DAVIS VISION

IMPLEMENTATION REQUEST FORM
ACCOUNT EXECUTIVE (AE)

USER MANUAL

Version: 1
October 15, 2007

DAVIS VISION

IMPLEMENTATION REQUEST FORM ACCOUNT EXECUTIVE (AE)

711 Troy Schenectady Road
Latham, NY 12110
Phone: 518-220-6000

TECHNICAL SUPPORT

DOCUMENTATION SUPPORT

Bhavna Hilligrass

bhilligrass@davisvision.com

x6449

CONTENTS

Introduction 5
Assumptions 6
IMPLEMENTATION PROCESS FLOW 7
IMPLEMENTATION FORM HOME PAGE 8
PA Users 8
Regular Users 8
IMPLEMENTATION REQUEST FORM OPTIONS 11
New Request Form 11
New Advance Notification Form 13
Create a new form from a submitted form 15
Field types 16
IMPLEMENTATION REQUEST FORM SECTIONS 17
Main 17
Implementation Request Type 17
File Attachments 19
Open Enrollment 21
Group/Company Contact Info 22
Performance Guarantees 22
Special website required? 23
Eligibility 23
ID Card Info 23
Client Specific Data used for Billing/Reporting 23
Product(s) Purchased 24
Plan Type 24
Frequency/Cycle 24
Split Benefits 25
Non-plan Allowances 25
Indemnity (OON) Reimbursements 25
Basic Plan Co-Payments 26
Are Formulary contact lenses available? 26
Billing/Rates 27
Insured? 27
Lab Schedule 27
Invoice Requirement 27
Billing Electronic Paid Claims File Requirement 27
Broker 27
Provider Information 28
Panel Type 28
Panel Region 28
Retailers (non-standard) 28
Professional fees – Payment to Doctors (Std Listed) 28
Member Communication 29
Vision Care Summary Benefit Brochure 29
DV ID Cards 29
Initial Mailing 29
New Hire Packages 29
Reporting 30

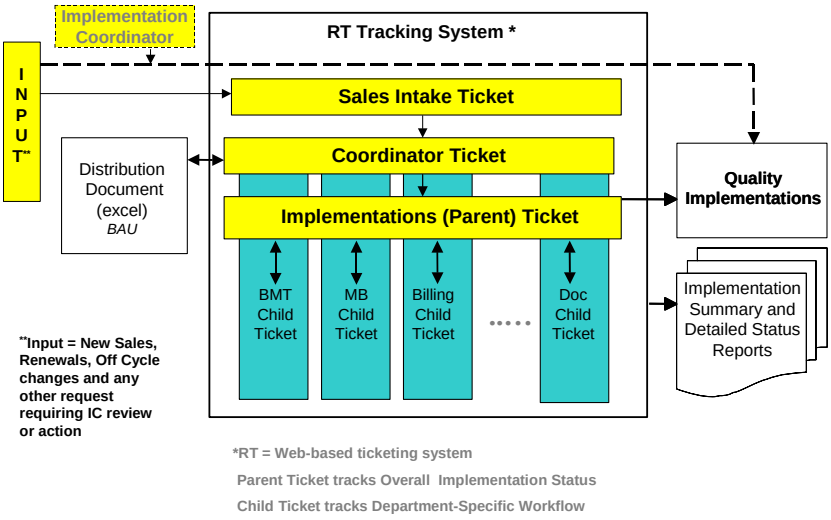
Utilization Reports....30
Government Program Files....30
SAVE & RETRIEVE THE IMPLEMENTATION REQUEST FORM....31
Saving to a location (shared network or desktop)....31
PA Users....31
Regular Users....31
Retrieve Implementation Request Form....32
PA Users....32
Regular Users....32
SEND IMPLEMENTATION REQUEST FORM TO IC....33
LOGOFF IMPLEMENTATION REQUEST FORM....34
PA Users....34
Regular Users....34

IMPLEMENTATION REQUEST FORM

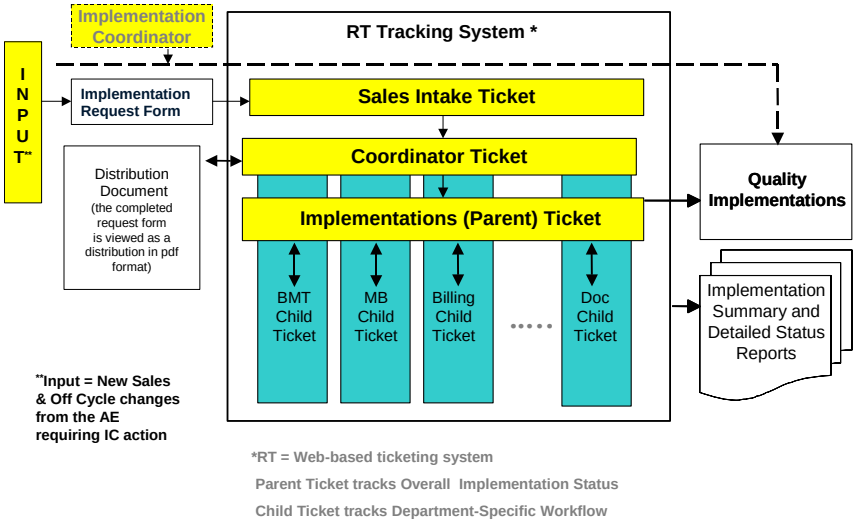
The Implementation Request Form is located on the Implementation Request Form home page.

An Account Executive (AE) will use the Implementation Request Form, to capture details pertaining to a new Implementation. Once all the information is gathered, this form is then electronically submitted to the Implementation Coordinator (IC). The Implementation Coordinator (IC) has the responsibility to complete the implementation request form for the additional IC fields, create and publish the Distribution document for implementation. The development of the Distribution in excel format is replaced by the Implementation Request Form and its alternate view as a Distribution. Below is the before and after high-level process flow.

Process as of Jan 1, 2007



New Process as of 3Q 2007



Assumptions

The intent of this manual is as follows:

- To provide a general introduction to Microsoft Office InfoPath application.
- To access and complete the Implementation Request Form as an Account Executive (AE).
- To save and send the completed Implementation Request Form to the Implementation Coordinator (IC).

This manual assumes:

- You have access to the Microsoft Office InfoPath application on your desktop.
- You have access to the Implementation Request Form.
- If you are a PA user, you are setup with the appropriate configurations to access Microsoft Office InfoPath and the Implementation Request Form.
  Note: For new PA users, contact the Helpdesk (x4357) to request appropriate setups configurations.
- You will access the Implementation Request Form as an Account Executive (AE).
- You have the necessary information to complete the Implementation Request Form.

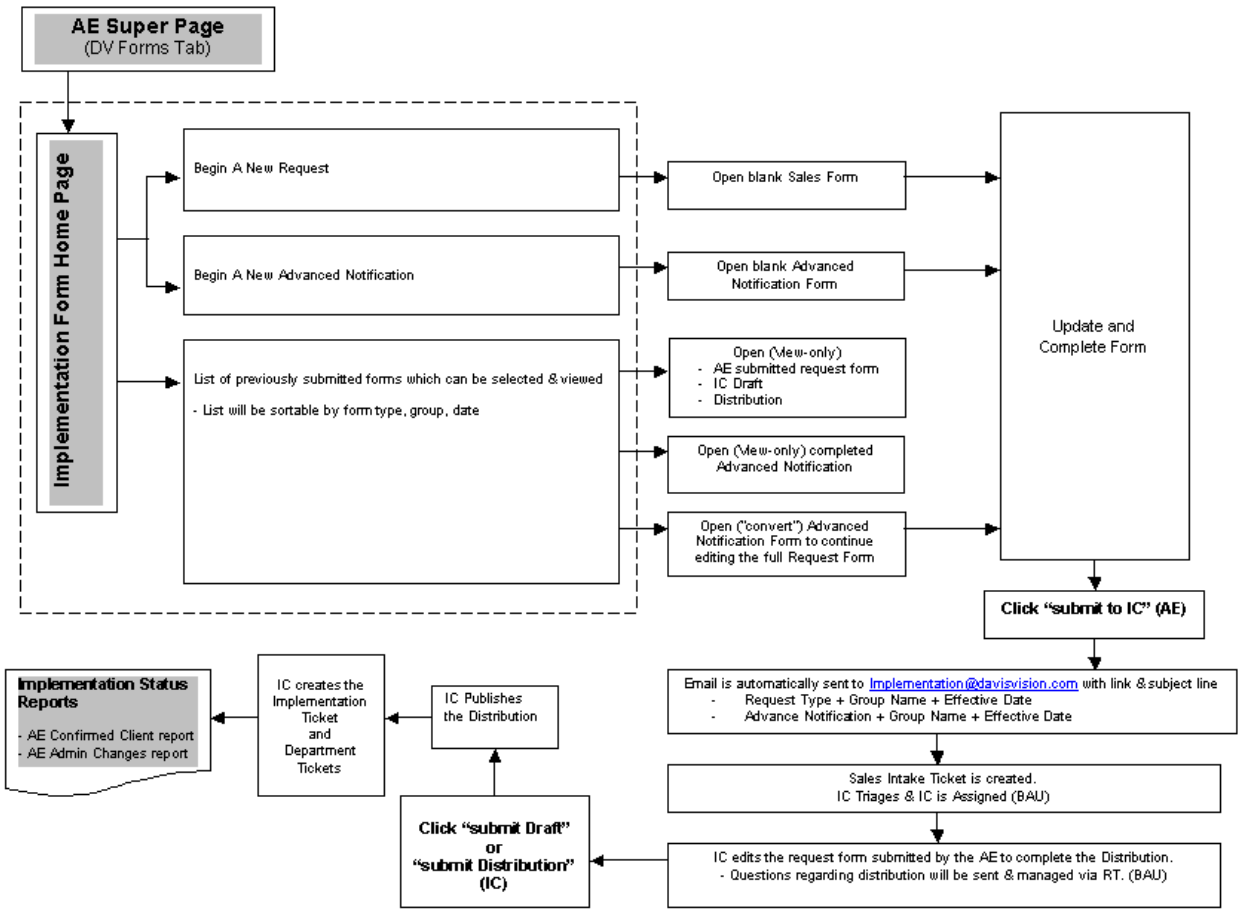
Chapter

1

Implementation Process Flow

An Account Executive (AE) can access the Implementation Form Home Page from the AE Superpage. The Implementation Request Form is used to capture details pertaining to a new Implementation. Once all the information is gathered, this form is then electronically submitted to the Implementation Coordinator (IC). The Implementation Coordinator (IC) completes the implementation request form for the additional IC fields, creates and publishes the Distribution document to the departments. The RT Tracking System tracks the status of the Implementation. The end-to-end workflow is depicted below.

PROPOSED FORM PROCESS FLOW FROM AE SUPERPAGE



Proceed to the Implementation Form Home Page section on page 8 to review home page features.

Chapter

2

Implementation Form Home Page

PA Users

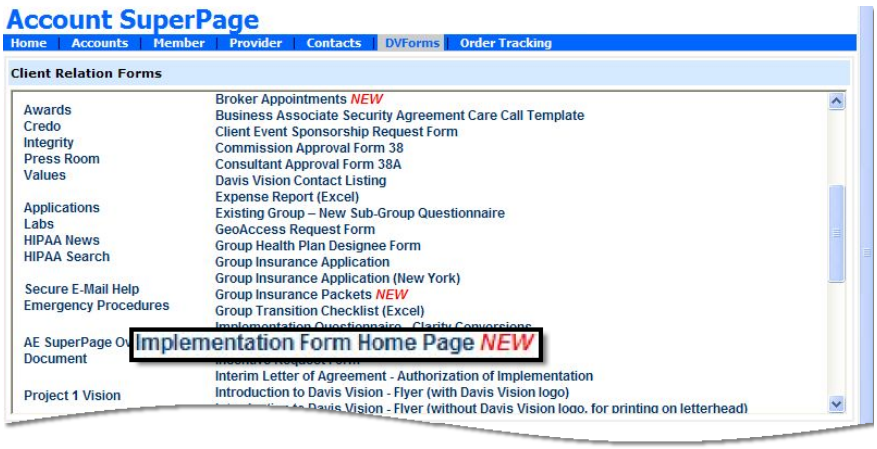
For PA Users, access the Implementation Request Form as detailed below:

1. Double-click the **Remote Desktop** icon on the desktop.
2. Ensure the IP address is displayed as: 172.30.1.155, and press the **Connect** button.
3. Once connected, the terminal server's desktop is displayed.
4. Double-click the **Implementation Form Home Page** shortcut.
5. Once the **Implementation Request Form Home Page** is displayed, proceed to Figure 1 to review the home page.

Regular Users

Access Implementation Request Form Home Page using these steps:

1. Access the Account Super Page and click the **DVForms** tab.
2. Click the **Implementation Form Home Page** link.



3. Once the **Implementation Request Form Home Page** is displayed, proceed to Figure 1 to review the home page.

Figure 1: Implementation Form Home Page

As shown in Figure 1, the **Implementation Request Form Home Page** displays the following features:

A. Begin a New Request: Opens a blank Implementation Request form, which maybe updated online or offline. It is recommend that offline forms are saved (as common department practice) if it is not ready to submit to the Implementation Coordinator (IC). Once completed, submit the form to transfer ownership to the IC. The IC will complete any additional changes to the form.

B. Begin a New Advance Notification: Opens a new advance notification request form to send an advance notice to the IC. Use this method to request materials and open enrollment setup if it is needed in advance of the benefit effective date. This method allows you to send minimal information. 'Convert' the advance notification form into the Implementation Request form by completing the remaining information and submitting to the IC.

C. AE User Manual: Press the **AE User Manual** link to access the user manual detailing the features and functions of the Implementation Request Form.

D. View document dates: The **Implementation Request Form Home Page** view defaults to display requests submitted or updated within the last 90 days. Select a different date range and click the **Go** button to view submitted/updated requests greater than 90 days.
Note: The date field refers to the benefit Effective Date entered in the Main section.

E. List of previously submitted Implementation Request forms, which maybe sorted using any of the column labels, for e.g.: Request Date. The AE and others in the same Team Leader group may only view submitted forms. **Note:** The IC can access all submitted forms.

- RT, AE and IC fields: Appear once the IC submits an update to the Request form submitted by the AE.
- Documents: Lists work in progress or submitted phases of the Implementation Request form.
  - AE Adv Req – AE submitted Advance Notification Request (if one was used)

    F. - 'Convert' - After submitting an Adv Req, click **Convert** link to continue updating the remaining Implementation Request form.
  - AE Imp Req - AE submitted Implementation Request Form
  - IC Draft - IC's working copy of the AE submitted form (not published)
  - Distribution - Distribution that has been published to the Latham departments.

    Note: Refer to the AE Confirmed Client and AE Admin Changes reports for the status of the document (preliminary distribution or final distribution)

G. Attachments: Displays supporting documents that are attached to the Implementation Request Form. The **Manage form attachments** link on the form allows the AE to add & delete attachments to the form. The AE may add, view or delete attachments when using the following form types:

- Begin a new request
- Begin a new advance notification, or
- Convert an advance notification to a full form.

Once the Implementation Request is submitted to the IC, any additional attachments to must be sent via mail to Implementation@davisvision.com. The IC will have read-only access to the attachments on the Implementation Request form and the Home Page.

H. Indicates the number of pages containing various Implementation Request Forms.

Once you successfully access the Implementation Request Form, review the form options as defined in the Implementation Request Form options section on page 11.

Chapter

3

Implementation Request Form options

From the Implementation home page, you may use one of the following methods to submit an Implementation Request form:

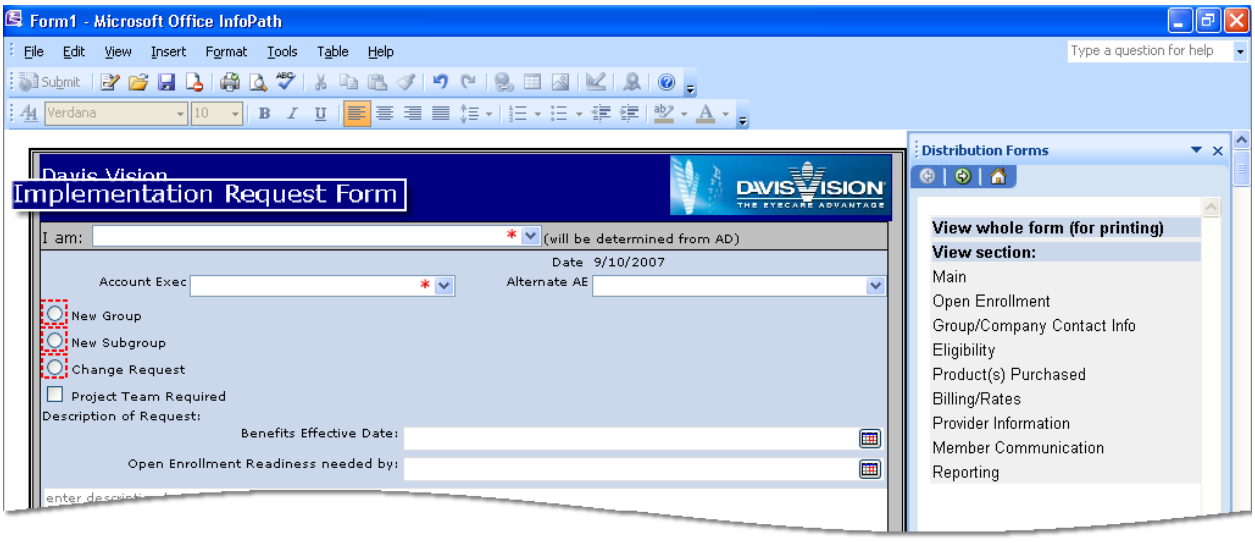
- New Request Form
- New Advance Notification Form
- Create a new form from an existing submitted form

New Request Form

The Implementation Request Form is displayed in the Microsoft Office InfoPath window.

As displayed in Figure 2, Microsoft Office InfoPath contains the standard look and feel of a Microsoft application.

Figure 2: Implementation Request Form in InfoPath.



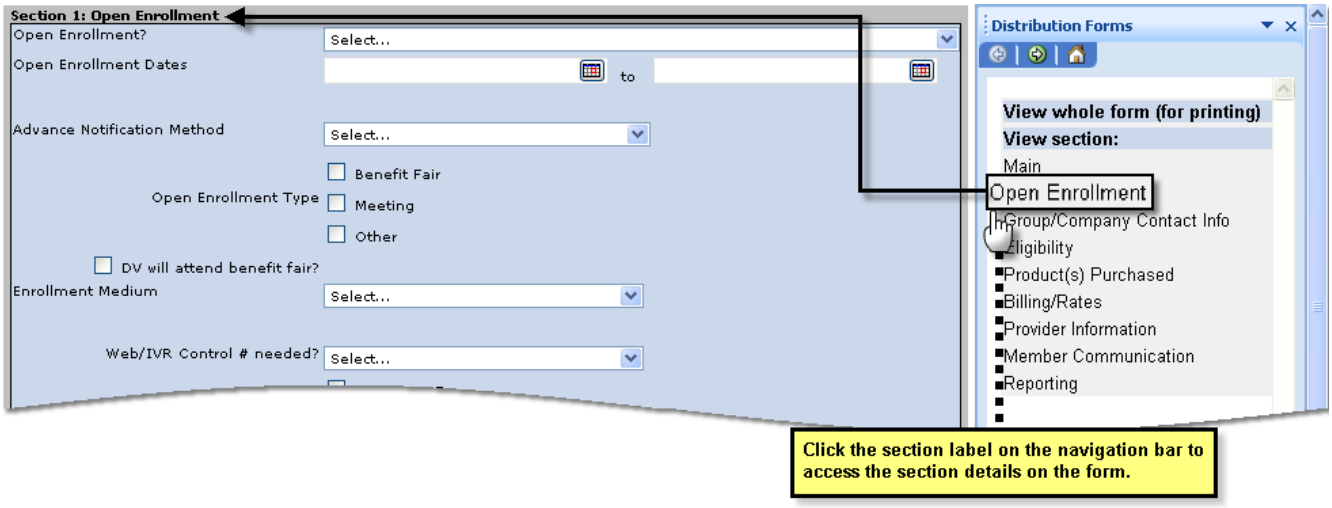
Navigate to sections in the form using one of the following methods:

- Click the **View Whole form (for printing)** link and use the scrollbar to navigate through the entire form.

  Or

- Click the section label link in the section navigation bar to jump to the appropriate section in the form as displayed in Figure 3, for e.g. **Open Enrollment**

Figure 3: Navigating within the Implementation Request Form.



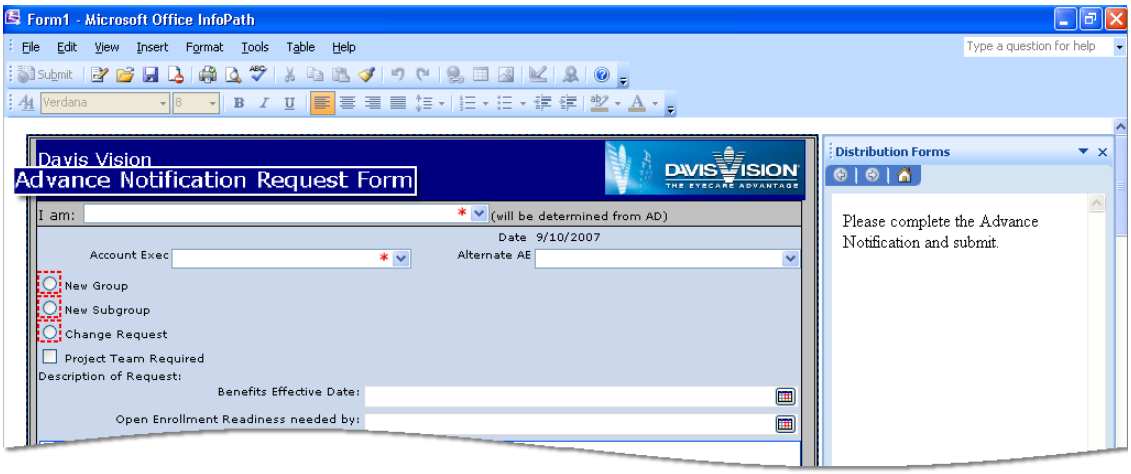
New Advance Notification Form

The New Advance Notification form allows the ability to request materials in advance of the benefit effective date. For e.g.: this form requires minimum information to allow the Documentation department to create materials needed for the Open Enrollment period and the Provider Panel to be established in the system.

The Advance Notification Form is displayed in the Microsoft Office InfoPath window.

As displayed in Figure 4, Microsoft Office InfoPath contains the standard look and feel of a Microsoft application.

Figure 4: Advance Notification Form in InfoPath.



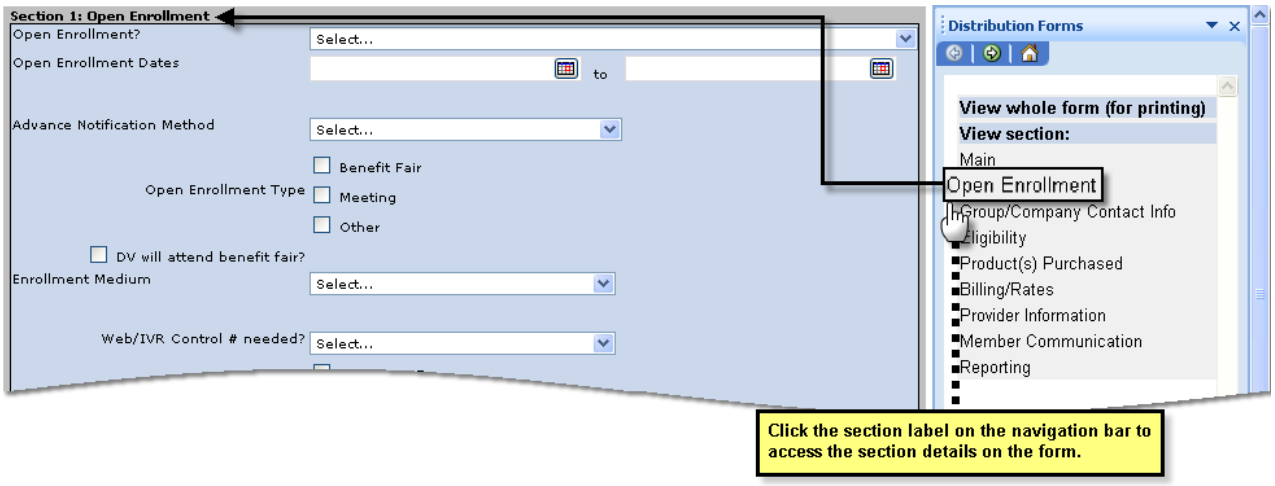
Navigate to sections in the form using one of the following methods:

- Click the section label link in the section navigation bar to jump to the appropriate section in the form as displayed in Figure 5, for e.g. **Open Enrollment**

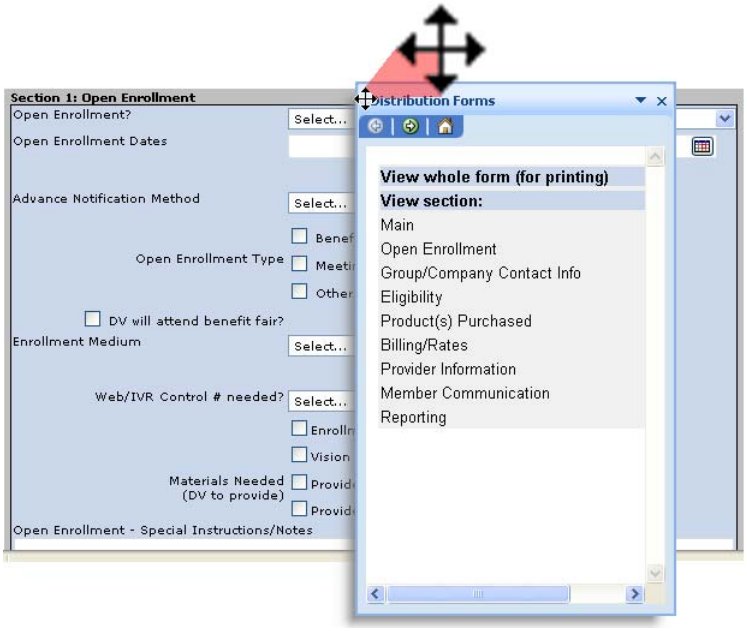
  Or

- Click the **View Whole form (for printing)** link and use the scrollbar to navigate through the entire form.

Figure 5: Navigating within the Implementation Request Form.



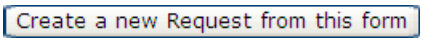
Note: The Navigation bar is a floating Menu thereby allowing you to use the 4-way arrow to drag and drop the navigation bar to a location based on your preference. For e.g.: Figure 5 displays the navigation bar to the right of the form.



Create a new form from a submitted form

The original creator of a form (AE or authorized designee) has the option to access and create a copy of a form they previously submitted. The new form, which contains all the contents from the original form; maybe updated where appropriate and submitted to the IC as a new form.

To create a copy of a previously submitted form and submit to the Implementation Coordinator (IC):

1. At the Implementation Form Home Page, locate the submitted form and click the **View** link.
2. At the **Main** section, click the 

link to create a copy of the submitted form.
3. Once the editable version of the form is displayed; change the appropriate fields and click the

button to complete the submission process.
For additional details refer to the Send Implementation Request Form to IC section on page 33.

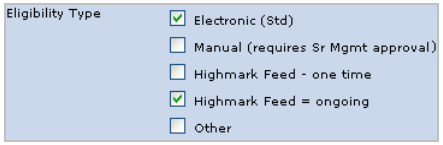
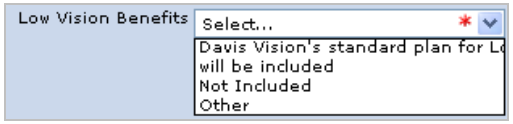
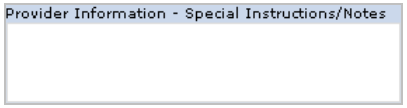
Note: Only the original creator of the form (AE or authorized designee) can view and create copies of a submitted form.
For all other viewers, the submitted form will be displayed in PDF format.

Once you have navigated to the appropriate section, proceed to the Field types section on page 16 to review field input information.

Field types

Information on the Implementation Request Form is captured using one or more of the field types described below.

Table 1: Field types in the 'Implementation Request Form'.

Field Type	Description	Example
▪ Red asterisk (*)	Implies a required field that must be completed to save the form.	
▪ Radio Buttons	Allows the selection of one choice in the group.	
▪ Single Checkbox	Allows the selection of one choice.	
▪ Multiple Checkboxes	Allows multiple selections in the group.	
▪ Drop-down Menu.	Click the arrow to select one choice from the drop-down menu.	
▪ Multiple Checkboxes and Text field	Allows multiple selections and insertion of user defined values in the text box.	
▪ Predetermined field value.	Displayed based on a predetermined database value.	
▪ Override predetermined field value.	Allows overriding the predetermined database value with a new value by selecting the associated checkbox.	
▪ Text box	Allows the insertion of user defined values in the text box.	

Proceed to the Implementation Request Form Sections on page 17 to review sections details.

Chapter

4

Implementation Request Form Sections

The Implementation Request Form is made up of various sections; each containing required fields that must be completed before submitting to the Implementation Coordinator. Partially completed forms maybe be saved to a location (shared drive preferably) and updated online or offline.

A brief description and keys items of each section are describe below.

Always start a new request form online using on the following methods. Each form has a unique id and can only be submitted to he IC once.

IMPORTANT

Always start a new request form online using on the methods in the Implementation Request Form options section. Each form has a unique id and can only be submitted once to the IC.

General

Upon accessing a New Request, Advance Notification, or Copy of an existing form, your Windows login information will automatically populate the **Account Executive** field. Select the drop-down menu to change the AE name.

Note: The submitter of the form is identified on the associated RT Sales Intake ticket.

Main

The Main section contains the basic request information such as request type and benefit effective date. It also contains the checklist of items (originally published by the IC team, Jan 2007) that should accompany the implementation request. The electronic files (i.e., proposal) can be attached to the form as described below.

Implementation Request Type

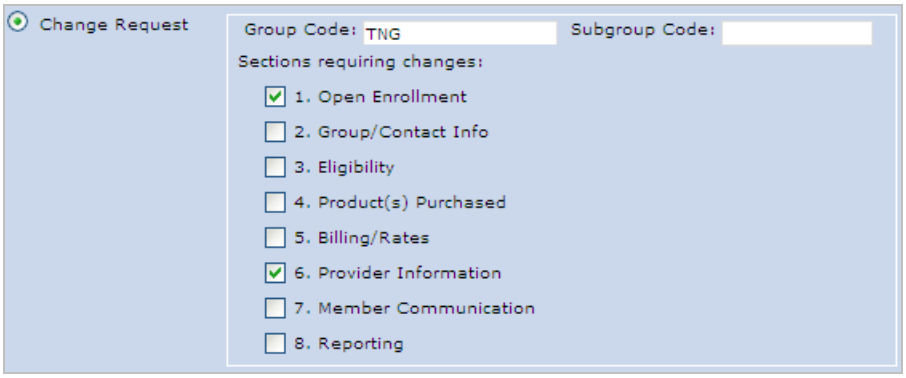
Based on the implementation request, select one of the following fields to indicate request type.

- New Group
- New Subgroup
- Change Request: Scroll to the section(s) and/or field(s), and update as necessary.

Dynamic fields are displayed based on the request type, for e.g.: New Subgroup. These fields must be completed in order to submit the final form to the IC.

Note: When selecting the 'New Subgroup' or 'Change Request' options, select the section(s) that are changing under the **Sections requiring changes** area. Only the selected section(s) will be displayed under the **Main** section of the form.

For e.g.: In the image below, only the **Open Enrollment** and **Provider Information** sections will be updated for this change request.



File Attachments

Use the **File attachments** feature to attach one or more supporting documents to the Implementation Request Form. The **Manage form attachments** link on the form allows the AE to add & delete attachments to the form. The AE may add, view or delete attachments when using the following form types:

- Begin a new request,
- Begin a new advance notification, or
- Convert an advance notification to a full form.

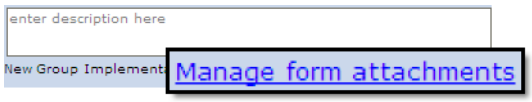
Note: Once the Implementation Request is submitted to the IC, any additional attachments must be sent via email to Implementation@davisvision.com.

The IC will have read-only access to the attachments on the Implementation Request form and the Home Page.

TIP: Use the Home Page to view & access the attachments without opening the form.

To include attachments to the form:

1. Click the **Manage form attachments** link to attach a file.

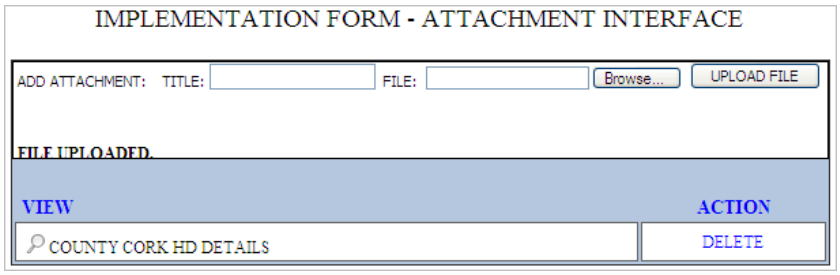


The **Implementation Form - Attachment Interface** window is displayed:

Note: Attachments can only be uploaded and/or viewed when you are connected and logged on to the system. For e.g.: an attachment will not be accessible if the form is viewed offline.

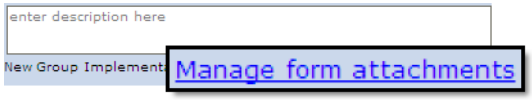
To attach a document to the form:

a. Enter a Title in **Title** field.
b. Press the **Browse** button to locate and select the supporting document to be attached.
c. Press the **UPLOAD FILE** button to attach the supporting document to the form.
d. Repeat Steps 1a-c to upload additional attachments.
e. Press the button to close the **Implementation Form - Attachment Interface** window and return to the form.



To view an attachment on the form:

a. Click the **Manage form attachments** link to access the **Implementation Form - Attachment Interface** window.



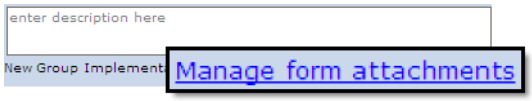
b. Press the **View** icon (**)** under the **VIEW** column.
The selected file opens in a new window.

Note: This is a read-only view of the attachment; any additions made to the attachment will **not** be saved. In order to modify the contents of the document, changes should be made to the source document and re-attached to the form.

c. Press the button to close the **Implementation Form - Attachment Interface** window and return to the form.

To remove an attachment from the form:

a. Click the **Manage form attachments** link to attach a file.



b. At **Implementation Form - Attachment Interface** window, press the **DELETE** link under the **ACTION** column.
c. Repeat Step b, to remove additional attachments.
d. Press the button to close the **Implementation Form - Attachment Interface** window and return to the form.

Open Enrollment

This section details Open Enrollment information.

If Open Enrollment is selected as "Yes", the following fields in the **Open Enrollment** section must be completed to submit the final form to the IC:

- Open Enrollment Dates
- Web/IVR control # needed
- Materials Needed (DV to provide)
- Date panel Needed
- Custom Phone Number Required

Note: If a New Advance Notification form is being used, it allows the ability to request materials in advance of the benefit effective date. For e.g.: Advance notification to the Documentation department to create materials needed for the Open Enrollment period and the Provider Panel to be established in the system.

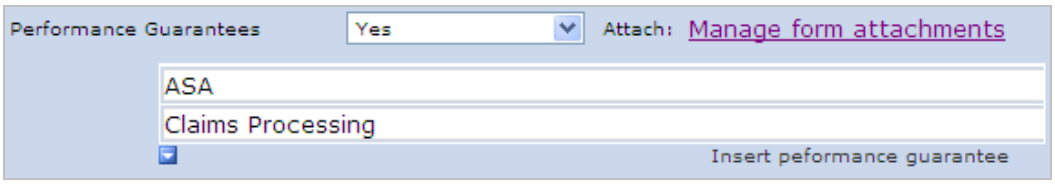
Group/Company Contact Info

This section includes the Group name, address and main contact information. In addition, it contains the Contract period, type of group, performance guarantees, and other custom arrangements.

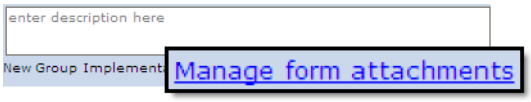
Performance Guarantees

To include performance guarantees to the form:

1. Selecting '**Yes**' option in the **Performance Guarantees** field. This displays the option to attach one or more supporting documents (if available) for performance guarantees.
2. Place cursor in the first text field and enter the performance guarantee.
3. Click the blue arrow icon to insert additional performance guarantees.
   Note: Insert one or more Performance guarantee specification by clicking the **Insert performance guarantee** link.



4. To add an attachment, click the **Manage form attachments** link to attach a file.

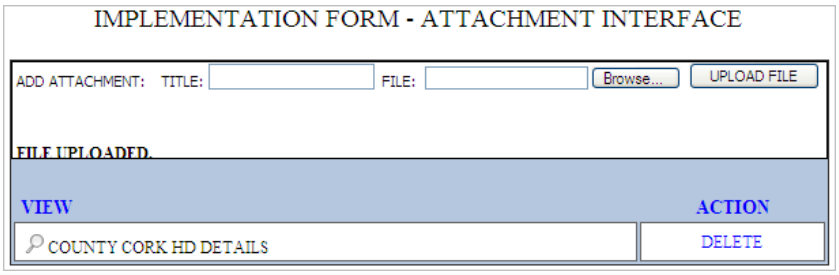


   The **Implementation Form - Attachment Interface** window is displayed:

   Note: Attachments can only be uploaded and/or viewed when you are connected and logged on to the system. For e.g.: an attachment will not be accessible if the form is viewed offline.

   To attach a document to the form:

   a. Enter a Title in **Title** field.
   b. Press the **Browse** button to locate and select the supporting document to be attached.
   c. Press the **UPLOAD FILE** button to attach the supporting document to the form.
   d. Repeat Steps 4a-c to upload additional attachments.
   e. Press the button to close the **Implementation Form - Attachment Interface** window and return to the form.



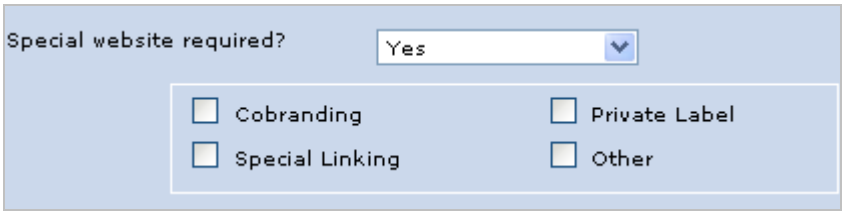
Refer to the View Attachments and Remove Attachments sections for further details.

To remove performance guarantees from the form:

1. Place the cursor at the item to be removed and right-click the grey arrow icon.
2. Select the **Remove** option to remove the attachment from the form.

Special website required?

Selecting the '**Yes**' option displays additional checkbox fields to define attributes of the website.

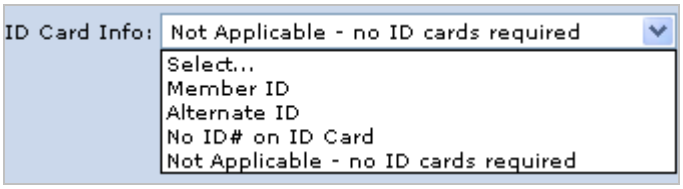


Eligibility

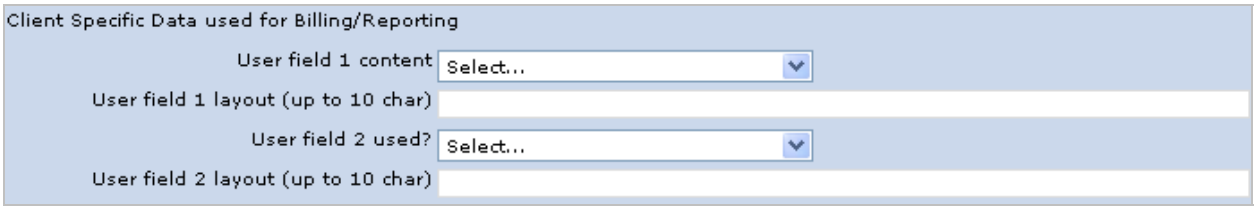
The Eligibility section defines the membership details of the implementation. It defines the individuals covered and their benefit entitlement to the benefits that are offered. All fields containing a red asterisks * is a required field. For example, the ID Numbers drop-down menu defines the type of membership ID to assign to members.

ID Card Info

Indicates the type of ID (if used) displayed on the ID card to identify the member. ID Numbers are used to identify membership through the Member ID, an Alternate ID or both. Use the **Eligibility Special/Instruction Notes** field to describe client supplied member identification formats.

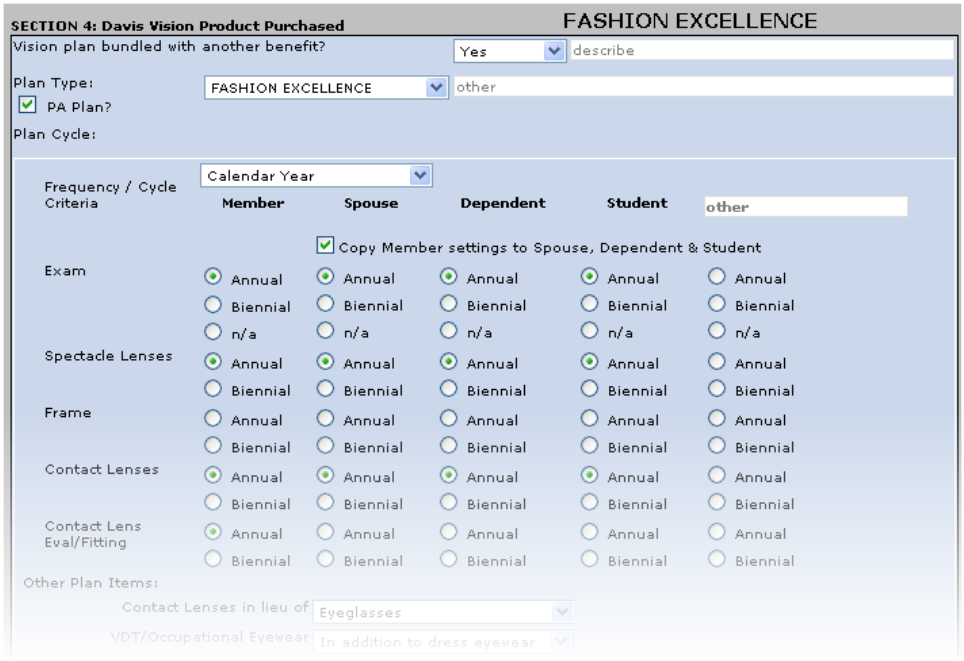


Client Specific Data used for Billing/Reporting



Product(s) Purchased

This section describes the benefit plan sold.



Plan Type

Use the **Plan Type** drop-down menu to select the type of plan and associated cycle details.

If the Group has more than one benefit plan, add another plan type by:

1. Scrolling to the bottom of the **Product(s) Purchased** section.
2. Clicking the **Insert additional Plan** link.

This will create a duplicate plan, allowing you to make changes to the additional plan as necessary.

Frequency/Cycle

The **Cycle Criteria** section defines the frequency in which the benefit is available to members, spouses and dependents. For example, if the same cycle criteria apply to a member' spouse and dependents, use the **Copy Member settings to Spouse, Dependent and Other** checkbox to indicate this setting.

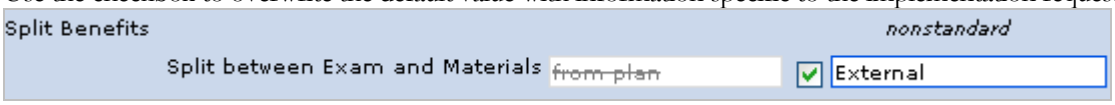
If a *benefit plan* has more than one option for benefit frequency, add another set of cycle criteria by:

1. Scrolling to the bottom of the **frequency/cycle** section.
2. Clicking the Insert additional cycles link.

This will create a duplicate frequency/cycle section, allowing you to make changes as necessary.

Split Benefits

Use the checkbox to overwrite the default value with information specific to the implementation request.

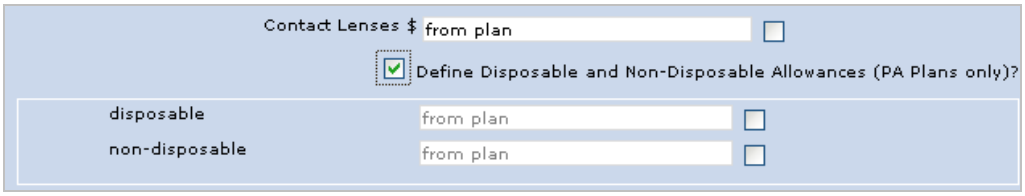


Non-plan Allowances

The following fields display varied information based on the value selected in the **Frame Allowance** drop-down menu:

- Frame $
- Retail Frame % Overage Discount
- Single Vision Lenses $
- Bifocal Lenses $
- Trifocal Lenses $
- Lenticular $
- Contact Lenses

Note: For PA plans only, check the **Define Disposable and Non-Disposable Allowances (PA Plans only)?** field. Additional allowances available only on PA plans will appear.



Indemnity (OON) Reimbursements

Select one of the following values in the **Indemnity (OON) Reimbursements** field:

- **No**: Displays the individual amounts are shown as **n/a**. Overwrite with a nonstandard value as necessary.
- **Yes (Std)**: Displays individual default amounts setting the **Total Flat Reimbursement Amt** field to **n/a**.
- **Yes-Flat Amt**: Displays the individual amounts are shown as **n/a**. Overwrite with a nonstandard value as necessary.
- For PA plans only, check the **Include Other Reimbursements (check if PA Only plan)?** field to specify additional details.

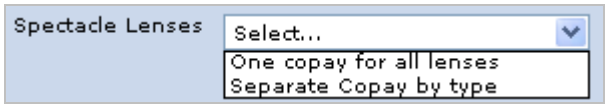
Basic Plan Co-Payments

The following fields must be completed to submit the final form to the IC:

- **Office visit Co-pay (applied to any service):** Select the **'Yes'** value to define co-pay amount.
- **Eye Examination Co-pay**: Select the amount from the drop-down choices.

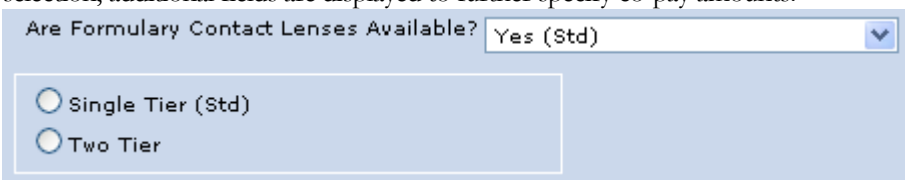
To define **Frame and Lenses Co-payments,** complete the following:

- **One Co-payment for frame and lenses?:**
  - Select **'Yes'** to enter a single co-pay amount for all materials (frame and/or lenses).
  - Select **'No'** to specify separate co-pay amounts for frame and lenses.
  - Select the appropriate value from the **Spectacle Lenses** drop-down menu to further define co-pay amounts for Spectacle Lenses.



Are Formulary contact lenses available?

Select **'Yes (Std)'** to specify if this setting applies to **Single Tier (Std)** or **Two Tier** formulary. Based on the selection, additional fields are displayed to further specify co-pay amounts.



Billing/Rates

This section includes all billing, fees, and rates pertaining to the Group. Also identifies fields to specify billing methods to the group, payment methods to providers, claim, and lab payments.

Insured?

At the **Insured?** field, select the following options as necessary:

1. Select **'Insured thru HM Life' or 'Capitated (not thru HM Life)'** to display and specify tiers and insured/capitated billing rates.
2. Select **'Self-insured'** to display and specify **ASO/ Admin Fee** fields.
3. Select **'Other'** to define other arrangements by having both the billing rates and Admin Fee fields available for inputs.

Lab Schedule

Based on the values selected in the **Lab Schedule** and **Plan Type** fields, the appropriate Material/Lab Fees are displayed.

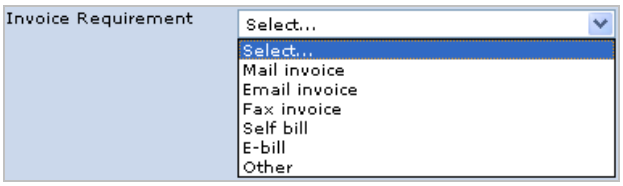
Correct Combinations:

- Insured or Capitated → Capitated Lab Schedule
- Self-insured → FFS lab schedule

Invoice Requirement

Select the appropriate method to invoice the Group.

Note: For E-bill, follow e-bill instructions by completing e-bill form(s) required to setup the e-bill invoice method.



Billing Electronic Paid Claims File Requirement

This field indicates the method used by the Davis Vision Billing department to send billing invoices to the client, for e.g.: Email, Mail, etc.

Note: The choice selected here does not impact the Electronic Claims File Utilization report provided by the Davis Vision Data Management team.

Broker

This section defines if payments are made to the agency or brokers in this section. Insert one or more Brokers by clicking the **Insert additional broker** link.

Provider Information

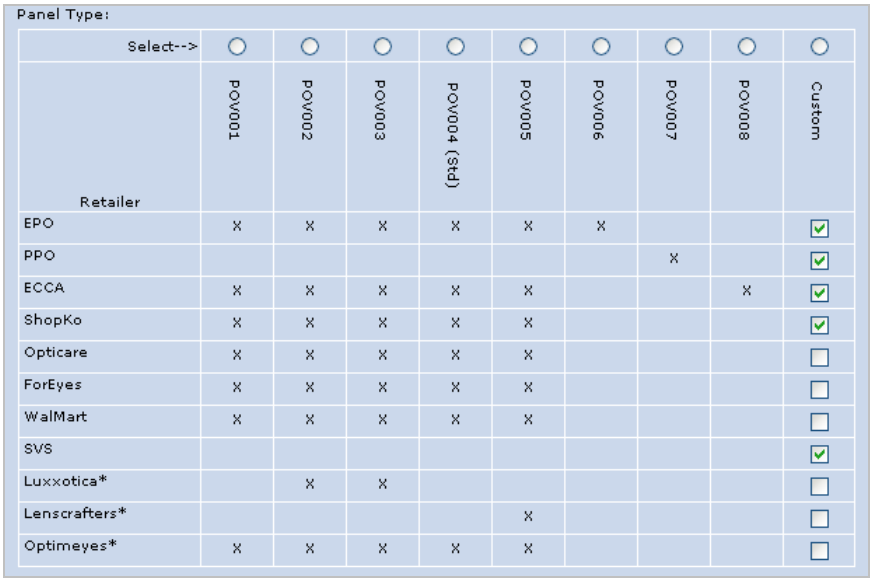
This section describes the provider network and coverage area.

Panel Type

Based on the implementation request, complete one of the following:

- Select the radio button of one of the default panel types, or
- Use the **Custom** radio button to customize a panel type as shown in Figure 6.

Figure 6: Custom Panel Type



Panel Region

Panel Region selects all 5 regions by default, but maybe customized based on the implementation request.

Retailers (non-standard)

Provider Relations management approval is required for the non-standard retailers listed. Additional supporting information on the Retailer sheets maybe added to the **Special Instructions/Notes** section, located at the bottom of the **Provider Information** section.

Professional fees – Payment to Doctors (Std Listed)

This field displays the standard fees paid to the doctors. The values are populated from the **Professional Fees** table maintained by the IC. Modify the value, by checking the override box, and entering the professional fees listed on the proposal for a Fee for Service group.

Note: The Underwriting Tracking Form is used for Capitated groups.

Member Communication

This section contains the various communications materials, which may be created and/or provided by Davis Vision. Materials listed include both member and provider communication materials.

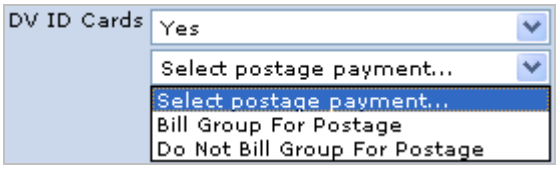
Vision Care Summary Benefit Brochure

Selecting '**Yes**' from the **Vision Care Summary Benefit Brochure** drop-down menu automatically set the **Web Brochure** field to '**Yes**' also.

DV ID Cards

Selecting '**Yes**' from the **DV ID Cards** drop-down menu displays a drop-down menu to define postage payment. The standard value is 'Bill the Group for postage'. Manager approval is required if the group will not be billed. Enter the approving manager's name in the text field next to the **DV ID Cards** drop-down menu.

Figure 7: DV ID Cards



Initial Mailing

Initial Mailings indicates how the member materials will be distributed to the members when the group is initially implemented.

New Hire Packages

New Hire Packages are group specified materials sent to the new employees of the implemented group.

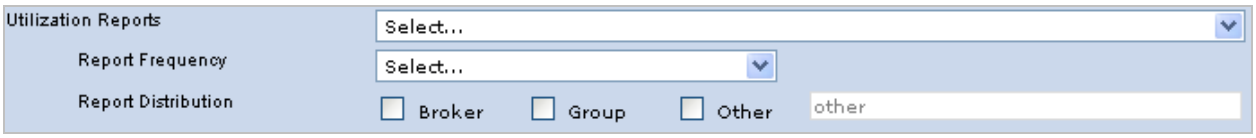
Reporting

This section contains reports that can be provided at the request of the client. Reports are not typically "offered", but are provided when specifically requested.

Utilization Reports

Select the appropriate option if the Client requires reporting on the utilization patterns of its membership. Use the **Report Frequency** drop-down menu to indicate reporting frequency. Select one of more **Report Distribution** checkboxes to indicate the report recipients.

Figure 8: Utilization Reports



Government Program Files

If Government Program Files are required, select the **Required** option from the drop-down menu and checkboxes displayed.

Figure 9: Government Program Files

Chapter

5

Save & Retrieve the Implementation Request Form

Saving to a location (shared network or desktop)

PA Users

To save a form to on the terminal server:

1. With the form open, click **File** from the toolbar and select the **Save As** option.
2. At the **Microsoft Office InfoPath** prompt, press the **Save As** button.
3. At the **Save As** prompt, select the **Desktop** icon, and press the **Save** button.

Note: This saves a copy of the form without submitting it to the IC, to the terminal server's desktop location. This also allows it to be continually updated until the form is ready to be submitted.

IMPORTANT

All required fields with a red asterisk (*) must be complete in order to submit the form to the IC. An error message will be displayed, to indicate incomplete required fields.

Regular Users

To save a form to a location such as a shared network folder or desktop:

1. With the form open, click **File** from the toolbar and select the **Save As** option.
2. At the **Microsoft Office InfoPath** prompt, press the **Save As** button.
3. At the **Save As** prompt, navigate to a network or desktop location and press the **Save** button.

This saves a copy of the form without submitting it to the IC. This also allows it to be continually updated until the form is ready to be submitted.

IMPORTANT

All required fields with a red asterisk (*) must be complete in order to submit the form to the IC. An error message will be displayed, to indicate incomplete required fields.

Retrieve Implementation Request Form

PA Users

To retrieve a saved form:

1. First, access the Remote Desktop icon as detailed in the PA Users section on page 8.
2. Locate the Implementation Request Form saved to the terminal server's desktop location.
3. Select and open the Implementation Request Form.

Regular Users

To retrieve a saved form:

1. From the desktop, double-click to open the Microsoft Office InfoPath

icon.
2. Click **File** from the toolbar and select **Open** option.
3. At the **Open** prompt, navigate to the location where the saved Implementation Request Form resides.
4. Select and open the Implementation Request Form.

Proceed to enter additional information and save the form as described above or submit the completed form to the Implementation Coordinator (IC) as described in the Send Implementation Request Form to IC section on page 33.

Chapter

6

Send Implementation Request Form to IC

To submit a new request or advance notification to the Implementation Coordinator (IC):

1. With the form open, click the Submit Form to IC button located on the bottom of the **Main** section.

IMPORTANT

All required fields with a red asterisk (*) must be complete in order to submit the form to the IC.
An error message will be displayed, to indicate incomplete required fields.

2. A confirm message to indicate a successful form submission will be displayed.
3. Press the **OK** button to complete the process.
4. Close the submitted form. It will remain open in your browser until you exit the form.

Once a form is submitted to the Implementation Coordinator, it may only be viewed by the AE and authorized designee. The IC can access all submitted forms.

Note: An AE can only submit a form once. The Submit Form to IC button changes to Close form once a form is submitted.

To view submitted forms:

1. Press **F5** key on the keyboard to refresh the **Implementation Request Form Home Page**.
2. Click the **View** link of the submitted form.
3. At the **File Download** prompt, click the **Open** button to view the form contents.

Chapter

7

Logoff Implementation Request Form

PA Users

To logoff the Implementation Request Form from the terminal server:

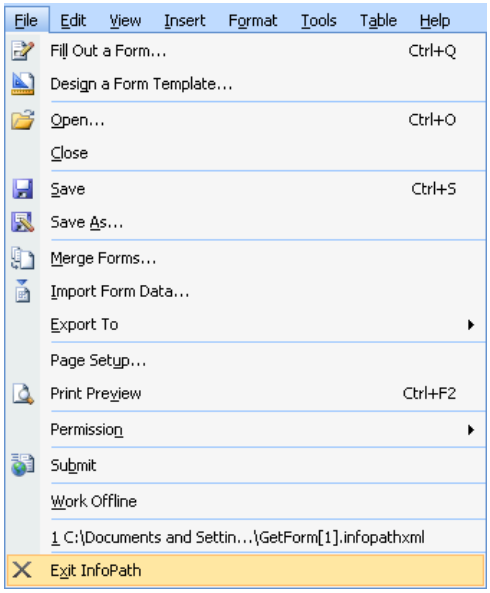
1. Press the **Start** menu and select the **Log Off** option as displayed in Figure 10.

   Note: Do not press the ☒ in the yellow pane locate at the top of the terminal server window.

   Figure 10: Terminal Server Logoff.

Regular Users

To logoff the Implementation Request Form:

1. With the form open, click **File** from the toolbar and select the **Exit InfoPath** option as displayed in Figure 11.

   Figure 11: Exit InfoPath