MAST Training: Job Aid
Create a New Request

Objective

To provide users with steps on how to submit general SSD requests in MAST.
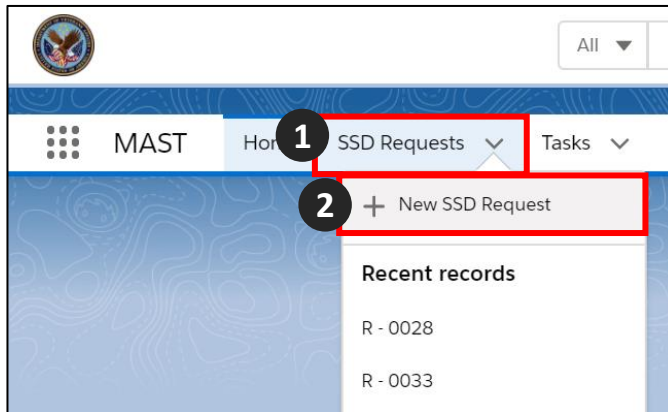
Audience

User: Requestor, Supervisor, Employee, Facilities Manager
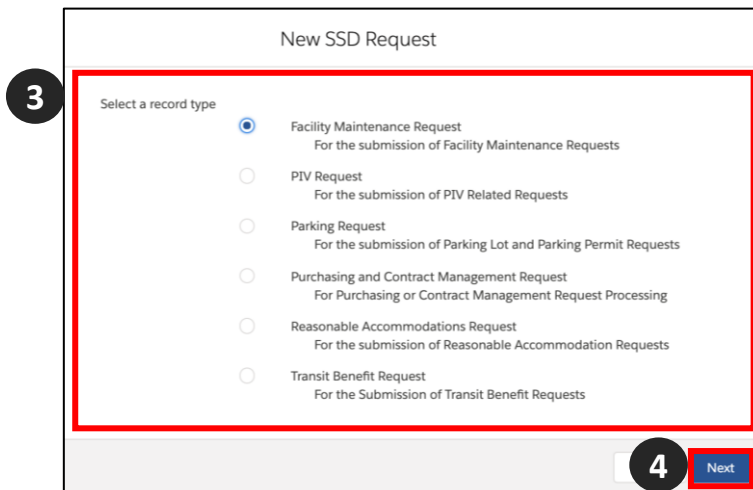
Instructions

Pre-Step: Access the **MAST** Homepage via https://va.my.salesforce.com/
1.   **Click** on the **dropdown arrow** to the right of the **SSD Requests tab**.
2.   **Select New SSD Request**.

3.   **Select** the **Type of Request** *(Facility Maintenance, Purchasing, etc.)* from the pop-up listing**.**

Note: RMO (Records Management Officer), Security, and Safety requests can only be created/viewed by Supervisor and SSD Employee.

4.   **Click Next**.

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5. **Fill out** the **required information** on the request form under the General Request Information.

Note: Information fields will vary depending on request type, however any field marked with a red * is a required field that will need to be completed prior to submitting the request.

      a.   **Station:** Select the station for the request.
      b.   **Sub-Category:** Select the specific category the request falls under (This will vary for each type of request).
      c.   **Description:** Fill out this free form field with any other additional information that adds further detail to the request.
      d.   **Facility:** Type in the facility name to search for the facility, or click **Enter** to pull up the list of facilities that match the search words entered. User must select the appropriate facility that the request pertains to.
      e.   **Severity Level**: Select the severity level from the drop down that corresponds with the need of the request (Low, Medium, High).
      f.   **Comments:** Fill out the free form field with any additional comments the user would like to attach to the request. (Optional)

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General Request Information	
* Station	* Facility
--None--	Search SSD Facilities...
Record Type	* Sub-Category
Parking Request	--None--
* Description	Comments
* Severity Level	
--None--	

Note: For all requests other than RMO or Reasonable Accommodations, skip to step 8.

6. **RMO Requests: Fill out** the required information under the **Processing Information Section** for RMO requests
    a. **Status:** User selects a status from the dropdown.
    b. **Sub-Status:** User selects a sub-status from the dropdown.
    c. **PRAD (Privacy and Records Assessment Division) Sub-Task: Select** the appropriate sub-task from the listed options in the left side box under **"Available". Click** the **right arrow** to choose the desired sub-task. **Click** the **left arrow** to remove the selection.
    d. **PRAD (Privacy and Records Assessment Division) Checklist Sub-Task: Select** the appropriate sub-task from the listed options in the left side box under **"Available". Click** the **right arrow** to choose the desired sub-task. **Click** the **left arrow** to remove the selection.

Note: The other fields in the Processing Information section are entered when completing an RMO request.

7. **Reasonable Accommodations Requests:** The **Date Required** and **Desired Locations** fields under the General Request Information section are required when creating this request type.

8. **Fill out** the **requestor information** on the request form. If the person impacted is same as the requestor, **Check** the **Person Impacted is Same as Requester** box.

9. **Select Submitted** in the drop-down menu under processing information section of the request.
10. **Click Save** to save request as submitted. This will change the status from a draft request to a submitted request, populate a submitted date, and enter the request into the appropriate queue for assignment and processing.
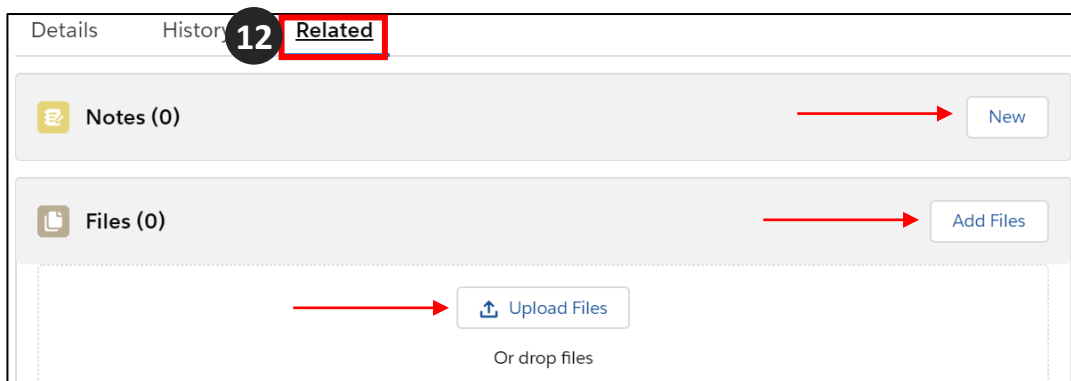
Note: If required fields have not been filled out, the user will receive a banner message stating that errors exist on the page. Fields requiring the user's attention will be listed under the banner and highlighted in red.

Note: If required, user can **Select Draft** in the drop-down menu under processing information section of the request and then **Click Save** to save the request as a draft without submission.

11. **Click** on the **Details tab** of the request to review the details of the request. (this is an optional step)
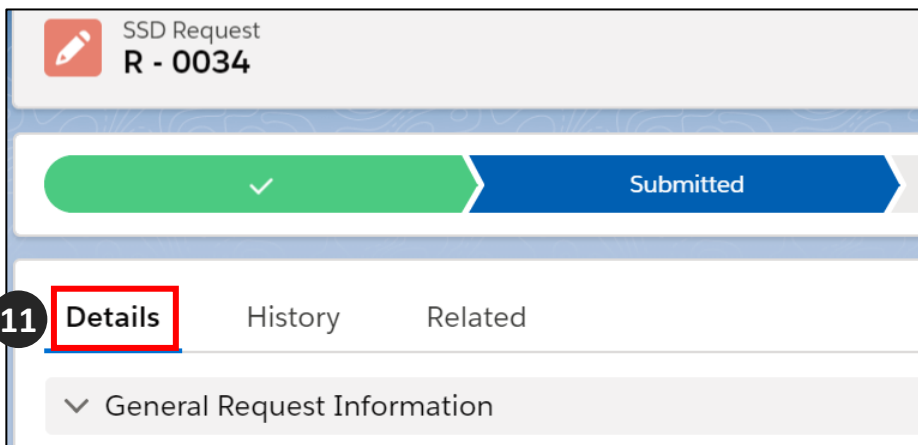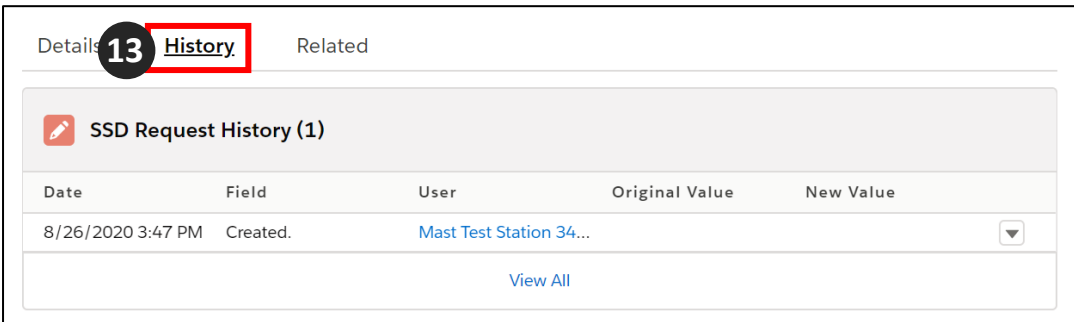

12. **Select** the **Related** tab to add documents and/or additional notes. (this is an optional step)
    a. **Select New** to add notes. Write required notes in the pop-up field.
    b. **Select Done** when finished entering in note text.
    c. **Select Upload Files** to upload any required files into the request.
    d. **Select Add Files** when finished uploading files into the request.

13. **Click** on the **History** tab to see all previous actions taken on the request. (this is an optional step)

Post-Step: There are 3 potential post steps:

(1)   Post Step 1: Requester can view currently submitted requests. *(Covered in View Request Status job aid)*

(2)   Post Step 2: Supervisors can review/assign requests to employees. *(Covered in View and Assign Pending Requests job aid).*

(3)   Post Step 3: Employees that are assigned the submitted request can process said requests. (*Covered in View, Manage and Complete all Assigned Requests*)

✓ You have completed creating a new request in MAST!

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