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- Create multi-record referrals and consults
- Full consult workflow

There are several new, interesting features available in FOIAonline. This quick guide serves as an introduction to these features and how they can help FOIA processing in the system.

With these new features, you can:

- **Manage PDF letters to be used with requester communication.**
- **Generate and edit PDF letters attached with emails to the requester.**
- **Comment on assignments made to organizations or individuals.**
- **Track payments made on a request.**
- **View requesters who are delinquent in paying their invoices.**
- **Create referrals or consultations with multiple records.**
- **Perform the full spectrum of consultation processing activities.**

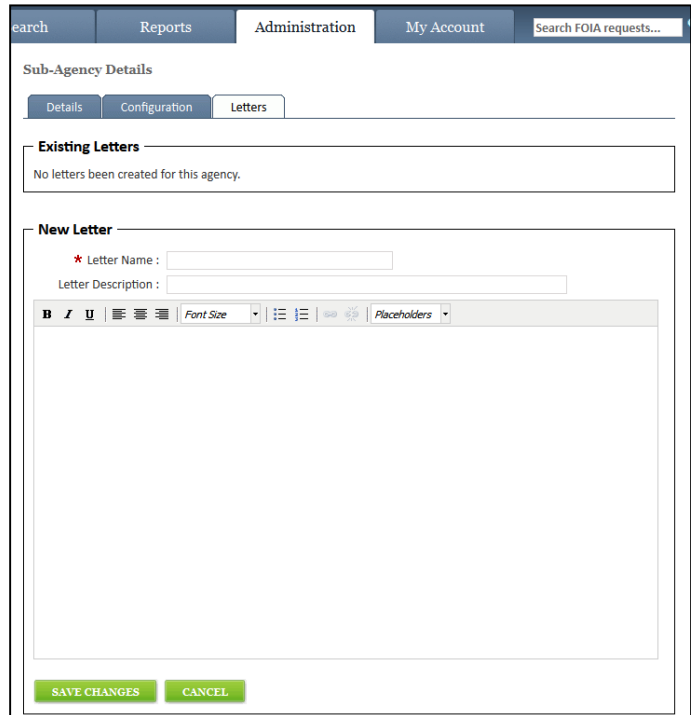
New Feature!

Create and Manage Agency Letters

Did you know...?

You can now **create letter templates** to be used within a level 1 or 2 agency?

Create letters on the Administration – Letters tab which can then be used when corresponding with a requester.



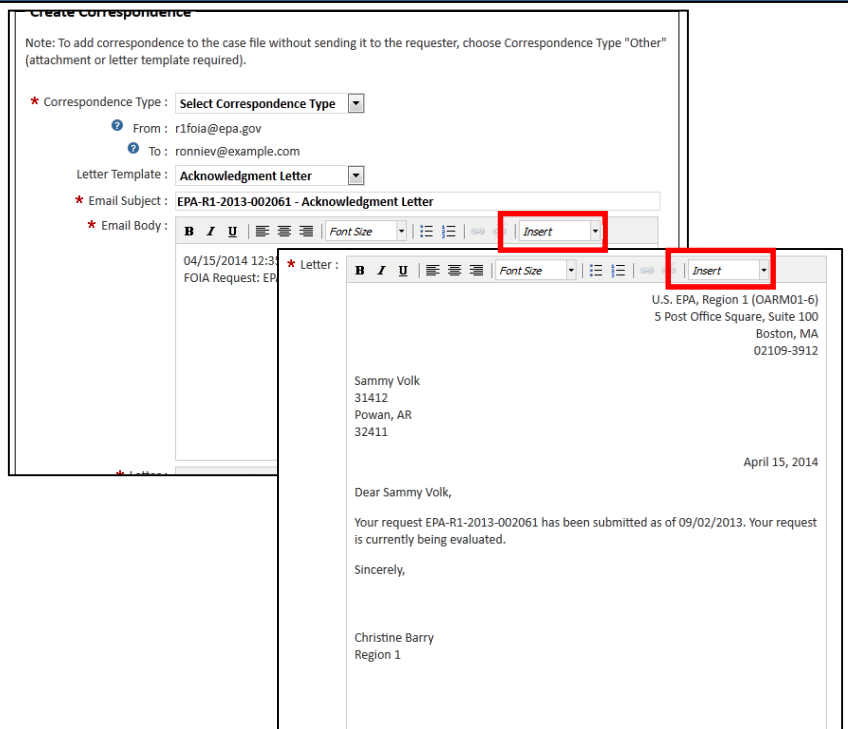
New Feature!

Generate and Edit Letters When Corresponding

Did you know...?

You can now **generate and edit emails and letters** including information directly from the request?

Look for the **insert** dropdown next in the formatting bar to input request information (tracking number, requester name, etc.).



New Feature!

Create Comments While Assigning

Did you know...?

Did you know.....You can now **comment while assigning** the case file?

Let an organization know which individual you believe should receive the assignment. All comments created within a case file are now identified within the Comments tab.

Make Assignment

Organization Assignment : 

Individual Assignment : 

5 Day Notifications : ☐

Assignment Comments :

Submission Details Case File Admin Cost Assigned Tasks **Comments (2)** Review

Date / Time	User Name	Detail
04/15/2014 12:55 PM	Christine Barry	
04/15/2014 12:55 PM	Christine Barry	

New Feature!

Track Multiple Payments

Did you know...?

Did you know...You can now **save invoices AND track multiple payments?**

Clicking the Generate Invoice action saves the invoice to the Financing tab. The new Payments section tracks the date and amount paid against the invoiced amount.

Records Consultations Correspondence Appeals **Financing** Restricted Materials

Invoice

Title	Invoice Date	Amount
EPA-HQ-2014-000083 Invoice 20140415.pdf	04/15/2014	\$526.00

Payments

Date	Amount	Edit	Remove
04/15/2014	\$100.00		
04/15/2014	\$120.00		

ADD PAYMENT

New Feature!

Create Referrals and Consultations with Multiple Records

Did you know...?

Did you know.....You can now **associate multiple records** to a single consultation or referral?

Both participating and non-participating referrals and consultations can be created with one or more records attached.

Referral Confirmation

Referral Information

New Referrals	Records
PBGC-2014-000004	CC Repository Siting Results Memo 03-12-10 Citizens Ranking Executive Summary_12 Mar_Rev 1 comm_contact_list_july2010

[BACK TO REQUEST DETAIL](#)

New Feature!

Full Consultation Processing

Did you know...?

Did you know.....You can now **manage the consultation work products** throughout the life of a consultation?

The expanded consultation functionality mimics functionality available on requests and referrals.

My Cases

Unassigned Cases

Assigned Cases

Consultation Details

Make Assignment

Extend Due Date

Create Task

Upload Responsive Records

Create Correspondence

Create Comment

Export Consultation

Begin Close Out Process

Print Case File

Consultation Details

Status : Research Records Due Date : 04/18/2014



Consultation Details

Tracking Number : EPA-HQ-2014-000097 Submitted Date : 04/11/2014
 Requester : Jennifer Oxford Last Assigned Date : 04/11/2014
 Organization : N/A
 Requester Has Account : Yes

[Submission Details](#) [Case File](#) [Admin Cost](#) [Assigned Tasks](#) [Comments \(1\)](#) [Review](#)

Consultation Handling

Consultation Track : 5 Day Notifications: ☐

Request Description

Short Description :
 Description Available to the Public : No Has Description Been Modified? ☐

Attached Supporting Files