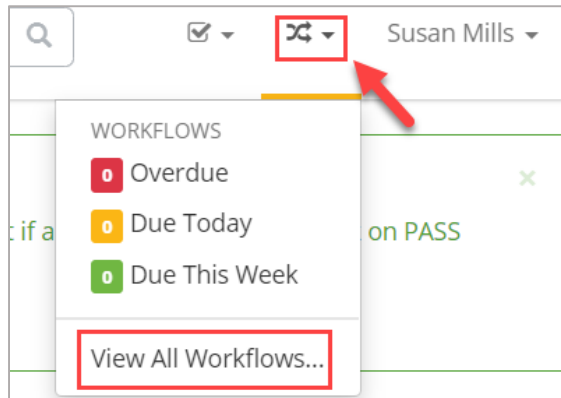


- 13. Click the **Save** button.



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 **Notes** field. Click the **Take Action** button to complete the workflow.