Quick Reference Guide

Processing a Work Request for Examiners

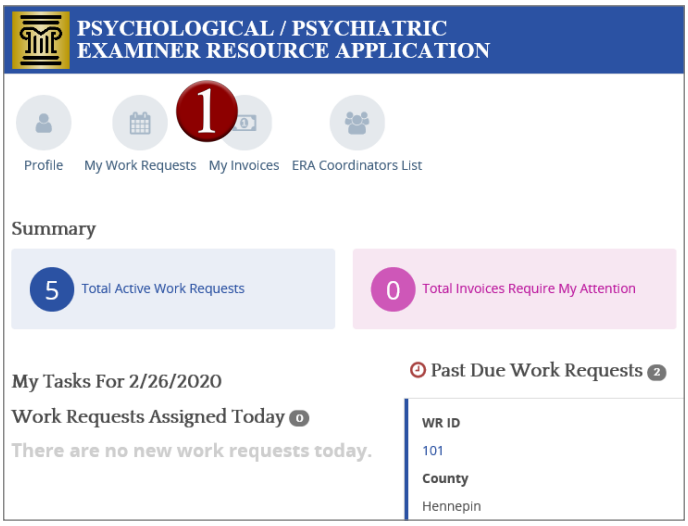
Review the work request

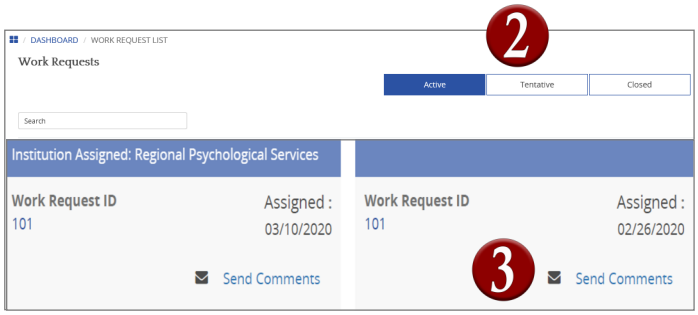
1. Click **My Work Requests**.
2. Review Active, Tentative, and Closed work requests. If a work request was assigned by an institution the institution name displays above the work request.
3. Click **Send Comments** to send comments and questions to the Examiner Resource Application (ERA) Coordinator.
4. Select a **Comment Type** from the dropdown, and enter information as needed.
5. Click **Send Comment**. The ERA Coordinator will receive an email and review the submission.

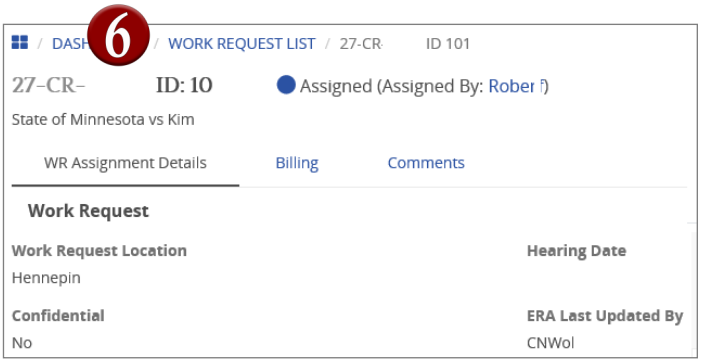
When a work request is sent for an exam in a confidential case, a coordinator will select an examiner to perform the work and the work request will then appear in the examiner's dashboard as a Tentative Work Request.

6. Click **Tentative** work requests to view the case and exam information (step 2). If the work request is confidential and you have not conducted the type of exam listed in the work request details, contact the ERA Coordinator.

If there are questions about a conflict of interest on any work request, contact the ERA Coordinator. If a conflict of interest is identified, the specific examiner can not take this work request. Close the work request with that reason (see page 5).



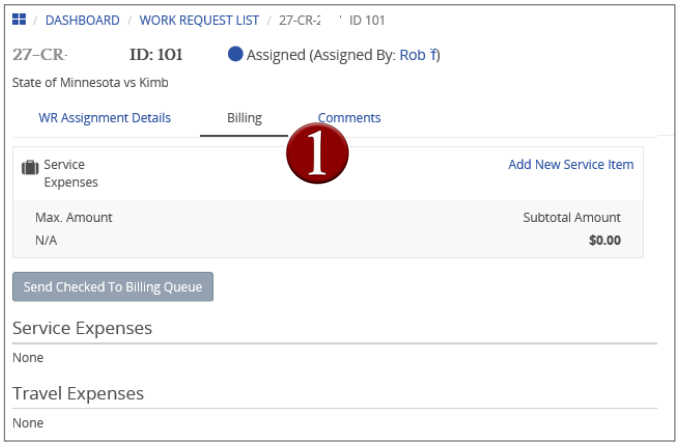


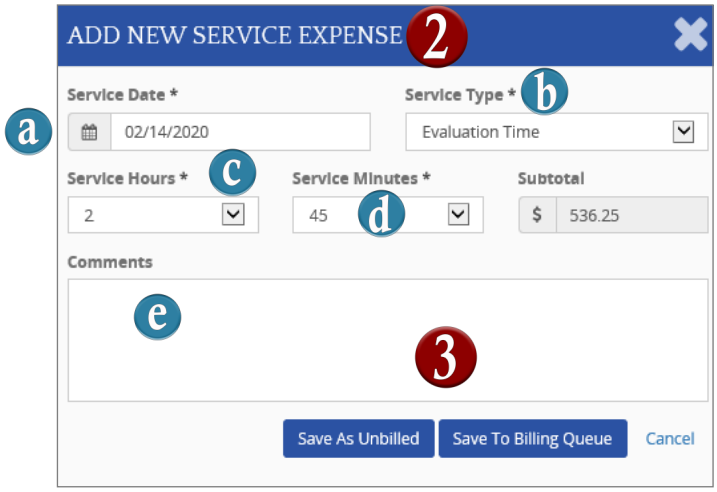


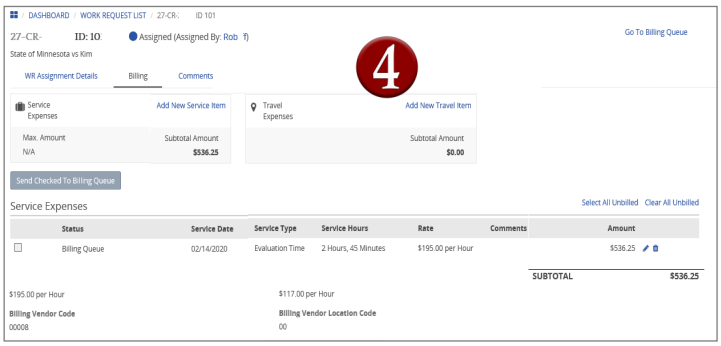
Processing a Work Request for Examiners

Add a service or travel expense

1. Click **Billing** on the work request, then **Add New Service** Item.
2. Select the below information:
   a. Service Date
   b. Service Type
   c. Service Hours
   d. Service Minutes
   e. Add Comments
3. Click **Save to Billing Queue** to save to the billing queue for submission. Repeat steps 1 and 2 for each service. Click **Save as Unbilled** to save the information and submit it later.
4. When all services are complete, enter in travel expenses. Click **Add New Travel Item**.

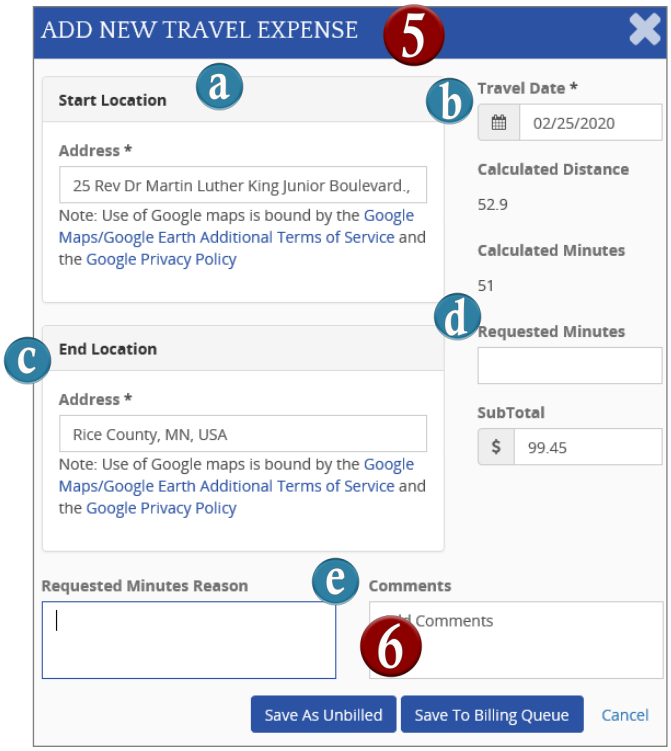






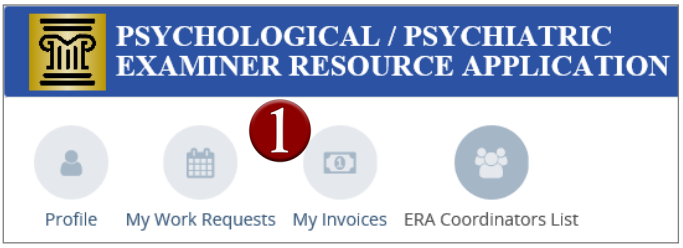
Processing a Work Request for Examiners

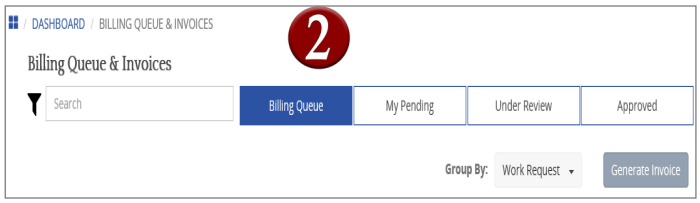
5. Enter the travel information:
   a. Start Location
   b. Travel Date
   c. End Location
   d. Requested Minutes (when requesting additional minutes beyond the calculated amount)
   e. Requested Minutes Reason or Comments.
6. Click **Save to Billing Queue** to save to the billing queue for submission. Repeat steps 4-6 for each travel expense. Click **Save as Unbilled** to save the information and submit it later.
7. Click **Go to Billing Queue** to submit the invoice.



Review and submit invoices

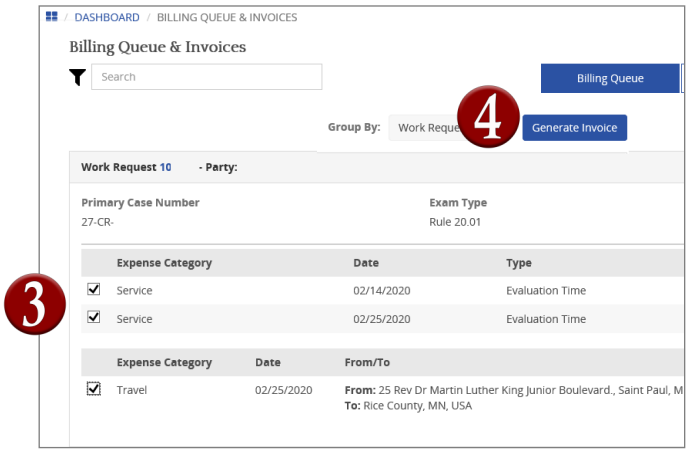
1. Click **My Invoices**.
2. Click **Billing Queue**.

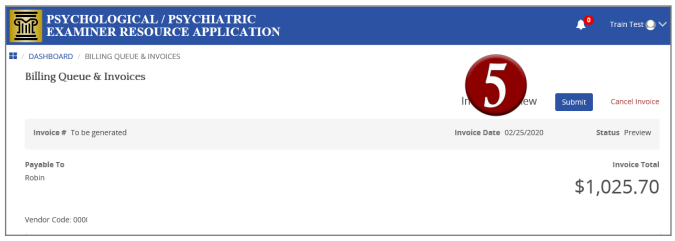


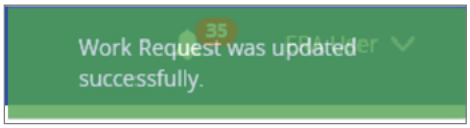


Processing a Work Request for Examiners

3. Under the billing queue tab, check the boxes next to each expense category.
4. Click **Generate Invoice**.
5. Click **Submit**. The invoice will then be sent to the Level 1 approvers.

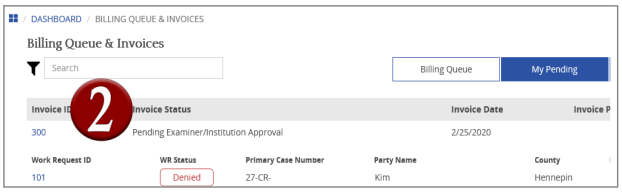






Edit a denied invoice

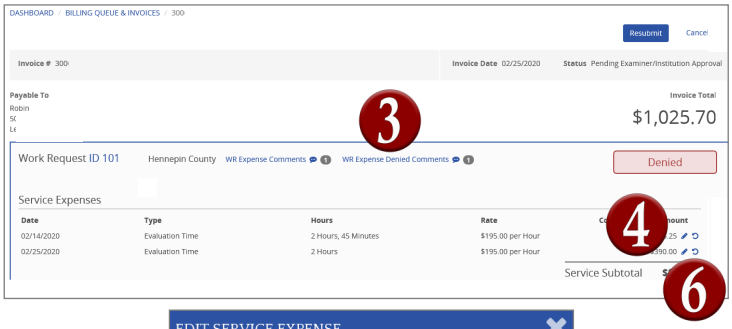
1. Click **My Invoices** or **Total Invoices Require My Attention**.
2. Click the **Invoice ID**.

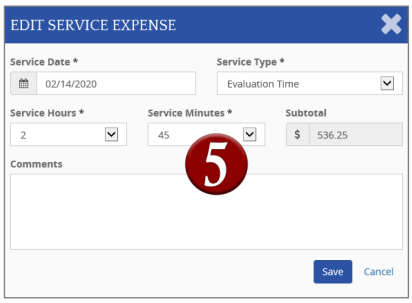


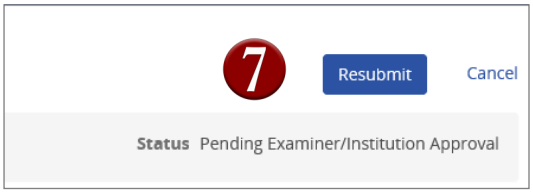
Processing a Work Request for Examiners

3. Click the **WR Expense Denied Comments** to view the denial reasons.
4. Click the pencil icon across from the service or travel expense to edit.
5. Make changes to the expense, and click **Save**.
6. Click the refresh icon to remove an expense from an invoice, and click **Save**.
7. Click **Resubmit** at the top.

Examiners can edit or remove an existing expense. If a new expense needs to be added, the examiner will need to enter the new expense on the work request and generate a new invoice.

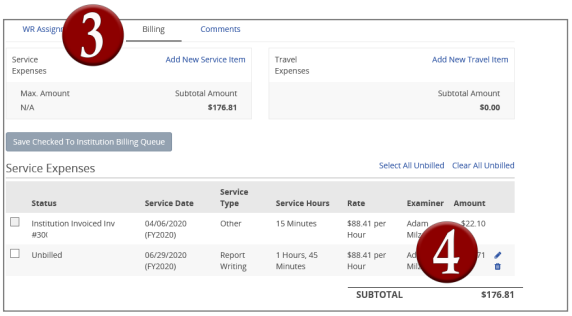




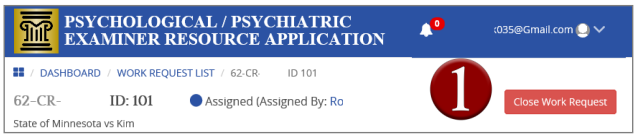
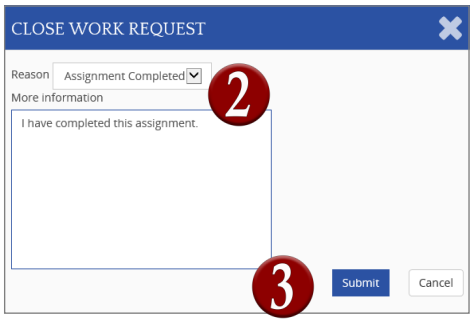
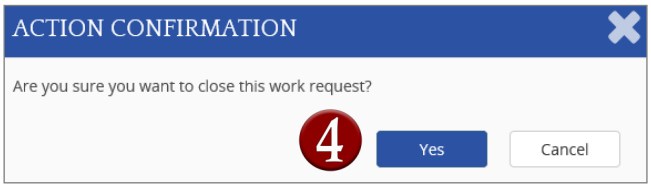


Delete an unbilled expense

1. Click **My Work Requests**.
2. Click the Work Request ID number.
3. Click **Billing**. Any expenses that have not been sent to the billing queue are listed as unbilled.
4. Click the trash can across from the service expense.



Processing a Work Request for Examiners

Close a work request

1. From the work request details page, click **Close Work Request**.
2. Select a reason from the reason dropdown and enter more information if applicable. Reasons:
   - The assignment is complete.
   - You were dismissed from the case.
   - The case is dismissed.
   - There is a conflict of interest.
3. Click **Submit**.
4. Click **Yes** in the dialog, and the work request will change to the closed status.