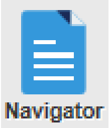
Navigation and Overview of Smart Forms

Step	Action
1.	Click the **NavBar** and then Click the **Navigator** button. 
2.	Click the **Data Change Request** menu. Data Change Request
3.	Click the **Smart Forms** menu. Smart Forms
4.	Click the **Forms Collection** menu. Forms Collection
5.	Smart forms are available in the **PHRST Data Change Center.** Change form tabs are displayed depending on the security access.
6.	When the **HR Data Change Forms** tab is selected, the links for the HR forms are available. Click the **HR Data Change Forms** tab HR Data Change Forms
7.	When the **Benefits Data Change Forms** tab is selected, the links for the Benefits forms are available. Click the **Benefits Data Change Forms** tab Benefits Data Change Forms
8.	When the **Payroll Data Change Forms** tab is selected, the links for the Payroll forms are available. Click the **Payroll Data Change Forms** tab Payroll Data Change Forms
9.	When the **T&L/eSTAR Data Change Forms** tab is selected, the links for Time and Labor/eSTAR forms are available. Click the **T&L/eSTAR Data Change Forms** tab T&L/eSTAR Data Change Forms

Step	Action
10.	When the **Benefit Refund/Adjustment** tab is selected, the link for the **Benefit Refund/Adjustment** form is available. Click the **Benefit Refund/Adjustment** tab Benefit Refund/Adjustment
11.	Under each form is the option to **Add** a new form. **One-Time Benefit Refund/Adjustment** form is used as an example. Click the **Add** link Add
12.	The Icons displayed at the top of the page allow the user to perform actions for the form. The Action icons are discussed in detail in **How to use Icons on Smart Forms** topic.
13.	The first section of the form is for tracking purposes and updates when the form is saved.
14.	The **Form Header** section is automatically populated from the End User's profile.
15.	All required fields must be completed. **Note:** Required fields are identified by the asterisk "*". Click the **scrollbar**.
16.	At completion of data input, revisions may be applied to the form and saved. Hover on the **Save** Icon.
17.	Click the **Save Form** button. Save Form
18.	The form is saved successfully. **Note:** All information in the first section (**Form Instance**, **Created By, Creation Date/Time**, **Approval Status**, **Updated By**, **and Updated Date/Time**) is automatically populated and the **Form Instance** number is generated.
19.	After the form has been saved, changes can still be made and the form may be saved again.
20.	To submit a form for processing, **Workflow** must be applied. Hover over the **Workflow** Icon.
21.	The **Submit** button of the **Workflow** action will open the **Workflow** page. Click **Submit**. Submit

Step	Action
22.	The **Workflow** page opens. To submit the form into **Workflow**, click the green Check mark "**OK**". Click the **OK** button. OK
23.	The **Approval Status** changes from **Initial** to **In Workflow**.
24.	To view forms previously created, click the **View** link. **Employee Review** form is used as an example. Click the **View** link. View
25.	One or multiple search criteria can be entered to view forms. For this exercise, do not enter any search criteria.
26.	Click the **Search** button. Search
27.	The message "No **matching values were found.**" is displayed if there are no forms created.
28.	Click the **Approval Status** list.
29.	Click the **In Workflow** list item. In Workflow
30.	Click the **Search** button. Search
31.	All the forms created with the **Approval Status "In Workflow"** display.
32.	To view all the forms created, do not enter any other criteria.
33.	All the forms created are displayed. The **Approval Status** is **In Workflow** for one form and **Initial** for the other. The form with **Approval Status** "**In Workflow"** indicates that it is submitted for processing. The form with the **Approval Status** "**Initial**" indicates that it has not been submitted into **Workflow,** but is saved. The form does not reach the Central user until submitted. The End-user can make any changes in the form even at this point to submit.
34.	Click the link for the desired result, for example the **0000000882** link. 0000000882
35.	The form opens for revision or submittal.

Step	Action
36.	Hover over the **Workflow** Icon.
37.	Click the **Submit** button. 
38.	The **Workflow** process is complete once the **OK** button is selected. Click the **OK** button. 
39.	To exit the form, use the **X (Close)** in the upper right hand corner of the application. Click the **Close** button. 
40.	The **Approval Status** has changed to **In Workflow** from **Initial**.
41.	Congratulations! You now know how to: - Navigate to the **Forms Collection**. - Create/**Add** a new Data Change Request. - **Save** and **Submit** a Data Change Request into **Workflow**. - **View** the created Data Change Request forms. **End of Procedure.**