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Brazil Public Sector

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Public Sector Digital Services (PSDS)

Use the ServiceNow® Public Sector Digital Services (PSDS) application to deliver government services to constituents, businesses, and agencies on a single platform. Built on a government data model, Public Sector Digital Services provides prebuilt playbooks, solutions, configurable portals, and an AI-powered workspace that government agents can use to manage the full lifecycle of service requests—from intake to resolution. You can deploy Public Sector Digital Services with the applications that match your agency's needs. The applications are configurable and extensible using low-code tools to build workflows that are specific to your processes. Whether you're setting up for the first time or expanding an existing implementation, the content in this documentation set guides you through exploring the solution, configuring your environment, and using the product day to day.

Explore



Explore how Public Sector Digital Services can help you with its key features and benefits.

Configure



Customize your implementation of Public Sector Digital Services to meet your specific needs.

Integrate



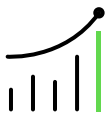
Extend capabilities in Public Sector Digital Services by integrating with other applications.

Use



Learn how agents and constituents can use Public Sector Digital Services to create, route, and manage public service requests.

Analyze



Access preconfigured dashboards with actionable data visualizations to track key metrics and improve your service.

Reference



Get additional details on Public Sector components such as lists, tables, forms, rules, components, parameters, roles, and personas.

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	Automate  Use ServiceNow Otto for PSDS to enhance user productivity and efficiency through proactive experiences using generative AI.	

Additional resources

- To learn more about what's new and what's changed, see the Public Sector Digital Services release notes.
- Get step-by-step guidance to help with your ServiceNow® implementations, upgrades, and more, see Best Practices.
- Work with an implementation specialist to streamline your setup process. To learn more, see ServiceNow Impact.
- Access real-time courses, self-paced training, and career resources at ServiceNow University.
- Visit Now Community to share knowledge and connect with others.

Exploring Public Sector Digital Services

Learn about Public Sector Digital Services (PSDS) features to help create a seamless support experience for constituents, businesses, internal agencies, and external agencies.

Public Sector Digital Services Overview

Public Sector Digital Services helps government agencies manage the complete lifecycle of constituent public service delivery. The solution is built on a government data model that standardizes how constituents, businesses, households, agencies, and service interactions are represented across your implementation. You can use this foundation as-is or extend it to create workflows that are specific to your agency's processes. Public Sector Digital Services includes a set of applications that support common government service types. Many are playbook-driven, guiding agents through each stage of a service request, from intake to decision. Others support different kinds of work—for example, the Investigative Case Management solution helps investigators process investigations and connect the records and evidence related to a case. Constituents and businesses access services through self-service portals, and agents manage their work from a configurable workspace. ServiceNow Otto for Public Sector Digital Services (PSDS) adds AI capabilities to help agents work through cases faster, including case summarization, chat summarization, and resolution notes generation. Public Sector Digital Services supports three primary service delivery scenarios: government to constituent, government to business, and government to agency. You can implement one or more of these scenarios depending on your agency's requirements.

Public Sector Digital Services Overview

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Public Sector Applications

Investigative Case Management  Handle investigative cases.	**Grants Management**  Handle applications for grants submitted by public sector users.	**Social Benefits Playbook**  Handle applications for social benefit programs.
License and Permit Playbook  Handle license and permit requests.	**Information Request Administration**  Handle public record and information requests.	**Service Request Playbook**  Handle non-emergency service requests.

Benefits

Provide a platform for citizens to engage

Serve the public outside of government's walls and hours of operations. Give your constituents the choice of connecting through email, phone, chat, social media, or mobile- anytime, anywhere, and from any device. Provide a streamlined platform for the public to request government services through assisted and self-service. Omni-channel advanced work assignment automatically assigns public service cases to the best-equipped agent based on capacity, skills, and case context.

Assign tasks across the enterprise

Guide government workers to fulfill public service requests quickly and consistently, and monitor the progress of other agents and teams. Create a single flow of work across governments and agencies so that cycle times are minimized and automation is maximized, end-to-end. Enable service delivery from one agency to another by connecting the public sector to other departments such as field service, finance, and legal. Collaborate with other agencies using the visual task board, workflow, and automation.

Enable insights with reporting and dashboards

Identify opportunities to improve case resolution, agent performance, and the service experience, and act on trends revealed in Performance Analytics for Public Sector Digital Services. Monitor current and prior performance to identify areas for improvement of products, services, and processes. Unlock insights to anticipate trends, prioritize, and drive actionable improvements, such as automating the most frequently recurring case resolutions.

Manage case volume with self-service

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Encourage constituents to help themselves with a self-service catalog, communities, knowledge base, and portal. Expand customer support by implementing Virtual Agent, a chatbot that runs on the Government Service Portal and in supported third-party messaging applications, such as Engagement Messenger. End users can request non-emergency services through a prebuilt, automated conversation that helps them submit a request.

Key features

Public Sector Digital Services offers key features that enable administrators and agents to provide the services and support requested by constituents and businesses.

Benefits of PSDS features

Benefits	Key Features	Role
Walk constituents through the process of submitting a grant proposal, applying for a license or permit, requesting government records and other public information, or submitting non-emergency service requests. Walk agents through the process of fulfilling these requests.	Playbooks	Constituent or Agent
Drive self-service from a portal that is integrated with knowledge articles, service catalogs, communities, and chatbots.	Portals	Constituent
Improve your agent efficiency for faster resolution and a better constituent experience.	Playbooks and Solutions	Agent or Manager
Manage case interactions and service level agreements (SLAs), product model relationships, and other services.	Case Management	Administrator
Increase productivity with automated case detail and comment summarization, so agents get answers fast. Also, learn how to route issues, recommend solutions, and identify trends.	Intelligence	Agent or Manager
Get at-a-glance visibility and a deep understanding of the data and identify areas that impact your processes.	Analytics and Insights	Manager
Embed a messenger-like pop-up inside any website	Virtual Agent	Administrator

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Benefits of PSDS features (continued)

Benefits	Key Features	Role
to interact with ServiceNow features, such as browsing knowledge, creating a case, and interacting with Virtual Agent. Manage how your customers use your web applications and services from one central location. Configure the behavior and styling of the messenger and deploy the configuration on the websites or mobile sites of your choice.		
A dedicated, customizable workspace for government agents and agents from external agencies to work on issues and deliver services for constituents, agencies, and businesses. Administrators tailor the configurable workspace for public sector use, enabling agents to resolve issues faster and view services received, recent cases, and profiles for businesses, agencies, and constituents. Agents can manage their cases, check on service requests, and even initiate requests for others.	CRM Workspace	Agent or Manager

Data management for Public Sector Digital Services

Data management refers to the processes and tools used to collect, organize, secure, and use constituent-related data effectively so that government service agent teams can deliver better service experiences. You can give your managers and agents a comprehensive view of constituent data, including constituent details, products and services, assets, service contracts, and entitlements.

Overview of data management

Data is the backbone of the Public Sector Digital Services application, connecting constituent, product, service, and team information, giving agents and managers a complete view of every interaction. From constituent profiles and services received to service contracts and entitlements, Public Sector works to bring citizen data together to enable fast resolutions and consistent service support.

The info-graphic illustrates the public service value chain, highlighting how agencies deliver benefits and services to constituents through different internal and external entities.

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At the core, a service agency can provide both physical and digital products and services. These offerings are delivered through one or more service organizations, each of them containing employees and staff working in user-facing or back-office roles.

Some service organizations operate with physical, tangible products (for example, fixing a pothole), while others rely on digital products and services (for example, issuing a license or permit). Regardless of format, everything within this chain exists to serve the constituents of the area.

Data Management acts as the foundation of this value chain, capturing and organizing constituent and business details, including accounts, contacts, consumers, and households, allowing service organizations to personalize interactions, communicate more effectively, and provide faster resolutions. Constituent and business profiles can be linked with products, services, entitlements, and cases, confirming that agents and managers have a 360-degree view of the issue at hand. Data Management links the government agency, its service organization(s), staff, and the constituents they serve through accurate information that powers each stage of service delivery.

Key elements of data management

The following key elements form the foundation of effective data management in Public Sector Digital Services:

Customer data

Customer data includes information about the constituents and users who are external to your organization, such as names and addresses, telephone numbers, and email addresses. Maintaining accurate customer data enables your agents to communicate with constituents quickly and easily.

- B2B: In the business-to-business (B2B) business model, customer data includes details about accounts and contacts.
- B2C: In the business-to-consumer (B2C) business model, it includes details about consumers and households.

To learn more about customer and constituent data, see Customer Data.

Product data

This data can include information about products and product models, service catalog items, sold products, install base items (the instance as configured for the user), and installed products. When assisting constituents, your service agents can quickly select the correct product data, add the details to case records, and view related details like knowledge articles and resolved cases.

To learn more about product data, see Product Data.

Service Model Foundation

Service Model Foundation refers to a set of pre-designed business and technical data frameworks that helps set up and manage how services are delivered and supported. It provides a standardized way to configure, monitor, and support service requests, applications, cases, and workflows across various business locations or government service organizations.

To learn more about the Service Model Foundation, see Service Model Foundation overview.

For more information on using the BLSP portal to add staff to your business location, create cases, work orders, and more, refer to the Using the BLSP.

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Internal user data

Internal user data includes the information about the people within your service organization, such as managers, agents, merit reviewers, and other employees. Internal users can be grouped into teams and assigned roles to manage cases, resolve issues, and interact with constituents and applicants.

Business stakeholders for Public Sector Digital Services

Business stakeholders are internal users who directly influence service processes. They can create, view, and approve cases and requests across your service organization.

To learn more about the business stakeholders, see Business Stakeholder for Public Sector Digital Services.

Playbooks and Solutions

Public Sector Digital Services provides agents across government agencies with a tailored workspace experience to work on cases created by constituents, businesses, and agencies.

Investigative Case Management

The Public Sector Investigative Case Management (ICM) solutions workspace provides a single location for investigators to organize assets related to an investigation. Investigators and supervisors can use ICM to initiate and manage investigative cases, view the full context of an investigation, and get relevant recommendations.

Grants Management

Use Grants Management for Public Sector Digital Services to set up and award grants, and screen proposals for them. The Grants Application Workflow in the Public Sector Digital Services (PSDS) Grants Management Playbook provides a structured process for managing grant applications from submission for the pre-award phase.

Playbooks

A playbook provides government service agents with step-by-step guidance through the life cycle of a government service case. Use Playbooks to fulfill requests for license and permits, government records and other public information, or non-emergency service requests, and to review applications for grants or the social benefits programs your agency offers. The workflows that are associated with a specific type of case and the activities that need to be completed to resolve cases of this type are detailed in the playbook. Playbooks also help your agents to visualize the entire life cycle of a workflow.

Four applications are available with Public Sector Digital Services that enable you to use playbooks:

- Social Benefits Playbook
- License and Permit Playbook
- Information Request Administration
- Service Request Playbook

To learn more about playbooks, see Playbooks for Public Sector Digital Services.

CSM Configurable Workspace

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Your government service agents have one stop for constituent interactions, the CRM Workspace for Public Sector Digital Services.

Multiple tabs enable agents to manage several cases at once. Agents and managers have ongoing visibility into the status of issues assigned to different agents across the agency. The workspace dynamically displays related contextual information based on the current state. Agents can also set compact mode and dark mode to optimize their experience and productivity.

Public Sector Digital Services playbooks are setup on and are accessed through the CRM Workspace to provide step-by-step guidance to agents for resolving specific types of government service cases, including service requests, information requests, license and permit, and social benefits cases.

To learn more about CSM Configurable Workspace, see Explore CSM Configurable Workspace.

Mobile Agent

Your government agents can use the Mobile Agent to create, update, and monitor non-emergency requests on a mobile device. You can also get an overview of your case load, including your new and active service request cases.

The Mobile Agent is currently only supported by the Service Request Playbook.

To learn more about the Mobile Agent application, see Mobile Agent experience for Public Sector Digital Services.

Advanced Work Assignment

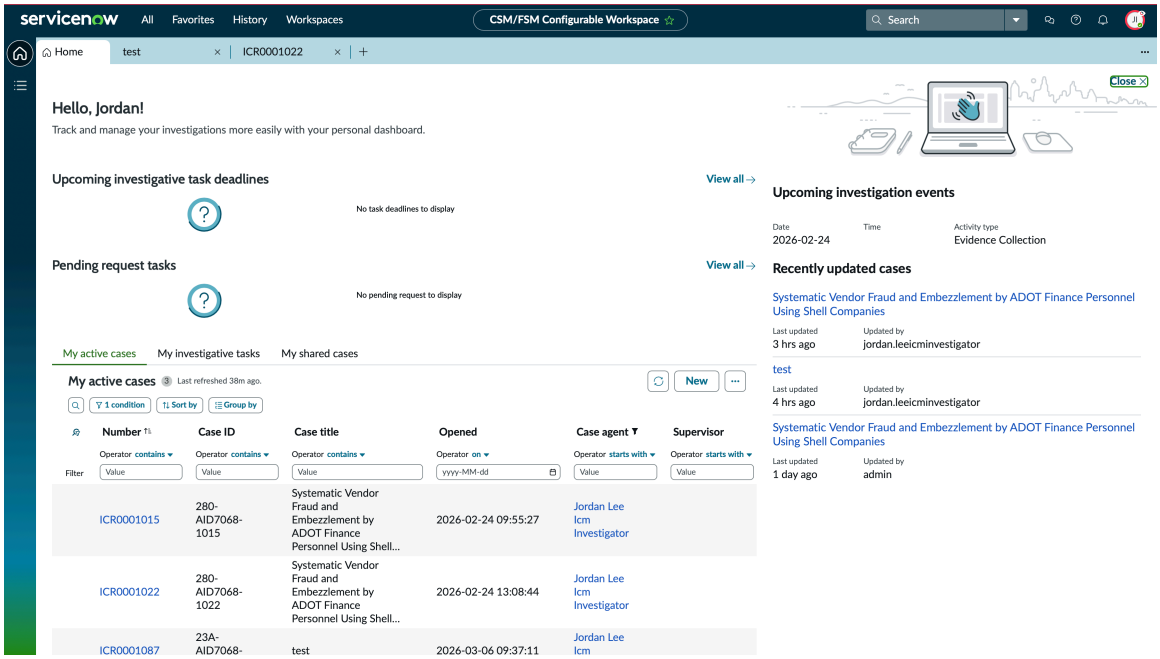
Use the Advanced Work Assignment (AWA) application to automatically route and assign public sector work items, such as non-emergency requests, to the best-equipped agents, based on their availability, capacity, and skills.

To learn more about Advanced Work Assignment, see Automatically route service requests using Advanced Work Assignment.

Exploring Investigative Case Management

The Public Sector Investigative Case Management (ICM) solutions workspace provides a single location for investigators to organize assets related to an investigation. Investigators and supervisors can use ICM to initiate and manage investigative cases, view the full context of an investigation, and get relevant recommendations.

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Investigative Case Management is a process solution for government investigative agencies to organize, track, and resolve investigations at all levels of government, across multiple case types. Whether the case involves fraud, organized crime, public safety incidents, or regulatory violations, investigative agencies can use ICM a structured way to manage leads, manage evidence, coordinate across roles, and see an investigation through. Investigative Case Management helps provide investigators with the structure they need to revisit facts, make connections across cases, and manage a web of people, organizations, vehicles, and physical evidence simultaneously. Agencies can use ICM for multiple investigation case types, such as:

- Fraud, waste, and abuse
- Corruption and misconduct
- Public safety investigations
- Regulatory and compliance violations
- Supply chain resource diversion
- Child Welfare

Designed for government investigative agencies at the federal, state, and local level, Investigative Case Management aims to provide a complex data ecosystem that allows centralized visibility across every case, entity, and piece of evidence on a single platform.

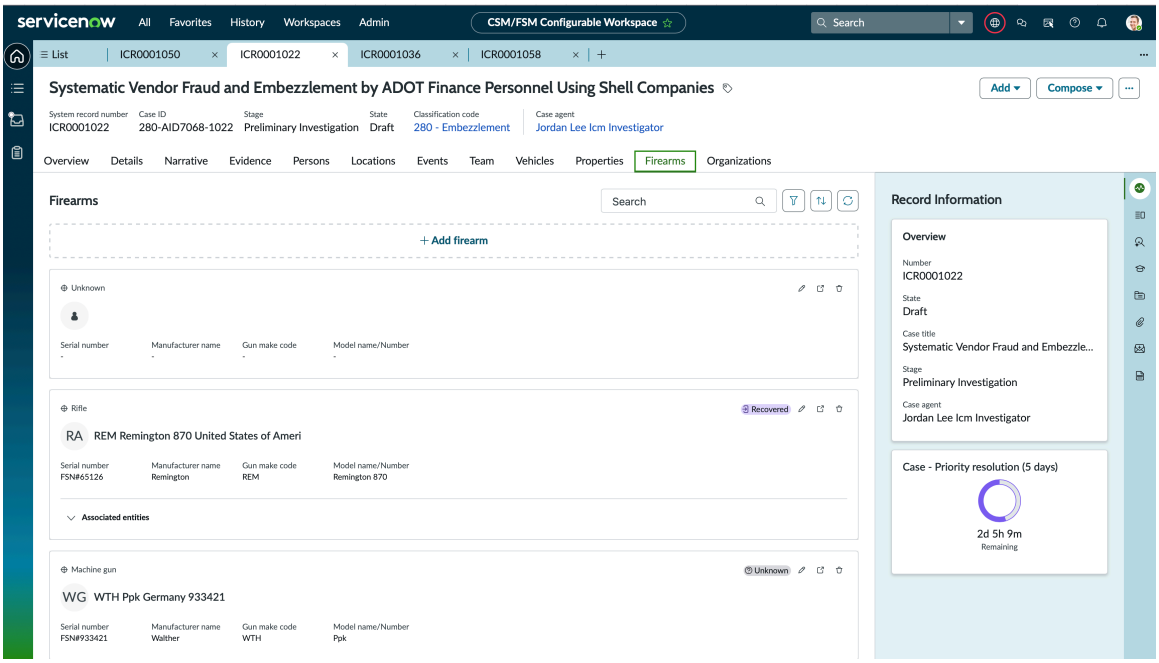
Key Features

Key features of Investigative Case Management include:

Entity Management

The Investigative Entity Management feature provides investigative agencies with a structured system that enables the creation and management of master indexes for persons, locations, organizations, vehicles, and property associated with an investigation, as well as a dedicated firearm master index. It enables creation and management of incident and investigation event timelines, role assignments, and entity linking within case workspaces.

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With Entity Management, investigators can:

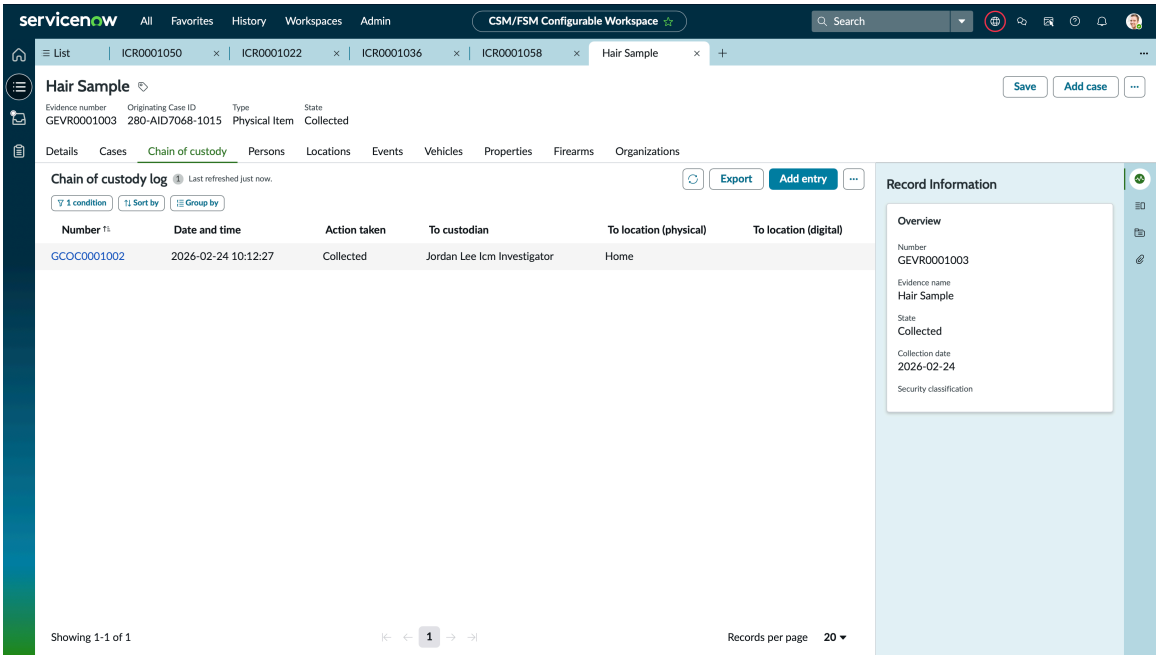
- Create common master indices for Persons, Locations, Organizations, Vehicles, Property associated with the case.
- Create and manage a centralized Firearms master index to unify firearm records across investigations, storing critical identifiers, traits, and historical data in a dedicated Firearms tab and allowing firearms to be linked to related entities (persons, events, cases, evidence, organizations, locations, property) within the case.
- Create incident and investigation event records to help capture the timeline for important events that happen during the investigation, and the timeline of the investigation itself.
- View audit logs for all firearm record changes and relationship updates.
- Associate multiple entities to each other and to the case, as well as manage all entities and their relationships to the case.
- Visualizes entities, evidence, tasks, and related cases as an interactive knowledge graph, surfacing hidden connections and blind spots with Case Link Analysis.
- Create a work order directly from an investigative task, so field dispatch happens inside the ICM workspace.

For more information on Entity Management, see Using Entity Management.

Evidence Management

The ICM Investigative Evidence Management feature users to upload or log evidence—such as documents, images, or physical items— and and map them to the relevant investigations, subjects, events, locations, vehicles, organizations, and properties, capturing key metadata like type, source, date received, notes, and optional custody tracking. With Evidence Management, investigators have a single, centralized interface for viewing and managing all evidence associated with a case, regardless of where it is physically stored, ensuring evidence can be consistently classified, accessed, and associated with relevant investigative records.

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With Entity Management, investigators can:

- Create evidence record objects to track and link evidence to investigations.
- Link to external evidence storage solutions via a configurable URL field.
- Introduce a digital chain of custody feature that tracks the movement, transfer, and status changes of evidence records with timestamps and responsible personnel for each action.
- Enable relationship mapping between pieces of evidence and all relevant case entities (People, Locations, Vehicles, Events, Property, and Organizations).

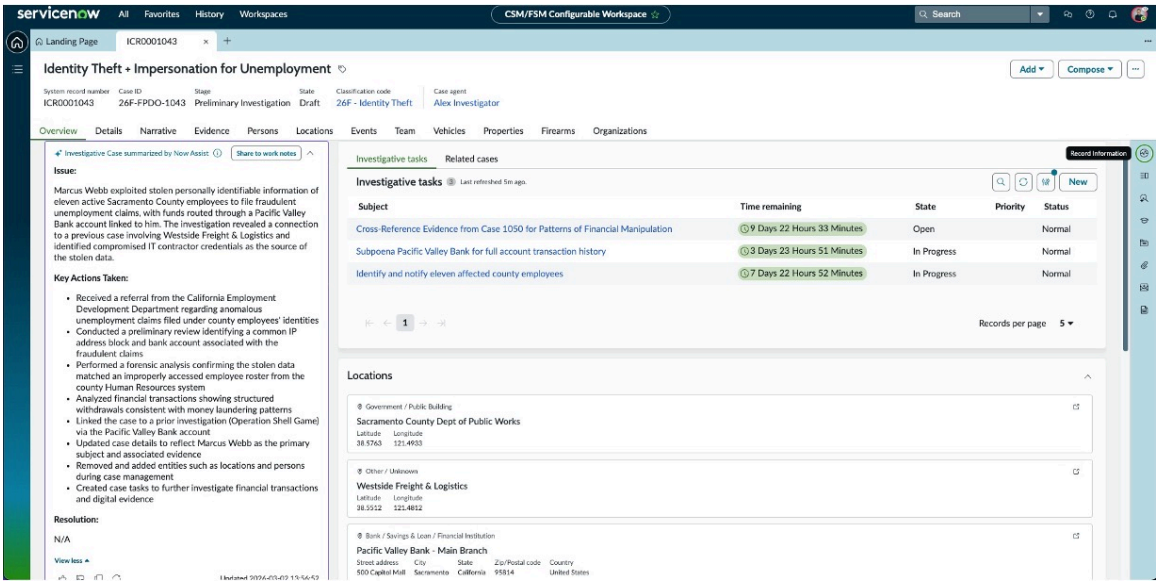
For more information on Evidence Management, see Using Evidence Management.

Master Index Versioning

Adds immutable, time-stamped entity snapshots and cross-case impact warnings so investigators can update shared entities without contaminating parallel cases. When an entity is linked to a case, the system locks an immutable, time-stamped snapshot of exactly what that entity looked like — defensible proof of "what we knew when" for prosecution and appeals. Before an update, investigators are told upfront how many active cases will be affected and can proceed globally or create a case-specific version. Every change is captured in a complete who/when/what audit trail, delivering OIG audit-readiness and chain-of-custody protection.

Case summarization and Narrative refinement gen-AI skills

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Synthesize case narratives, entities, evidence, and activity into a condensed, structured summary using the ServiceNow Otto for Public Sector Digital Services (PSDS) Investigative Case summarization skill, allowing agents to grasp case context, respond to inquiries, propose solutions, and integrate generated resolution information for investigative outcomes into the case record. This skill integrates into the ICM workspace, allowing agents to generate a summary directly from the case record page.

Refine the case narrative before supervisory review using the ICM Narrative refinement AI skill. This skill, accessible through the ServiceNow Otto for Public Sector Digital Services (PSDS) context menu directly on the case record page, integrates into the ICM workspace.

Key Personas

Key personas of Investigative Case Management include:

- the Investigator, who leads or participates in the investigation from initiation to resolution, and has a team of experts & leadership.
- a Witness, who wants to be able to report a potential crime to an investigative agency. An investigator can create a case from a witness complaint.
- an Attorney, who prepare cases for court and advises on legal compliance and case strategy. An investigator can create a case based on information received from an Attorney's office.

For more information on the personas and roles involved in Investigative Case Management, see Investigative Case Management Personas.

Exploring Urban Planning & Permitting Administration

The Public Sector Urban Planning & Permitting Administration solutions workspaceis a process solution platform for government land management, designed to modernize property administration, streamline permitting workflows, and enable evidence-based urban planning decisions.

Land management agencies can use Urban Planning & Permitting Administration as a structured way to manage complex property portfolios, zoning regulations, and permitting workflows with a government-optimized data model supporting cross-jurisdictional land administration. With a foundation of property-centric data models, planning workflows, and enterprise-grade

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architecture,Urban Planning & Permitting Administration helps provide agencies with the structure they need to transform fragmented land records and spreadsheet-driven permitting processes into a single source of truth for urban planning operations.

With Urban Planning & Permitting Administration, government agencies can:

- Unify property records across parcels, structures, units, and ownership/interest data for comprehensive land administration
- Accelerate permitting workflows and reduce administrative burden through streamlined applications and routing
- Enable evidence-based planning with integrated zoning, regulatory applicability, and land-use planning data
- Strengthen governance and compliance through ACLs, role-based access controls, and audit-grade lineage tracking
- Scale operations without proportional cost increases with a modular, extensible architecture supporting diverse regulatory environments
- Integrate seamlessly with License & Permit and other PSDS applications for end-to-end service delivery

Exploring Grants Management for Public Sector Digital Services

The Grants Management solution provides government agencies with a workflow for defining grant programs, screening applications, evaluating proposals, and communicating funding decisions. The solution runs entirely on the ServiceNow platform.

If you're a government agency, you can use Grants Management for Public Sector Digital Services to set up and award grants, apply for them, or both.

Grants are financial funding provided to individuals or organizations for a particular purpose, usually to fund initiatives that serve the public good. Grant-making agencies use Grants Management to create structured funding opportunities, collect and evaluate proposals from applicants, and manage award decisions and notifications — all from a single platform. Grant Program Managers stay in control of each stage, while applicants and external reviewers interact through dedicated portals.

Grants Management is a packaged application with playbooks and workflows built in to support an agency's grant portfolio at multiple levels, from portfolio-level funding programs through individual grant programs to case-level proposals and awards. Two core playbook-driven workflows power the solution:

- **Setup Playbook** — establishes a grant program for the first time. After a program is created, you can copy and edit it for a new grant period without starting from scratch.

- **Proposal Playbook** — supports the proposal management workflow handles the full application lifecycle for a published program, such as intake, screening and evaluation through final decision.

Grants Management uses funding programs and grant programs to separate portfolio#level funding governance from opportunity#level execution. Each construct serves a distinct role in the grant lifecycle and supports different users and decisions.

Grants Management 1.31 introduces rolling grant approvals. Grant program managers can propose and submit funding decisions for any scored subset of applications at any time. They do not need to wait for the entire proposal portfolio to complete merit review.

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Grants Management hierarchy

Grants Management organizes grant data in a three-level hierarchy. This hierarchy helps you plan how to structure your agency's grant portfolio.

Grants Management hierarchy

Entity	Description
Funding program	A portfolio-level construct that represents a line of business, policy initiative, or funding authority. Funding programs are long-lived, persist across fiscal years, and define the overall budget envelope and timeline. One or more grant programs are created under a funding program.
Grant program	An individual funding opportunity created under a funding program. Each grant program defines eligibility criteria, budget categories, milestones, review frameworks, and the application form presented to prospective applicants on the Grants Management Portal. Each grant program creates a product model record.
Proposal and award	Case-level records used to receive, evaluate, and manage individual grant applications. When an applicant applies to a published grant program, they submit a proposal. If approved, the proposal transitions through the award process.

Note: A grant program must be linked to a funding program before it can be published. The grant program's budget and timeline must fall within the funding program's budget and timeline.

What you can do with Grants Management

Grants Management supports the complete grant life cycle. Depending on your role, you can use Grants Management to:

- Create and manage funding programs that organize grant funding under a common portfolio, line of business, or policy initiative.
- Set up grant programs that define individual funding opportunities, including eligibility criteria, budgets, milestones, and merit review frameworks. Once a program is created, you can copy and edit it for a new grant period without starting from scratch.
- Publish grant program announcements to the Grants Management Portal so that prospective applicants can discover and apply for funding opportunities.
- Accept, screen, and evaluate grant proposals submitted by applicants through guided playbook workflows, including eligibility checks powered by the PaCE.
- Create and assign merit review tasks to internal review teams, and track scoring and ranking of proposals using configurable scoring frameworks.
- Build funding proposals that allocate budgets across selected applicants, and route award decisions to the grants program director for approval.
- Grant program managers can propose and submit funding decisions for any scored subset of applications at any time. They don't have to wait for the entire proposal portfolio to complete review. For more information, see Rolling grant approvals.

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- Generate results letters to notify applicants of award, rejection (ineligible), or rejection (decline) outcomes, with the merit review summary where applicable.
- Track applicant acknowledgment or decline of awarded grants.

Related information

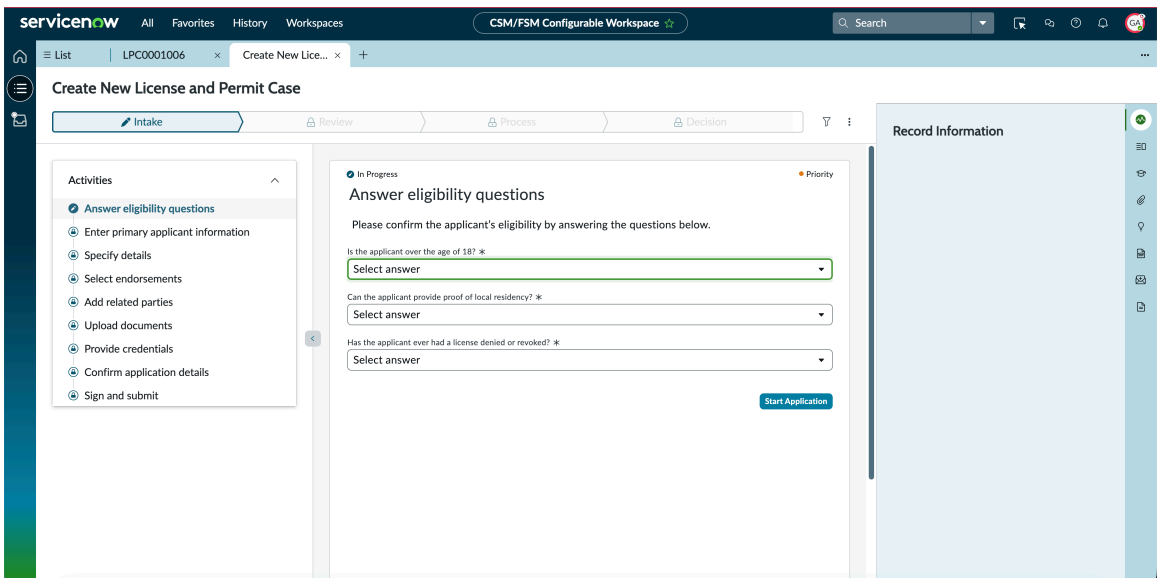
To get started with Grants Management, see the following topics:

- Install Grants Management for Public Sector Digital Services
- Create a funding program for Public Sector Digital Services
- Create a grant program for Public Sector Digital Services
- Using the Grants Management Portal
- Using the Reviewer Service Portal

Playbooks for Public Sector Digital Services

A playbook provides government service agents with step-by-step guidance through the life cycle of a public service request case. Use Playbooks to fulfill requests for licenses and permits, government records and other public information, or non-emergency service requests.

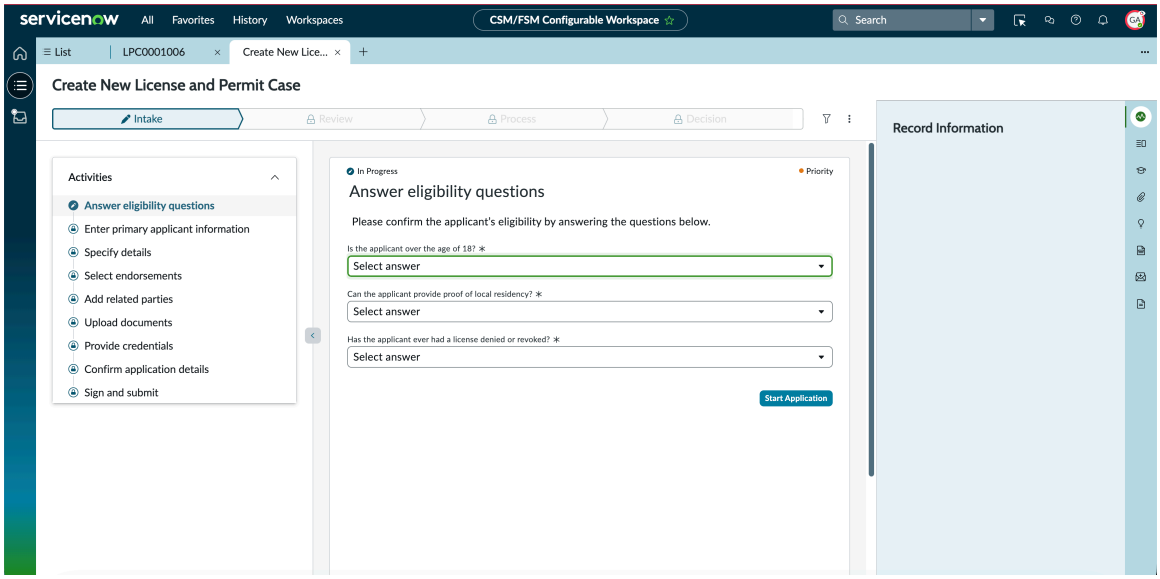
A playbook takes a workflow and breaks it into multiple stages or lanes. Each stage in a playbook includes one or more activities, or steps, for you to complete. Stages can also include automated activities, such as auto-sending an email to a customer when a stage or activity is complete.



By using a playbook, you can visualize the entire life cycle of the public service case workflow. With a playbook, you can:

- View the playbook stages and activities.
- Select an activity and perform the work to complete that activity.
- Mark an activity as complete and move to the next activity or stage.
- Complete the stages and activities to resolve the case.

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The following applications are available with Public Sector Digital Services that enable you to create and use playbooks:

Social Benefits Playbook

Provides an end-to-end workflow for handling applications for social benefit programs submitted by public sector end users.

License and Permit Playbook

Provides an end-to-end workflow for handling license and permit requests submitted by public sector end users.

Information Request Administration

Provides an end-to-end workflow for handling public record and information requests submitted by public sector end users.

Service Request Playbook

Provides an end-to-end workflow for handling non-emergency service requests submitted by public sector end users.

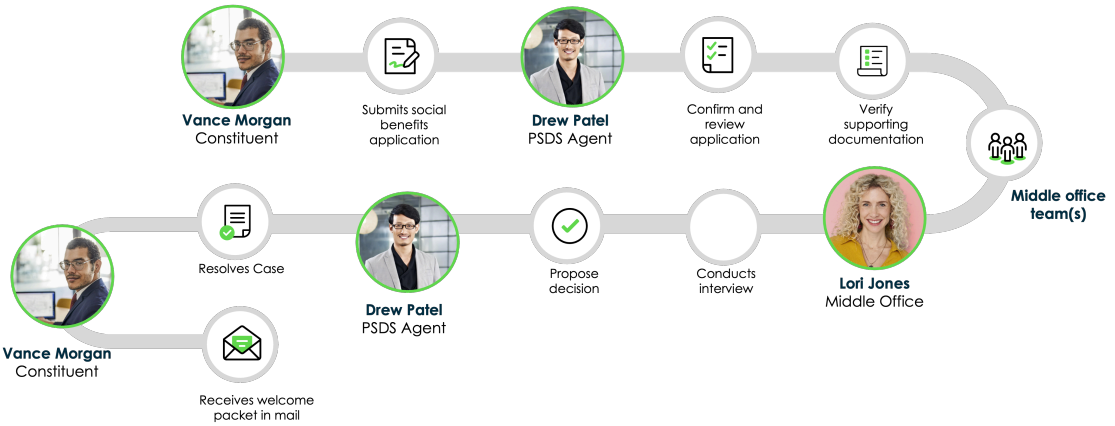
The corresponding playbook for each case type automatically appears in the **Playbook** tab when an agent creates a public service request case in the CRM Workspace, or when a constituent puts in a request through the Government Service Portal.

To learn more about playbooks, see Using Playbooks Public Sector Digital Services.

Exploring the Social Benefits Playbook

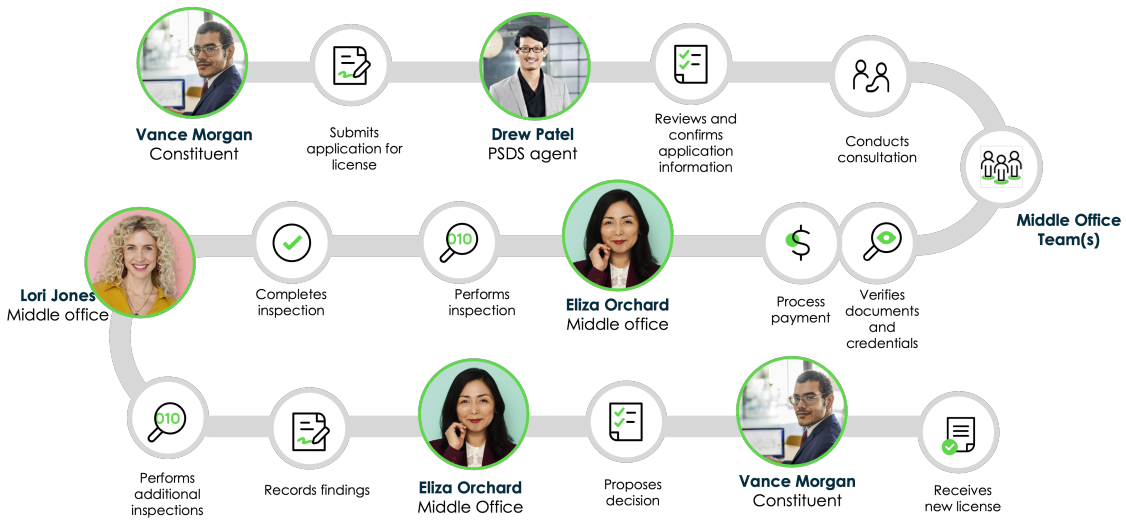
The Social Benefits Playbook provides an end-to-end workflow for handling applications for social benefit programs offered by your government agency and submitted by public sector end users.

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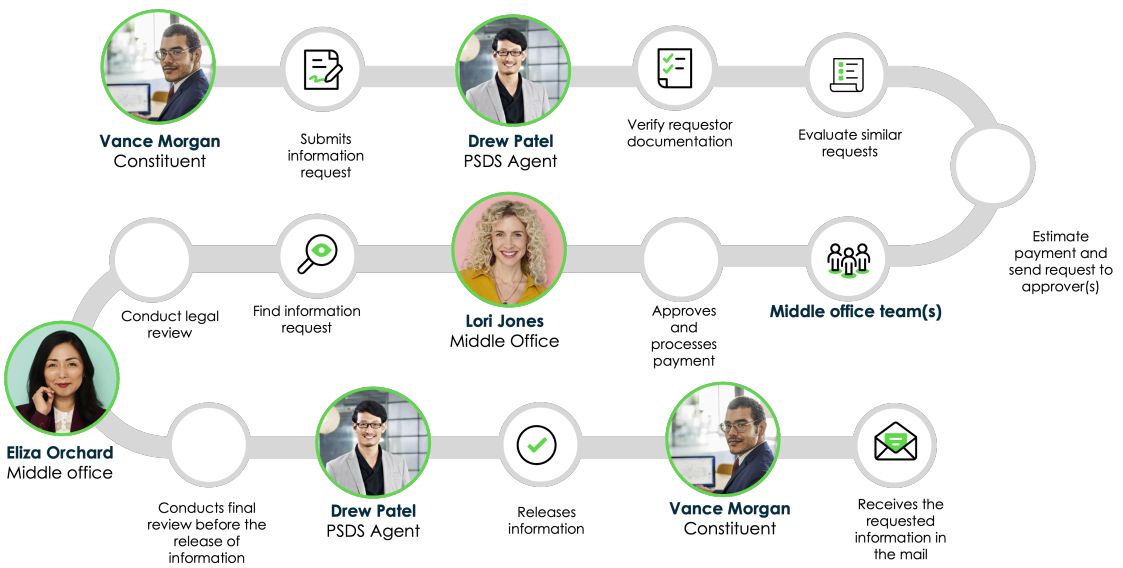
Exploring the License and Permit Playbook

The License and Permit Playbook provides an end-to-end workflow for handling requests for the license and permit that your agency offers, submitted by public sector end users.



Exploring the Information Request Administration

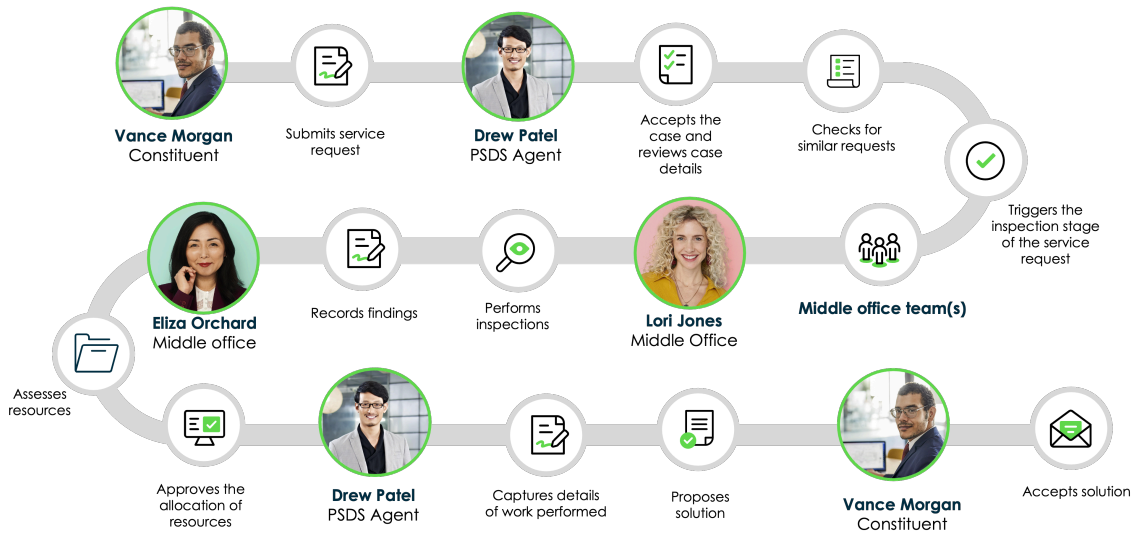
The Information Request Administration provides an end-to-end workflow for handling public record and information requests submitted by public sector end users under the Freedom of Information Act (FOIA).



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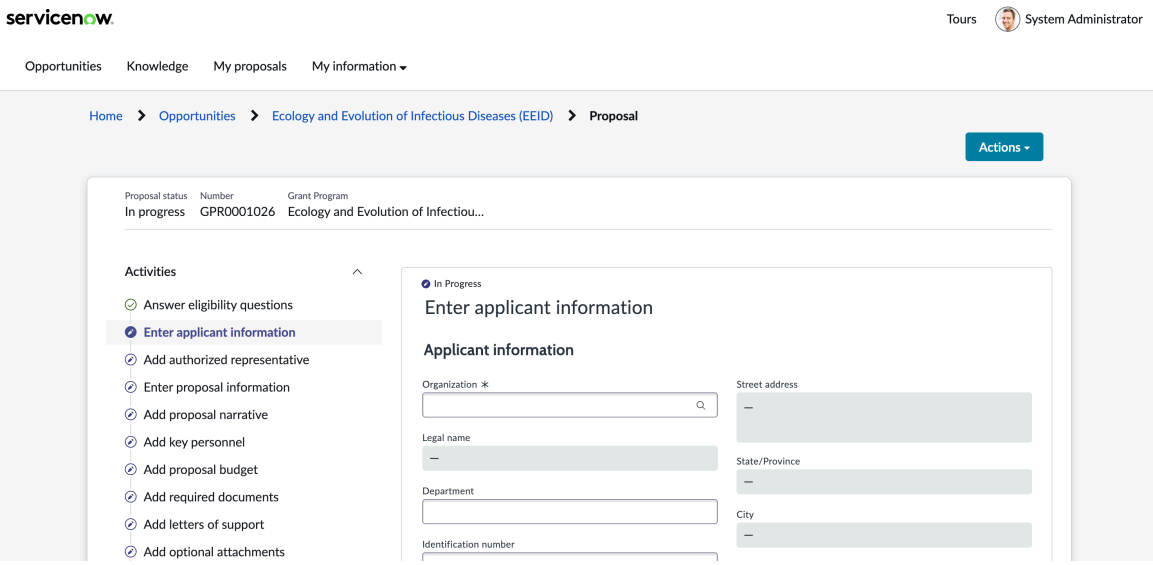
Exploring the Service Request Playbook

The Service Request Playbook provides an end-to-end workflow for handling non-emergency service requests submitted by public sector end users.



Self-service Portals for Public Sector Digital Services

A portal provides an end user, in this case a constituent or applicant, with step-by-step guidance through submitting a public service request case. Use Portals to submit requests for licenses and permits, government records and public information, non-emergency services, or to submit applications for social benefits or grants opportunities.



With the Public Sector Digital Services application, you can provide service for your constituents through web applications that hosts self-service capabilities like knowledge articles, community forums, service catalogs, case management, and chat.

Self-service in Public Sector offers the following benefits:

Reduces agent workload

Self-service enables constituents to resolve common issues on their own using knowledge articles, guided help, and virtual agents. This reduces the volume of incoming cases and enables support agents to focus on more complex, high-value interactions.

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Seamless access to self-service support channels

Constituents can access support anytime through an intuitive portal, virtual agent, or knowledge base. Immediate access to information and automated assistance leads to faster resolution times and a more seamless support experience.

Provides consistent and accurate answers

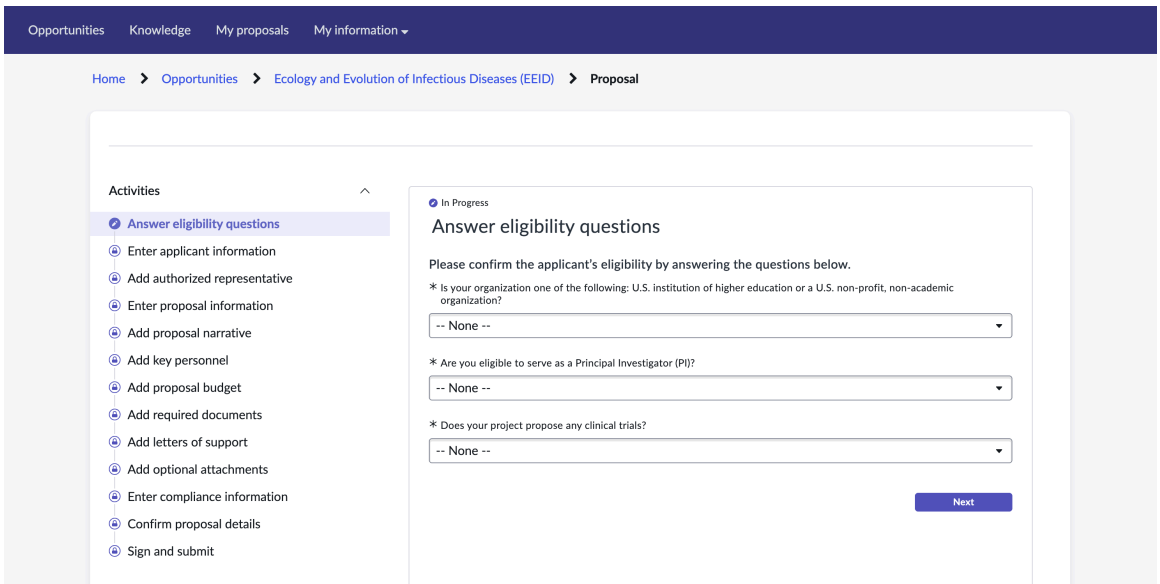
Centralized knowledge management ensures that all constituents receive standardized and verified information. Knowledge articles and automated workflows deliver accurate, up-to-date solutions, minimizing confusion and repetitive requests.

Playbooks for Portals

Whether you're a government service agent or a constituent using the Government Service Portal or Grants Management Portal, you can use Public Sector Digital Services playbooks on service portals to complete the tasks and activities needed to resolve your requests. Playbooks on service portals (for constituents using the Government Service Portal or Grants Management Portal) integrates seamlessly into Playbooks for government service agents using the CRM Workspace, giving both parties the step-by-step guidance for the case flow process and the contextual information that you need to successfully complete each stage of the flow and its associated activities.

Guided intake with playbooks on service portals makes it effortless to fill out a form or provide information for a case. Playbooks offer a clear roadmap that indicates your progress in the submission process and the remaining steps that you need to complete. If needed, you can navigate back to a previous step, or use intuitive options and input controls that enable you to input information in a detailed manner. Additionally, you can save an application or intake form that is not yet ready for submission and resume work on it later.

This example shows the Playbooks on portal experience for applicants using the Grants Proposal Intake Playbook on the Grants Management Portal.



With Playbooks for Portals, you get a guided interface where you can take prompt actions on the pending tasks and activities that are related to your cases. You get the following key benefits using Playbooks for Portals:

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- Enhanced experience. Follow the step-by-step process that has features, such as save and resume, where you can initiate work on a case and then resume it later.
- Decreased case resolution time. Track and complete the requested tasks promptly and accurately. You can get a faster case resolution with Playbooks for Portals.
- Increased visibility. Get visibility into the status of the case and get insights into the expected resolution time.

These playbooks are designed to guide you through the steps of the intake process. Within the playbooks, you can locate the tasks that are assigned to the case, view all ongoing activities with the associated actions, and do the actions on the assigned tasks. The activity stream for the case playbook enables you to track your progress. If it's available, you can also see the related information about the case.

The playbook includes multiple activities. You can see the activity stream against the case playbook, the task on the playbook, and the related information for the case as available. When using a playbook, you can do the following actions:

- View the activities outlined in the playbook.
- Select an activity and carry out the required tasks to complete it.
- See the status indicators that display the current state of each activity or step.
- See the check boxes and counters that indicate where you are in the workflow.
- Mark an activity as complete and proceed to the next activity or stage.
- Continue completing the stages and activities necessary to submit the case.

The following playbooks on service portal experiences are available for constituent use:

- Grants Management: Grants Proposal Playbook, Grants Workspace Playbook
- Service Request Playbook
- Information Request Administration

Engagement Messenger

With the Engagement Messenger web application, constituents can access the information or services they need from your third-party web applications, even if they’re located outside of the ServiceNow environment.

To learn more about Engagement Messenger, see Configure Engagement Messenger for Playbooks.

Service catalog

With the Service Catalog capability, you can create service catalogs where constituents can request items, such as service offerings. You can enable constituents to request items from the portal by associating one or more service catalogs with the portal. Constituents can also track the status of open requests from the portal.

To learn more about Service catalog, see.

Knowledge base

With the Knowledge Management capability, you can create knowledge bases with articles to share information with users on the portal. Constituents can search the knowledge bases for information, such as troubleshooting or task resolutions, to resolve issues and answer questions.

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To learn more about searching the Knowledge base, see .

Chat

With the Virtual Agent platform capability, you can design and build automated conversations that help your constituents get the help that they need.

As constituents answer questions and select options presented by Virtual Agent, they're directed to a self-service resource.

If constituents want to chat with an agent, Virtual Agent hands them off to a live agent. To provide this resource, use the Connect Support feature.

To learn more about chat, see Configure chat channel .

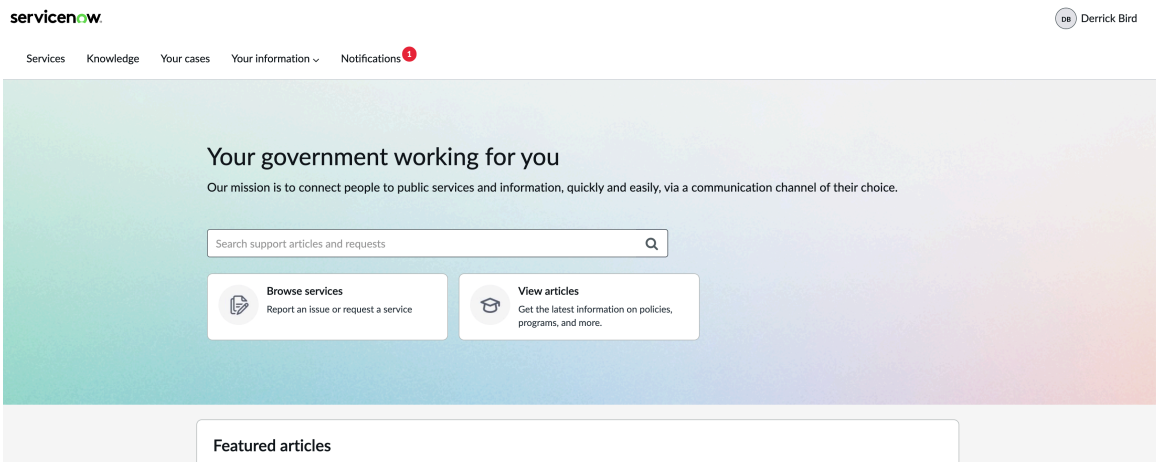
Government Service Portal

By using the Government Service Portal, constituents and businesses can report issues, access and view the status of existing service requests, request public records, search for information about a question or issue, view and update their contact information, and request assistance from a government service agent— all in a user-friendly, customizable interface.

Government Service Portal for constituents

The Government Service Portal experience begins on the portal home page for constituents. Agencies usually customize their home pages to be viewed by logged-in users and users who aren't logged in. For example, a logged-in user might see different information on the home page than a user who isn't logged in.

This example shows the default home page for a registered user of the Public Sector Digital Services Government Service Portal.



Note: Administrators can customize Government Service Portal home pages in Service Portal, so home page appearance might differ across government agencies.

Constituents can do the following tasks in the Government Service Portal:

- Register as a new user, create a login, and create a user profile.
- Browse and request services or information, track cases, view received services, and report issues.
- Search for information, browse knowledge articles, and engage with the community.
- Get the latest information on policies and programs by searching and viewing articles.

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- Discuss issues with neighbors and share perspectives by asking the community.
- View your recent services and see the popular services on the site.
- Get help using Virtual Agent.
- Request services such as street repair, trash removal, building inspections, and other public maintenance.
- Request information and public records from local, state, and federal public agencies.

For more information on the services that are offered in the Government Service portal service catalog, see Government Service Portal service catalog.

Government Service Portal for businesses and business entities

The Government Service Portal enables businesses to access their cases and service information as well as report issues. Business or business contacts can use the Government Service Portal to view their submitted cases, and raise requests by using the service request catalog.

Business contacts have the same functionality as a constituent user, with a few additional permissions. In addition to the constituent user tasks, business contacts can do the following tasks in the Government Service Portal:

- Register a new business.
- Request services that are related to licenses, social benefit programs, permits, information, and service requests.
- Request services that are related to grants, social benefit programs, licenses, permits, information, and public services.
- View the services that they received.
- View information records that they requested.
- View all license or permit requests.
- View items that they received.
- View their existing cases.
- View business and child business profiles.
- View business contact information such as names, addresses, and other contact information.
- View publications, such as government pamphlets and newsletters about services.
- View notifications such as government notifications and new contact approvals.

For information on how to customize the Government Service Portal, see Customize the Government Service Portal. For information on how to customize the Government Service Portal using Guided Setup, see Configure Public Sector Digital Services Core foundational data using guided setup.

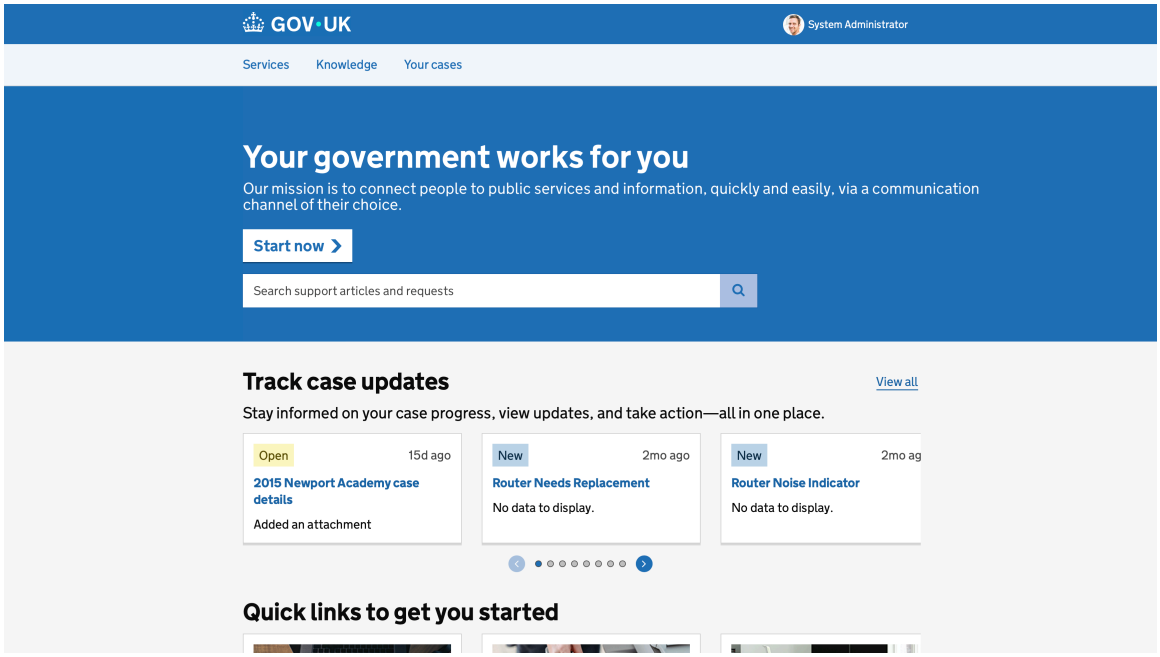
GOV.UK Design System Service Portal

Use the GOV.UK Developer Toolkit, a library of reusable portal widgets that follow GOV.UK Design System guidelines, to build service portals that deliver citizen-centered digital services to UK government constituents.

The GOV.UK Developer Toolkit is a collection of pre-built, GDS-compliant portal widgets that developers and partners can use to build service portals for UK government agencies. Developers can use these standardized components, widgets, and pages (homepage, FAQs,

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registration, profile, login, case detail, knowledge search, record producers) to assemble portals that meet UK accessibility and design standards. By default, this toolkit provides a pre-built portal, the GOV.UK Design System Service Portal (/ukgds), that adheres to GOV.UK Design System guidelines and patterns.



On the GOV.UK Design System Service Portal, UK constituents can access services such as permit applications, license renewals, public records requests, and more.

UK constituents can do the following self-service tasks in the GDS Service Portal:

- Register as a new user, create a login, and create a user profile.
- Browse and request services or information, track cases, view received services, and report issues.
- Search for information, browse knowledge articles, and engage with the community.
- Get the latest information on policies and programs by searching and viewing articles.
- Discuss issues with neighbors and share perspectives by asking the community.
- View your recent services and see the popular services on the site.
- Get help using Virtual Agent.
- Request services such as street repair, trash removal, building inspections, and other public maintenance.
- Request information and public records from local, state, and federal public agencies.
- GOV.UK One Login Integration for Public Sector Digital Services

For more information on how to set up and configure the pages and widgets offered by the GOV.UK Developer Toolkit, see Configure the GOV.UK Design System (GDS) Service Portal.

Reviewer Service Portal

Enable merit reviewers to track, score, and monitor grant proposals via a dedicated Reviewer Service portal.

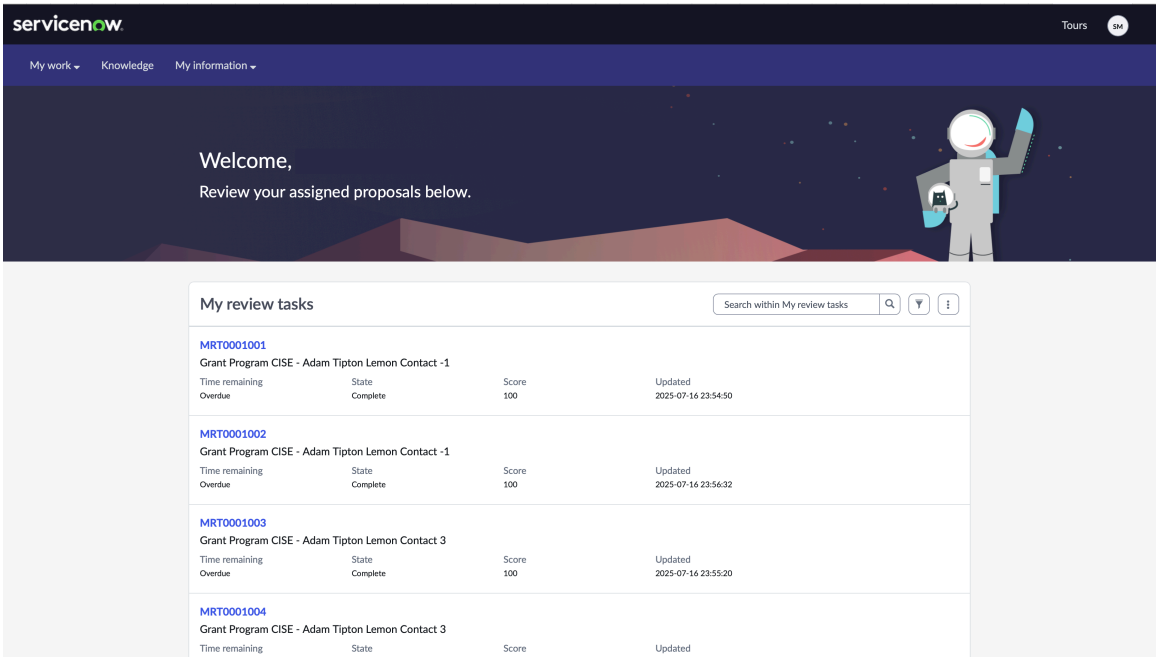
In the Reviewer Service Portal, External Reviewers can access assigned Merit Review Tasks (MRTs) and related proposals, score each MRT based on several attributes with a 5 point

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scale, and, if necessary, decline specific MRTs by providing a valid reason such as a conflict of interest or other concerns. The score is auto-calculated based on the scoring rubric's attributes. Requests for new merit reviews tasks appear as a notification in the Reviewer Service Portal.

The Reviewer Service Portal experience begins on the portal homepage, where merit reviewers can view the merit review tasks that are assigned to the case, view all ongoing merit review activities with the associated actions, and perform actions on the pending and assigned tasks.

This example shows the default home page for a merit reviewer using the Public Sector Digital Services Reviewer Service Portal.



Merit reviewers can do the following tasks in the Reviewer Service Portal:

- View and manage a list of review tasks for grant proposals.
- View grant programs or proposals that they are participating in.
- View high-level information from the record page of the grant program by selecting the grant program number.
- View details of the listed review tasks such as time remaining, status, score, and flags.
- View or reference the scoring rubric by selecting the KB article.
- View the grant program announcement page.
- Review proposals and assign scores based on their assessment or flag any reviews.
- Provide comments for rationale, strengths, or concerns about their evaluation of the proposal.
- Submit or decline a review along with justifications.

For more information on how to use the Reviewer Service Portal, see Using the Reviewer Service Portal in Public Sector Digital Services.

Grants Management Portal

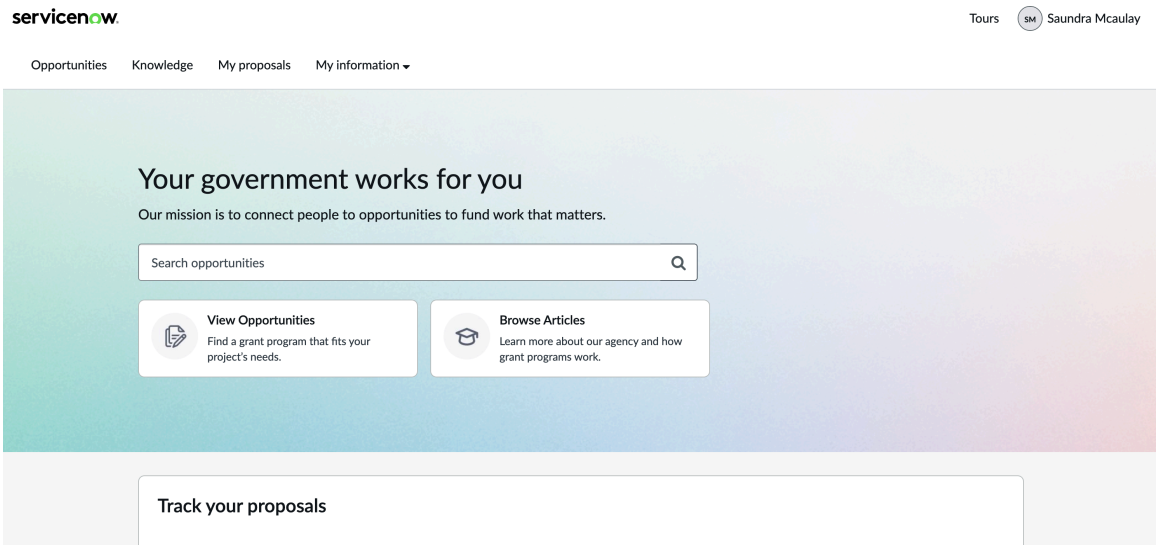
Constituents and business contacts can find, apply for, and track the status of their grant applications using the Grants Management Portal.

The Grants Management Portal experience begins on the portal homepage for constituents. Agencies usually customize their homepages to be viewed by logged-in users and users who

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aren't logged in. For example, a logged-in user might see different information on the home page than a user who isn't logged in.

This example shows the default home page for a registered user of the Public Sector Digital Services Grants Management Portal.



Note: Administrators can customize Grants Management Portal homepages in Service Portal, so homepage appearance might differ across government agencies.

From the landing page, a constituent can:

- Search for grant opportunities.
- View information regarding each grant program, such as a synopsis, eligibility summary, description, program contacts, resources, milestones, award and budget information, and other related information.
- Submit proposals for grant opportunities and monitor the status of their existing proposals.
- Review and download the results letter and merit review summary of their submitted grant proposals, and accept or decline their award within the Results tab.
- View all Knowledge Base articles related to grants.

For more information on how to use the Grants Portal, see Using the Grants Management Portal in Public Sector Digital Services.

Case management for Public Sector Digital Services

Manage constituent requests, applications, and issues by creating cases, routing cases to agents and groups, and working toward resolution. With case management, you can provide your government service agents with the tools they need to evaluate cases, communicate with constituents, answer questions, and resolve issues.

Getting to know the case management process

Case management refers to the processes and activities designed to evaluate and address constituent issues, requests, and applications while managing effective communication. Case management enables you as a government service agency to engage with constituents, categorize and route cases, assign work to government service agents, and manage cases through resolution and reporting. Case management starts with case creation from an

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interaction, as constituents reach out through a number of communication channels including email, phone, chat, and the Government Service Portal.

The following diagram shows the case management process.

Use the following features with the Public Sector Digital Services application to manage the cases for your constituents:

- Case workflows
- Case types
- Service definitions
- Playbooks

Case workflows

A case workflow is a series of steps and tasks that are involved in closing a case. By using a case workflow, you can automate systems to simplify your processes, track task completion, and accelerate case resolution..

To learn more about case workflows, see Life cycle of a Public Service case.

Case types

A case type is a collection of data and processes that are needed to resolve a specific type of issue. For example, case types are needed when a government agency has different processes for supporting constituents across multiple departments, agency locations, or service types. By using a case type, you can separate these processes through case applications that support each process.

To learn more about case types, see Government Service Case Types.

Service definitions

A service definition refers to a specific type of service request that your agents can offer to constituents for a case type. Service definitions establish a connection between the products, services, and case types so agents and constituents can quickly access the relevant case types.

To learn more about the service definitions, see Service Definitions.

Playbooks

Playbooks provide agents with a visual guide, including step-by-step guidance for the various tasks that the agents can use to resolve the specific type of service case. A playbook helps to improve agent productivity and the constituent experience by digitizing and automating complex agency service processes.

To learn more about playbooks, see Playbooks for Public Sector Digital Services.

Service Exchange

Service Bridge for Public Sector Digital Services (PSDS) allows agencies to connect multiple ServiceNow instances to provide support and service experiences across the Public Sector ecosystem, enabling coordination between multiple government service agencies and their constituents.

To learn more about Service Bridge for PSDS, see Service Exchange for Public Sector Digital Services.

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Service Exchange for Public Sector Digital Services

Connect multiple ServiceNow instances to provide support and service experiences across the Public Sector ecosystem, enabling coordination between multiple government service agencies and their constituents using Service Bridge for Public Sector Digital Services (PSDS).

Enable agency to agency communication and coordination across multiple ServiceNow instances using Service Bridge for Public Sector Digital Services (PSDS). Agencies can coordinate across the ServiceNow® Public Sector Digital Services ecosystem, facilitating cross-agency case management, real-time coordination with dynamic task management, secure inter-agency data sharing, and streamlined approval workflows for license and permits, social benefits, and grants funding distribution.

Whether you are a government agency provider communicating with other agencies, or an agency connecting with their constituents, learn how you can establish an integration between multiple types of instances with Service Exchange. This integration allows agency providers to receive and fulfill service requests in their own instances, share data, route tasks in real-time, and more. Learn how you can use Service Exchange for inter-agency data sharing, constituent support, and service catalog management.

- Enterprise users can collaborate with service providers and partners through bi-directional workflows.
- Service Exchange enables streamlined onboarding, and provides a remote service catalog that can be updated in real-time.

A provider instance belongs to the government agency who provides Service Bridge to other agencies and partners. As a government agency provider, you can:

- Author, publish, and update remote service catalogs from your instance for your constituents, business contacts, channels, or agency partners to generate service requests on their instances that can be fulfilled in your instance.
- Integrate your instance and tasks with the other instances in your Public Sector ecosystem.
- Send cases to your constituent's ServiceNow instance via Provider Task
- Receive and fulfill service requests on your instance pushed remotely from your constituents', business partners', channels', or agency partners' ServiceNow® instance(s).
- Access data synced in real-time between the provider instance and the consumer instance to track updates to government case records

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Agencies can connect:

- Within the agency across multiple departments
- With businesses or constituents
- With suppliers
- With implementation partners
- With other agencies

A consumer instance

Service Exchange for Public Sector Digital Services Key Features

Remote Catalog	Keeps the development of shared catalogs between agencies with the workflows & integrations in the providers instances while providing constituents with native catalog items in their instances.	Other agencies can avoid creating their own catalogs, and can utilize the original agency's remote catalog, leads to reduced costs and decreasing errors as well as increasing customer experience. Additionally increasing the efficiency and productivity at original agency as well as at consumer.

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Service Exchange for Public Sector Digital Services Key Features (continued)

Remote Choice	Provides direct access to provider data in real time during the submission of a Remote Catalog item.	Removes the need to replicate foundation data into the consumer instance. Having the right information at the right time reduces the chances of errors and reduces costs.
Remote Task	A sustainable replacement for custom eBonding. Collaborate effortlessly across the ServiceNow ecosystem. Native alternative to traditional E-Bonding. Enables task to task integration.	Avoids the need to build error-prone integrations. Enhances collaboration and communication, while enhancing service quality.
Proactive Case	A case initiates an agency Provider Task through a flow on the agency provider's instance that can be checked proactively on the consumer instance. There is a Proactive Case flow behind to sync.	Simplifies and increases automation ratio for alerting processes or notification processes. Improves the service delivery quality and streamlines tasks assignments.
Scratchpad	Scratchpad allows variables to be shared “ad hoc” between instances through Remote Tasks or Provider Tasks.	Simplifies data sync between agency and consumer instances and reduces adoption efforts. Quick data entry and retrieval, leading to reduced time spend by capturing data and updating directly in scratchpad.
Authorized User	Enables user level role based access control of Remote Record Producers in the constituent instance.	Avoids mismatch possibilities due to adoption of user level role based access control. Reduces compliance risks by reducing access errors through data mismatch.
Provider Task (record producer)	Enables agency providers to be transparent and collaborative with their consumers that use ServiceNow by syncing relevant tasks, like cases, to their constituents as Provider tasks.	Simplifies data sync between the instances and avoids data mismatches between the cases in the different instances
Configuration Revisions	The configurations of remote record producers, remote task definitions, and foundation data sync offerings can be updated to create new revisions that can be entitled to constituents. New revisions	New revisions of Service Bridge entitlements that offer updated functionality can be developed and deployed to compatible consumers without negatively impacting consumers who have not yet

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Service Exchange for Public Sector Digital Services Key Features (continued)

	of entitlements with updated functionality can be deployed to compatible consumers without impacting consumers who have not upgraded their Service Bridge applications.	updated their application. The agency provider delivers an improved customer experience with improved efficiency and scalability.
Mismatch Version Support	Providers and consumers can run different versions of the Service Bridge applications (within N-2) without impacting their ability to exchange data.	This feature eliminates the need for agency providers to coordinate Service Bridge applications updates with their consumers and allows providers to adopt new features while supporting consumers who have yet to upgrade. Service Bridge supportability and scalability are improved, and the agency provider is able to deliver an improved customer experience.
Consumer Pre-Flows	Constituents in the consumer instance can control if Remote Catalog Item request data should be synced to the provider. A flow can be associated with a Service Bridge Remote Record Producer (RRP) and run consumer-defined processes, such as approvals, before the request/task is synchronized to their provider.	Consumer Pre-Flows will enable Service Bridge providers to improve their service for current consumers and expand to additional customers for whom this feature is a requirement.
Consumer Variable Sets	A Service Bridge consumer administrator can now add additional variables to a Remote Catalog Item/RRP that they can use in managing the request content and flow.	Allowing this additional consumer control of Service Bridge RRP requests will enhance Service Bridge usability, elevate the customer experience, and drive higher adoption rates.
Remote Catalog Item Client Scripts	A provider will be able to include catalog client scripts that will be synchronized to the consumer's instance with a Remote Catalog item. The consumer administrator will review and approve each script when activating the catalog item in their instance.	Allow providers to control the completeness and correctness of catalog requests from the consumer, enabling more efficient service and improved consumer satisfaction; and will lead to increased adoption of Service Bridge.

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Key capabilities

The main capabilities of Service Exchange include:

- Onboarding: Quickly onboard agency partners or constituents that use ServiceNow with a simplified registration process.
- Authorized Users: Manage and control access at the Remote Catalog item level to meet security and compliance requirements.
- Remote Catalog: Update shared agency service catalogs in minutes as new items are introduced.
- Remote Choice: Ensure up-to-date field options in downstream agency remote catalogs by retrieving real-time data from the provider's ServiceNow instance.
- Remote Task: Help increase automation with seamless multi-party and multi-instance workflows across the ServiceNow ecosystem.
- Provider Tasks: Enable all providers of services using Service Exchange to be transparent and collaborative with their partner agencies who use ServiceNow by syncing relevant tasks like cases, to consumers as Provider Tasks.
- Transform Framework: Transform inbound and outbound remote task data for easy process transformation between ServiceNow instances.

Policy as Code Engine (PaCE) and the Social Benefits Playbook in Public Sector Digital Services

As a Public Sector Digital Services process owner or admin, you can create and maintain the rules that drive how eligibility and benefits are determined in the Social Benefits Playbook using Policy as Code Engine (PaCE. PaCE is a powerful, low-code rules engine capable of processing rules in seconds. The rule-sets created within this rules engine are called policies.

You can administrate the full life cycle of policies using PaCE in applications by searching, reviewing, and updating existing policies, and creating policies as required. Policies in the applications are powered by PaCE. For more information on PaCE and how it fits in with the Social Benefits Playbook, see Understanding Policy as Code Engine (PaCE) and the Social Benefits Playbook.

Exploring Analytics and insights for Public Sector Digital Services

Use the Performance Analytics applications for Public Sector Digital Services to report your constituent service performance and effectiveness. You can use the predefined key performance indicators (KPIs) and preconfigured role-based dashboards for monitoring your service processes. These analytics enable you to align your organizational goals across all roles, from executive to manager to agent.

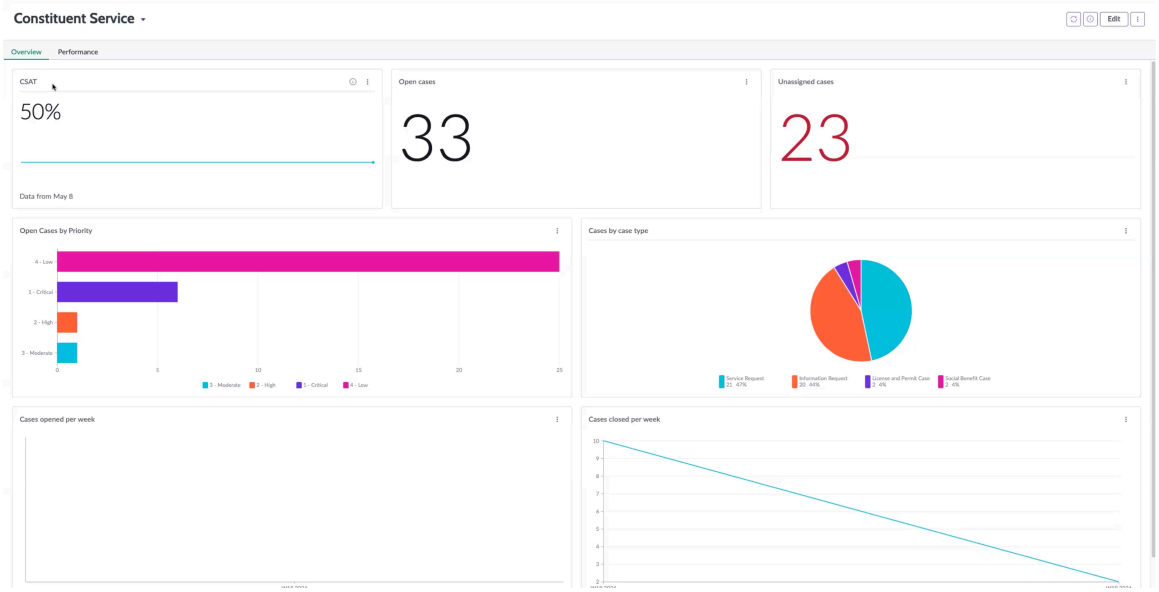
Performance Analytics dashboards

By using the preconfigured Performance Analytics dashboards, you can provide your government service managers with deep insights into how they can visualize the data over time, analyze service delivery processes, and identify areas of improvement.

The following example shows a Performance Analytics dashboard with citizen service trends and how efficient government cases were handled that month.

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Public Sector Digital Services Constituent Services dashboard



To learn more about the Performance Analytics solutions, see Analytics and Reporting Solutions for Public Sector Digital Services.

Configuring Public Sector Digital Services

Set up Public Sector Digital Services to enable government agents and service managers to provide government services to constituents, businesses, and other agencies.

Set up your environment	Configure agent workspaces	Enable communication channels
Plan and set up your PSDS environment, import your foundation data, configure access and case management	Configure your agent workspaces, including the CRM Workspace, Playbooks, Service Bridge, case routing, and advanced case management features.	Set up communication channels, including voice, email, web, and messaging.

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Implement intelligence	Set up self-service	Extend capabilities
		
Set up Intelligence features to automate routine tasks and provide recommended content to agents, such as ServiceNow Otto.	Create self-service portals for constituents that are integrated with knowledge, communities, service catalogs, and chatbots.	Set up additional PSDS features to extend the capabilities of your environment.

Other configuration tasks

In addition to installing the public sector application and playbooks, you can configure other features for public sector use:

ServiceNow® Virtual Agent

Virtual Agent, which is included with a public sector subscription, provides end-user assistance through automated conversations in chat channels.

The Public Sector Digital Services Core application offers several prebuilt public sector components (topic blocks) that conversation designers can use to create Virtual Agent conversations.

The Service Request Playbook application provides a prebuilt Virtual Agent conversation topic, Create a service request, to help constituents submit non-emergency service requests.

For details on configuring Virtual Agent for public sector use, see Configure Virtual Agent for Public Sector Digital Services.

Service definitions

A service definition enables you to map a public service, information service, or license and permit request service to your agency's service list. You can use service definitions to resolve constituent requests.

As an admin, you can create service definitions that connect the services your agency offers to the services being requested by a constituent or business. When you create a service definition, you can configure the case management processes, such as the case types, for executing those services.

For more information, see Service definitions for Public Sector Digital Services.

Relabel menu items in CRM Workspace after upgrade

After you upgrade your instance to a new release, certain menus and menu items in the CRM Workspace might not be labeled appropriately for public sector use. You can relabel the following items for public sector use by changing them in the UX list categories for Customer and Service Organizations.

For details, see Relabel CRM Workspace items after upgrade.

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Set up your environment in Public Sector Digital Services

Begin your journey by preparing your Public Sector Digital Services environment with data models, product data, user management, and case management tools to go live.

Getting started



Activate the Public Sector Digital Services core application, and import your foundation data.

Customer data



Create and manage data for internal users, such as managers, agents, and support groups.

User management



Create and manage data for internal users, such as managers, agents, and support groups.

Data models



Create and manage data models for Public Sector Digital Services.

Product data



Configure product data including product models, sold products, install base items, and installed products.

Getting started with Public Sector Digital Services

Getting started.

Activating plugins and foundation data

Task	Description
Activate Public Sector Core	As an admin, activate the Public Sector Digital Services Core plugin. The PSDS Core application provides data models, workflows, and experiences that enable the development of public sector customized applications, which deliver digital services to the government constituents. This plugin includes demo data and activates related plugins. For information on the plugins activated with Public Sector Digital Services Core, see Plugins installed with Public Sector Digital Services Core.

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Activating plugins and foundation data (continued)

Task	Description
Plugins installed with Public Sector Digital Services Core	Review the list of plugins that are activated after installing and activating the Public Sector Digital Services Core application.
Configure foundation data	Import customer information including names, addresses, and phone numbers; accounts, contacts, consumers, users, groups, group members, product models, and assets. Assign roles to groups or to individual users. Create service contracts and entitlements. Create customer relationships, asset relationships, and account teams.

Install and configure the Public Sector Digital Services Core application

Install the Public Sector Digital Services Core application and configure various features used in the application.

As admins, perform the following administration tasks to install the Public Sector Digital Services Core application and configure key features. After the Public Sector Digital Services Core application is installed, admins configure public service offerings that define services available for request and the agencies that provide them.

Install tasks for Public Sector Digital Services Core

Task	
Install Public Sector Digital Services Core	Install Public Sector Digital Services Core (sn_gsm) from the ServiceNow® Store. It provides these key features: • Government Service Portal: Used by constituents and businesses to find, track, and request government services. • Agency Services Portal: Used by admins and managers to manage internal and external agency locations. • CRM Workspace: Used by agency agents, government agents, and government service managers to interact with and assist constituents, businesses, and contributors who are authorized to represent or assist constituents and businesses. This workspace requires configuration for public sector use.
Review and assign roles to public sector users	Assign public sector roles to users or groups that have been configured in the ServiceNow AI Platform®. For additional role information, see Roles installed with Public Sector Digital Services.

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Install tasks for Public Sector Digital Services Core (continued)

Task	
Configure Public Sector Digital Services Core foundational data using guided setup	Use guided setup to customize the Government Service Portal used by constituents, businesses, and agencies; configure the CRM Workspace for agents; and set up other features for public sector use.
Optionally configure Public Sector Digital Services Core without guided setup	Customize the government service portal and configure the CRM Workspace for agents.
Configure Virtual Agent for Public Sector Digital Services	Set up Virtual Agent so that conversation designers (topic authors) can create and modify chatbot conversations for public sector use cases. Also enable your end users to run Virtual Agent in the Government Service Portal and get help with self-service tasks.
Configure a service for constituent, business, or agency	Define the type of public service offered, the service taxonomy, and agency that offers the service.

Install Public Sector Digital Services Core

You can install the Public Sector Digital Services Core application (sn_gsm) if you have an admin role. The application includes demo data.

Before you begin

- Ensure that the application and all of its associated ServiceNow Store applications have valid ServiceNow entitlements. For more information, see Get entitlement for a ServiceNow product or application.
- Review the Public Sector Digital Services Core application listing in the ServiceNow Store for information on dependencies, licensing or subscription requirements, and release compatibility.

  The Public Sector Digital Services Core application requires a subscription.

Role required: admin

About this task

For more information, see Components and Roles installed with Public Sector Digital Services Core.

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the Public Sector Digital Services Core application (sn_gsm) by using the filter criteria and search bar.

   You can search for the application by its name or ID. If you can't find the application, you might have to request it from the ServiceNow Store.

   In the list next to the **Install** button, the versions available to you are displayed.
3. Select a version from the list and select **Install**.

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In the Review Installation Details dialog box, any dependencies installed with your application are listed.

4. If you're prompted, follow the links to the ServiceNow Store to get any additional entitlements for dependencies.
5. **Optional:** If demo data is available and you want to install it, select the **Load demo data** check box.
   Demo data are the sample records that describe application features for common use cases. Load the demo data when you first install the application on a development or test instance.
6. Select **Install**.

What to do next

Use guided setup to configure the Public Sector Digital Services Core application. If you're not using guided setup, you can customize the Government Service Portal and configure the CRM Workspace for public sector use by following the optional configuration steps for Public Sector Digital Services Core.

Plugins installed with Public Sector Digital Services Core

These plugins are installed with Public Sector Digital Services Core, if they are not already active.

Note: The Application Files table lists the components that are installed with this application. For instructions on how to access this table, see Find components installed with an application.

Plugins installed with Public Sector Digital Services Core

The following plugins are activated when you enable the Public Sector Digital Services Core (com.sn_public_sector_digital_services_core)/(sn_gsm) plugin. For more information on the plugins installed with other Public Sector Digital Services Core applications, including Playbooks, see Plugins installed with Public Sector Digital Services Applications.

Plugin	Description
UI Components for Customer Portals (com.sn_ciwf_ui_cmpnt)	Provides a library of configurable components that offer better reusability, performance, and upgrade scalability for customer service portals.
Business Location (sn_bus_loc)	Enables support for businesses that interact with customers through physical channels such as stores, branches, franchises, and dealerships. Business locations can also support other service organizations.
Agency Support Model (com.sn_agency_support_model)	Provides support for agency services to connect constituents, businesses, and agencies on a single public sector vertical platform. Supports a 360-degree view of agency activity in agent workspaces.
Customer Service Case Types (com.snc.csm_case_types)	Enables agency customers to manage complex case processes by defining new case types. A case type represents an individual business process and is a collection of diverse

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Plugin	Description
	inputs and tasks that an agent performs to resolve constituent requests.
Customer Service Portal (com.glide.service-portal.customer-portal)	Supports business-to-business (B2B) organizations to support their customers. Provides out of the box self-service capabilities for customers to search information or request assistance from a service agent.
Customer Service Install Base Management (com.snc.install_base)	Enables customers to capture the current state of their install base and establish the relationship to any downstream entities that might impact their functioning.
Service Applicant Information (com.sn_svc_appl_info)	Enables customers to capture additional information entered during the case creation/ application process. Includes a data model and corresponding custom UIs to facilitate storing new applicant information, their associated financial information, and other constituent/business contact data.
Service Applicant Program Management (com.sn_svc_appl_pgm_mg)	The Service Applicant Program Management application, in partnership with Strategic Portfolio Management, empowers organizations to quickly design, configure, and launch applicant-facing programs, such as grants.
Service Request Criteria (sn_req_criteria)	Allows government service agents to view only relevant service definitions while creating a case. Service definitions can be filtered using user criteria and entity criteria which shows only relevant service definitions for agents and constituents. Admins can create new customer criteria for constituents, accounts. Constituents can see relevant service definitions in the customer portal based on customer criteria setup by admins.

Public Sector Digital Services properties

Use system properties to customize the Public Sector Digital Services application.

These properties control settings for several different features, including communication, contact relationships, and access to playbook and application data. You must have the admin role to configure these properties.

You can also access Public Sector Digital Services properties using the system property [sys_properties] table. Start by entering **sys_properties.list** in the application navigator and selecting **Enter**. You can then filter the properties by application.

For more information on the properties that are installed with Public Sector Digital Services, see Properties installed with Public Sector Digital Services

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Configure Public Sector Digital Services foundational data and workflows

With the Public Sector Digital Services Core application, you can import or create constituent information including names, addresses, and phone numbers; account and financial details; services contracts and items received; and service entitlements and contracts. You can also assign roles to users and create user relationships.

Foundation data includes the data that you must configure to support your constituents, contacts, applicants,and households, including information about:

- Constituents and Applicants (external users)
- Applicant and Household relationships
- Users (internal users such as agents and employees)
- User roles
- Service contracts and entitlements
- Service Definitions
- Install Base Items

Configure Public Sector Digital Services Core foundational data using guided setup

Walk through the guided setup processes to configure Public Sector Digital Services foundational data.

Before you begin

Install the Public Sector Digital Services Core application.

Role required: admin

About this task

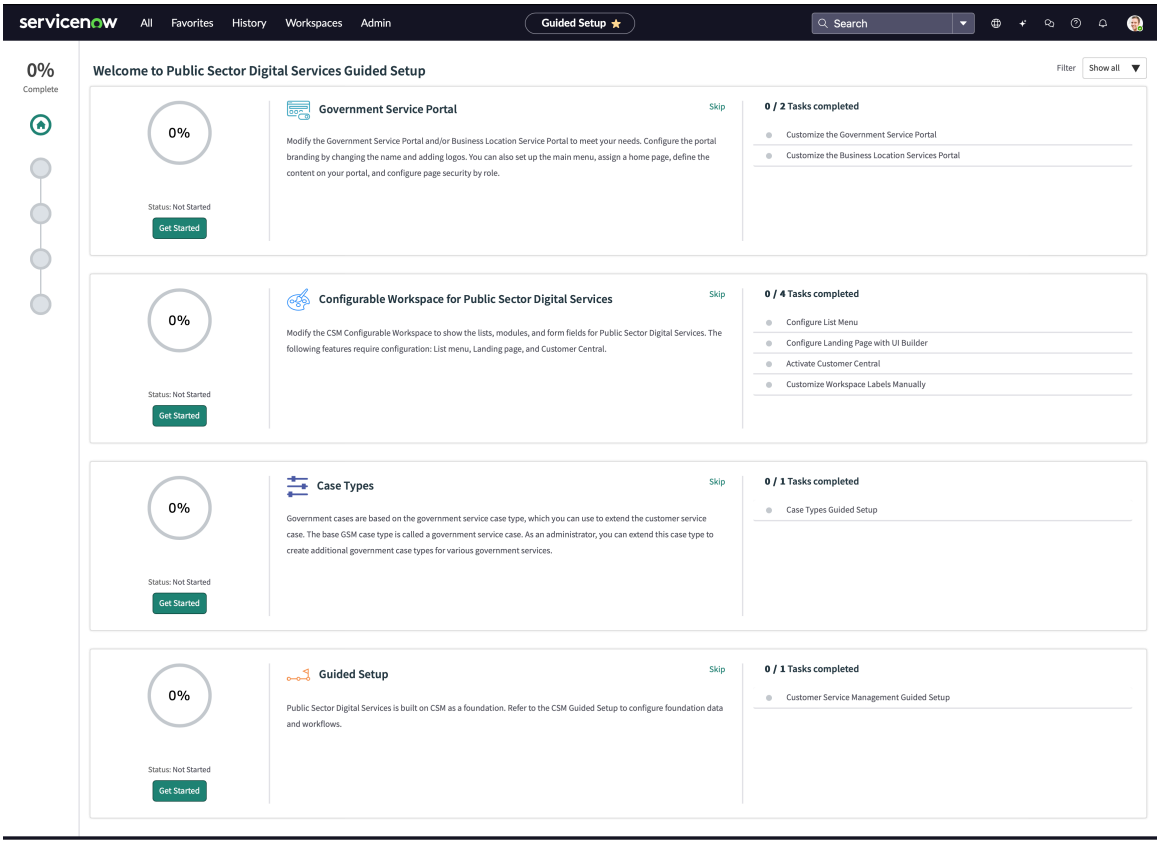
The Public Sector Digital Services Core application is built on the Customer Service Management application. As part of the guided setup for the Public Sector Digital Services Core application, you can also use guided setup for Customer Service Management to configure foundation data and workflows.

To create data, such as adding new accounts and contacts, you can use the Public Sector Digital Services application.

Procedure

1. Navigate to **All** > **Constituent Service** > **Administration** > **Guided Setup**.
   The Welcome to Public Sector Digital Services Guided setup page displays.
2. Review the **Getting Started** and *Public Sector Digital Services* **Pre-setup Checklist** sections, which give information on the setup process and the various requirements to consider before implementing Public Sector.
3. Select **Get Started** to begin the configuration.
   The guided setup reopens with a page of different categories of Public Sector Digital Services features that you can configure.

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4. In the Guided Setup category, select **Get Started**, then select the Foundation Data category and select *Get Started*.
5. To perform a task, select **Configure**.

Foundation Data configuration tasks

Task	Description
Import Accounts	In the business-to-business (B2B) model, an account is a supported external customer. Import and verify existing account data.
Import Contacts (B2B)	A contact is a user who is an employee of an account. Import and verify existing contact data.
Import Users	A user is an individual who can access your instance. Import and verify existing user data.
Import Groups	A group is a set of users who share a common purpose. Import and verify existing group data.
Import Group Members	The users associated with a group are listed as group members. Import and verify existing group member data.
Assign Roles	Roles control access to features and capabilities. The Public Sector Digital Services application provides two types of roles:

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Task	Description
	○ Internal roles for agents and managers ○ External roles for constituents, business partners, and etc Assign the necessary roles to internal and external users. For more information, see Assign roles to Public Sector Digital Services users.
Import Product Models	A product is a type of good or service that your agency provides and supports. Product models identify different types of products, such as a service.
Import Sold Products	Sold products are services and components that have been provided to an account, constituent, or business partner. Importing sold products provides an overview of the complete services and components provided to an account, constituent, or business partner.
Create product model and catalog items relationships	Enable self-service for constituents to request services on products by creating relationships between product models and catalog items.
Import Install Base Items	Install base items represent the instances that have been configured for a constituent. Each install base item references the configuration item record for the constituent.
Create Service Contracts	A service contract contains information about the type of support that is provided to a constituent. It can also include multiple service entitlements and service-level agreements (SLAs).
Create Entitlements	An entitlement defines the type of support that a constituent receives as well as the supported communication channels. Entitlements are counted and tracked using two types of units: cases and hours.
Create Account Teams and User Groups	Account teams are made up of employees who fulfill specific jobs or roles for a particular account. Create these roles, or responsibility definitions, and then assign them to employees and contacts. For more information, see .

What to do next

After you have completed the foundation setup tasks, you can set up your agent workspace with other Public Sector applications, such as Playbooks or the Performance Analytics Content Pack.

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Configuring Public Sector Digital Services customer data

Customer data constitutes the data linked to a case using associated entities such as Accounts, Contacts, Constituents, Household, Products, and Service Contracts. This information provides the government service agent the information necessary to resolve constituent issues.

The following list is a list of key entities in the Public Sector Digital Services foundational data model.

Constituent

A constituent is a customer in the business-to-consumer (B2C) business model.

Contacts

A contact is an employee of an account and can be associated with only one account. Contacts can have multiple assets and service contracts, can have one or various roles associated with them, and has a user ID and can log in to the Government Service Portal, as well as view and work from the consumer instance in Service Bridge for Public Sector Digital Services (PSDS).

An employee of a company is an example of a contact.

A contact record stores information about a contact, such as the name, phone number, and email address. Contact information is stored in the Contact [customer_contact] table.

Applicants

In the Social Benefits, License and Permits, and Grants Management space, an applicant is a user that applies for a grant, license and permit, or social benefit using the Government Service Portal.

Households

A household is a group of constituents who live at the same address and share products and services. A household can have a designated head of household and multiple current members. The head of household has access to all cases and information for the other household members.

Household information is stored in the Household table, and also includes the relationships between household members.

For more information on households in Public Sector, see Configure households in Public Sector Digital Services.

Configure households in Public Sector Digital Services

The household entity represents a group of constituents that usually share a common address and use services as a group Service Model Foundation uses the household form to store details about a constituent household, including its members, their relationships, and any cases, entitlements, or contracts associated with them.

A household is made up of constituents who have been added as members of that household.

Note: A household has an address and constituents have their own addresses. These addresses don't need to be the same to add a constituent or user as a member to a household.

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Support complex constituent/household relationships. Resolve issues related to shared services faster with access to the entire household's account history. Provide easy and secure authorized access to identified persons for streamlined engagement. Assigning a specific agent for handling all issues for a given household.

With the household entity, you can:

- Create households and add constituents as household members.
- Create cases for households and household members.
- Create relationships between household members. These relationships authorize one household member to manage cases on behalf of another member.
- Create relationships between staff members and households or household members that enable the staff members to manage cases for those households and members.
- Track information for households, including sold products, contracts, and entitlements.

Constituents can be modeled into households and exist in relationships with each other (and with specific agents). Each household can have a “Head of Household” who is able to open and manage cases on behalf of the other members of the households Note: Public Sector Digital Services specific responsibilities can be created if standards out-of-the-box responsibilities (i.e., Authorized Representative) do not fit the use case.

A household can have one member designated as the head of household. A constituent who is added as the head of household is automatically added as a member of the household.

The head of household has access to all of the cases and information for the household and the other household members. The head of household can also see:

- The sold products for the household.
- The sold products and install base items for household members.

Households can have multiple members. These members can be either constituents or constituent users. constituents can also belong to multiple households.

Membership in a household is defined by the Start Date and End Date on the Household Member form. A household member is considered to be a current member if:

- The Start Date field is empty or is filled in with today's date.
- The Start Date field is filled in with a past date and the End Date field is empty or is filled in with today's date or a future date.

Only one record with current membership dates is allowed for each constituent in a household. A constituent can leave and rejoin a household multiple times. This information is recorded using the start and end dates. As members are added or removed from a household, the member history is retained. You can find this information in the following related lists on the Household form.

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- Current Members: the constituents currently in the household.
- All Members: current and past members of a household. This list provides a history of the household. Members can appear multiple times in this list.

On the Household form, you can also find information about household cases and products in the following related lists:

- Cases: the cases that have been created for all of the members within a household
- Sold Products: the products owned by the household. These products can be owned or shared by multiple household members.

The following types of relationships can be created for households and household members. These relationships are included in the following related lists on the Household form:

- Member Relationships: relationships that have been established between household members. These relationships are created using the Authorized Representative responsibility. Household members that have an Authorized Representative relationship with another household member can act on behalf of that member and can manage cases and information for that member.
- Household Team: relationships that have been established between an agent and a household. These relationships are created using the Relationship Manager responsibility. Agents that have a Relationship Manager relationship with a household can manage all of the cases for that household.

Create or update a household in Public Sector Digital Services

Create or update a household.

Before you begin

Role required: sn_customerservice.svc_location_manager, sn_customerservice_manager, admin

About this task

A household is made up of a group of consumers who live at a common address and share products and services. A household can have a designated head of household and multiple current members. The head of household has access to all the cases and information for the other household members.

A user with the administrator role can create a household. This user can also delete a household. When a household is deleted, the system removes its references and associations—including members, sold products, cases, and work orders—but doesn't delete the associated entities.

Service Model Foundation uses the household form to store details about a consumer household, including its members, their relationships, and any cases, entitlements, or contracts associated with them.

Procedure

1. Navigate to **All** > **Constituent Services** > **Customer** > **Households**.
2. Select **New** on the Households list.
3. On the form, fill in the fields.
   For more information on the fields on the Household form, see Household form.
4. Select **Submit**.

Result

The household is added to the Households list. You can add constituents to the household entity, as well as create and manage cases for an entire household.

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Related topics

Add constituents to a household in Public Sector Digital Services

Create a relationship between household members in Public Sector Digital Services

Create and manage cases for a constituent or household in Public Sector Digital Services

Add constituents to a household in Public Sector Digital Services

Add consumers as members of a household.

Before you begin

Role required: sn_customerservice.svc_location_manager, sn_customerservice_manager, admin

About this task

You can add existing constituents from the Consumer table to a household.

- A household can have multiple consumers.
- A constituent can belong to multiple households. One household can be designated as the primary household for that constituent.

Household member records are added to the Household Member table. When a constituent is added to a household, the constituent is assigned as a unique household member number that begins with the prefix HM.

The Household form includes the following related lists for household members:

- Current Members: Constituents that belong to the household as of the current date.
- All Members: Current members and past members. The government service manager or admin can indicate that a constituent no longer belongs to the household by adding a date to the **End Date** field. A constituent that has left a household can be added back to that household.

Procedure

1. Navigate to **All** > **Constituent Services** > **Customer** > **Households**.
2. Select a household.
   For information on how to create a household, see Create or update a household in Public Sector Digital Services.
3. In the Current Members related list, select **New**.
4. Add a user from the **Consumer** table in the Constituent field.
   For information on how to add a constituent to the **Consumer** table, see Configure constituents. The **Household** field is automatically updated with the household selected in step 2.
5. **Optional:** If desired, add the date that the constituent was added to the household in the **Start Date** field.
   If the constituent is removed from the household, you can add the **End Date** field.
6. Select **Submit**.
   The constituent is added to the Current Members related list.
   On the Consumer form for this constituent, the household is added to the following related lists:
   - Current Households
   - All Households

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Result
One or more constituents are added to the household entity. You can now create relationships between constituents, as well as create and manage cases for each constituent of the household.

Related topics
- Create a relationship between household members in Public Sector Digital Services
- Create and manage cases for a constituent or household in Public Sector Digital Services

Create a relationship between household members in Public Sector Digital Services

Create a relationship between two constituents who are current members of the same household.

Before you begin
Role required: sn_customerservice.svc_location_manager, sn_customerservice_manager, admin

About this task
Relationships are based on responsibilities. A responsibility definition describes a role or a function that supports a customer or consumer. To create a relationship between two constituents in a household, use the Authorized Representative responsibility.

Procedure
1. Navigate to **All** > **Constituent Services** > **Customer** > **Households**.
2. Select a household.
3. In the Member Relationships related list, select **New**.
   This related list shows the current relationships that exist between constituent in this household. When you select **New**, a new Household Member Relationship is displayed with the **Household** field already filled in.
4. In the **Constituent is** field, select the constituent in the household to fulfill the responsibility on behalf of another constituent within the same household.
5. In the **Responsibility** field, select the **Authorized Representative** responsibility.
6. In the **of Constituent** field, select the constituent who is being represented by the constituent in the **Constituent is** field.
7. In the **Type** field, select the type from the list of related party configurations.
8. In the **Order** field, select the sequence in which you want the records to be displayed.
   By default, it is organized according to business preferences.
9. Select **Submit**.
   The relationship is added to the Member Relationships related list.

Create and manage cases for a constituent or household in Public Sector Digital Services

Staff members with the location agent role can create and manage cases for constituents and households.

Before you begin
Role required: sn_customerservice.svc_location_manager, sn_customerservice_manager, admin

About this task
Staff members at a business location who have the location agent role can create cases for households and constituents.

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Staff members or internal users who have a relationship with a household (based on the Relationship Manager responsibility) can create cases for that household and its members. Users with relationships to a household are listed in the following locations:

- The Household Team related list on the Household form.
- The Household Team Members list.

Relationship managers can perform the following actions on the cases that they can access:

- Add comments and work notes.
- Add attachments.
- Close cases.

When a constituent case is created or updated, the constituent receives an email notification. If a household is added to a case, the head of household is also notified when a case is created or updated.

Procedure

1. Navigate to **All** > *CRM Workspace* > **List**
2. Navigate to the related list of the type of case you want to create.
3. Under that related list, select **All** and select **Create New**.
4. Perform one of the following actions.

Option	Description
Add a constituent.	Select a constituent in the **Constituent** field. ○ If the constituent belongs to only one household, the **Household** field is automati cally updated. ○ If the constituent belongs to more than one household, select a household from the households that a constituent belongs to in the **Household** field. ○ If the constituent does not belong to a household, you can leave the **Household** field empty.
Add a household.	Select a household in the **Household** field. ○ If the household only has only one current member, the **Constituent** field is automati cally updated. ○ If the household has multiple current mem bers, select a constituent from the house hold members in the **Constituent** field.

5. Fill in the remaining fields on the Case form.
6. If desired, add other members of the household to the watch list.
   If a user with a Relationship Manager relationship is creating a case for a household or household member, this user is automatically added to the watch list.

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7. Select **Submit**.
   The case is added to the **Cases** related list on the Household form.

Public Sector Digital Services User Management

Configure the internal and external users for Public Sector Digital Services to provide the correct access to features, capabilities, and case data. Create relationships that facilitate case management and fulfill roles for specific accounts.

Configure user roles and groups in Public Sector Digital Services

The Public Sector Digital Services application uses roles to provide access to information, identify internal and external users, and establish different types of relationships between users and public sector entities. These roles control access to public sector data through UI-based features such as forms and lists.

Public Sector Digital Services provides many functional and granular roles that you can assign to public sector users.

You can assign roles to users or groups that have been configured in the ServiceNow AI Platform®. A user is an individual who can access your instance, and a group is a set of users who share a common purpose. The users associated with a group are listed as group members. After your users and groups are configured, you can assign roles to them. When you apply roles to groups, their members inherit the applied roles.

For more information about roles, see Roles installed with Public Sector Digital Services.

Note: Role-based access controls govern UI interactions. They do not restrict access by users with system-level scripting privileges or elevated platform roles.

You can assign roles to users and groups using guided setup, or you can use the following ServiceNow AI Platform user administration features to create users and groups and assign the appropriate public sector roles:

Configuring users, groups, and roles

To	See
Create users and groups	• Create a user. • Create a user group. • Add a user to a group.
Assign roles to users and groups	• Assign a role to a user. • Assign a role to a group.

Assign roles to Public Sector Digital Services users

Roles control access to features, capabilities, and data in the Public Sector Digital Services application.

Before you begin

Role required: admin

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About this task

You can assign roles to individual users or groups. Apply roles to groups and the members of those groups inherit those roles.

The Public Sector Digital Services application provides two types of roles: internal roles assigned to internal users such as for government service agents and managers, contributors, managers, and admins, and external roles for constituents, applicants, and business owners, contacts, channels, and partners. These roles are automatically installed with activation of the Public Sector Digital Services Core application.

Internal and External roles for Public Sector Digital Services

Internal Roles	External Roles
Gov-to-business (G2B) • sn_gsm.business_agent • sn_gsm.government_service_manager	**Gov-to-business (G2B) Customer** • sn_gsm.business_contact • sn_gsm.business_contact_admin • sn_gsm.business_case_manager **Gov-to-business (G2B) Partner** • sn_gsm.business_partner • sn_gsm.business_partner_admin • sn_gsm.business_contact
Gov-to-constituent (G2C) • sn_gsm.constituent_agent • sn_gsm.government_service_manager	**Gov-to-constituent (G2C)** • sn_gsm.constituent • sn_gsm.constituent_contributor
Gov-to-Gov (G2G) • sn_gsm.agency_agent • sn_gsm.agency_constituent_agent • sn_gsm.agency_manager • sn_gsm.government_service_manager • sn_gsm.agency_contributor	

Procedure

- You can assign roles to users and groups using guided setup.
- You can also assign roles to users and groups using the *ServiceNow AI Platform* user administration feature.
  - Assign a role to a user
  - Assign a role to a group

Related topics

Roles installed with Public Sector Digital Services

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Configure related parties for Items Received

Add related parties to an item received in the Public Sector Digital Services application so that the contacts, businesses, constituents, or agencies can get the correct access level to perform the actions that they need for a case.

Before you begin

Role required: admin, sn_gsm.constituent, sn_gsm.constituent_agent, sn_gsm.business_agent, sn_gsm.agency_agent, sn_gsm.relationship_agent, or sn_gsm.service_manager

Procedure

1. Navigate to the CRM Workspace and select the Lists icon  in the sidebar.
2. Navigate to **Item Received** > **All**.
3. Select the record that you want to add the related parties to.
4. From the Related Parties related list, select **New**.
5. On the form, fill in the fields.

Related Parties Record form

Field	Description
Type	Related party type. The related party type can be a contact, consumer, or a contributor user. You can select from the list of related party configurations for the cases that are provided with the base system: ○ Authorized Business ○ Authorized Contact ○ Authorized Constituent ○ Authorized Household ○ Authorized Agency ○ Authorized User ○ Listed Constituent ○ Listed Agency
Case	Auto-generated case number.
Business, constituent, household, or user	Contact responsible for the case.
Responsibility	Access level to the case information. When you select the related party type, the associated responsibility gets added by default. If the related party type is changed, the responsibility that corresponds with the related party type gets updated accordingly. **Note:** If the related party type is selected but the responsibility field isn't automatically filled in, your contacts don't have access to the sold product (service received) and associated case.

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6. Select **Submit**.
   The related parties are added to the case.

Result
After a related party is added to the case as an authorized representative with a functional role, the related party can perform the following actions:

- Close a case.
- Create a case for service received (sold product).
- Receive notifications on case updates.
- Update the customer-visible case tasks.
- Add additional comments and attachments.
- Accept or reject a solution.

Configuring product data in Public Sector Digital Services

Configure product data for Public Sector Digital Services including product models, sold products, install base items, and installed products.

Optional configuration steps for Public Sector Digital Services Core

As an admin, you can customize the Government Service Portal and configure the CRM Workspace for the Public Sector Digital Services Core application without using guided setup.

The Government Service Portal is tailored for public sector use, but you can customize the portal by adding your own branding such as an agency name and logo. You can also configure elements of the workspace to display public sector modules, lists, and fields, and activate other workspace features for your agents, such as Customer Central.

Set a default view for Items Received in the Public Sector Digital Services platform

Customize the default view in the Public Sector Digital Services platform workspace so that the Items Received related list is displayed under a business, constituent, or agency record.

Before you begin
Role required: none

Procedure

1. Navigate to a business, constituent, or agency record in the Public Sector Digital Services platform.
2. Select the list controls icon ( ), and select **View**.
3. Select **PSDS** from the dropdown menu.

Result
The user view is changed, and the Items Received related list is viewable.

Configure Agent Workspaces in Public Sector Digital Services

Configure agent workspaces and boost efficiency by optimizing interfaces, configuring playbooks, setting up case management and routing, and integrating tools for smooth case handling.

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Playbooks



Configure playbooks to help guide government agents through the lifecycle of a public service case.

CSM Configurable Workspace



Set up the CSM Configurable Workspace to provide agents with the tools they need to answer constituent questions and resolve requests efficiently.

Case management



Configure your case management tools to optimize case handling.

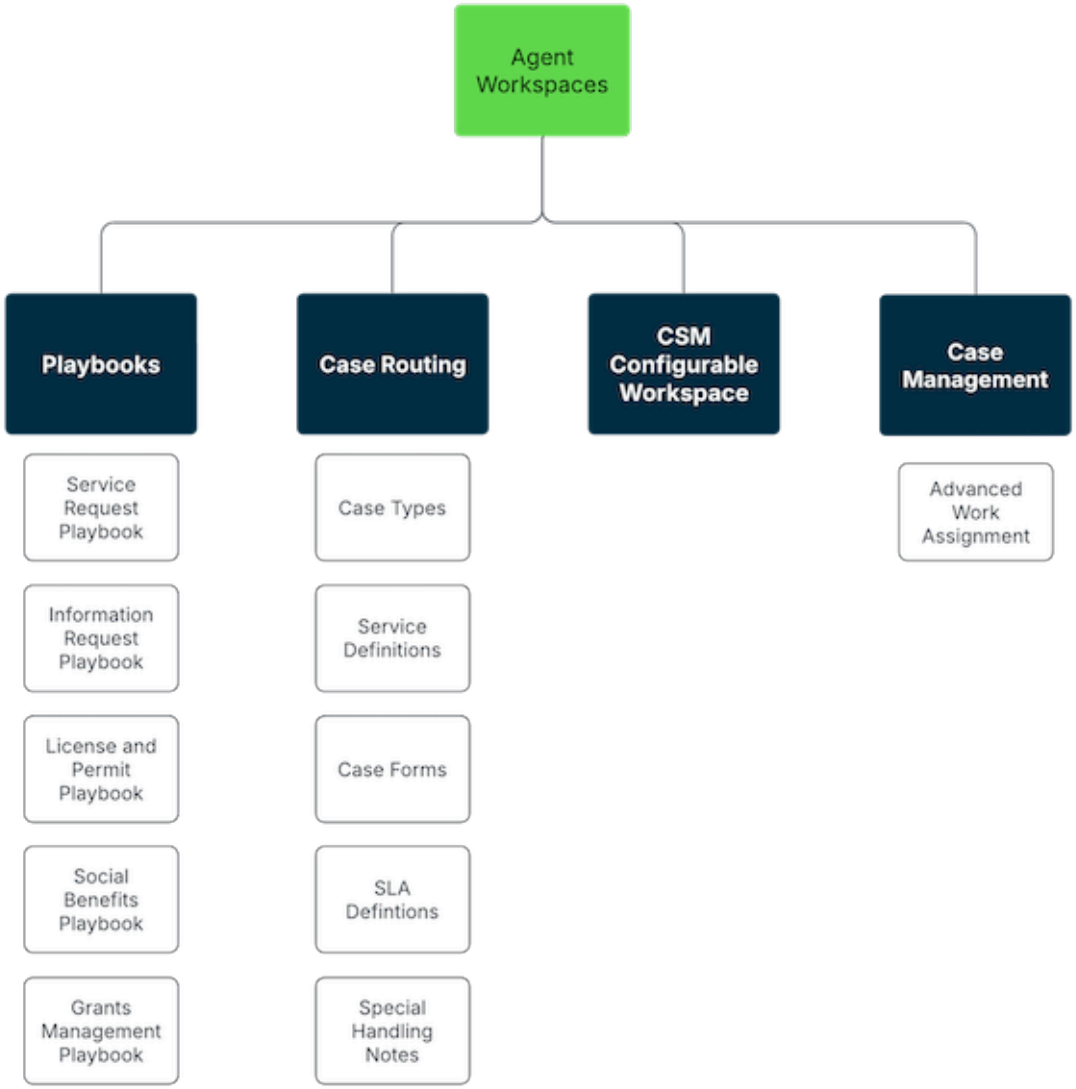
Case routing and assignment



Use Advanced Work Assignment (AWA) to automatically route cases to the appropriate government service agents in CSM Configurable Workspace.

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Agent workspaces overview



Playbooks

Install one or more playbook applications with Public Sector Digital Services. These tools provide an end-to-end workflow for handling public service requests submitted by constituents, enabling agents to resolve cases quickly and efficiently.

CSM Configurable Workspace

Set up the CSM Configurable Workspace and expand the Workspace UI to optimize agent government service processes. This user interface provides agents with the tools they need to answer constituent questions and resolve issues efficiently.

Case routing and assignment

Set up Advanced Work Assignment in the CSM Configurable Workspace to route and assign cases automatically to the appropriate agents based on their availability, capacity, and skills. This setup helps to improve efficiency and response times.

Case management

Configure your case management tools to manage cases efficiently by setting up features that permit you and your constituents to create, resolve, and categorize

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cases. Define case types for different public services, configure service definitions to link services and case types, and allow accurate tracking and resolution.

Configure Case Management in Public Sector Digital Services

Set up case management features to enable agents and constituents to create cases as needed and work to resolve those cases. Create the necessary case types to handle specific types of public services, issues, and requests. Configure service definitions to create connections between products, services, and case types.

Public Sector Digital Services case types

You can use a public service case, which is based on the Government Service case type, to extend the customer service case from the Customer Service Management application. By using a case type, you can define the processes and data that are needed to resolve your public service requests.

Overview of a case type

A case type represents the processes and data needed to resolve a specific type of constituent request. For example, within Public Sector, government service agents can use case types for different constituent needs such as requests for information, requests for maintenance, social benefits application processing, or managing licenses and permits. You can associate record producers with a certain type of case so that when you submit that record producer through the portal, it creates a case of the correct type. In addition to using service definitions, you can use the case types feature to create and configure the different types of government service cases that your agency handles. For more information on service definitions, see Service definitions for Public Sector Digital Services.

The base Government Service case type is called a public service case, and is an extension of the Customer Service case type from the Customer Service Management application. Each Public Sector Digital Services playbook application comes with its own case type (for example, Information Request Administration has an Information Request case type that comes by default, which is an extension of the base Government Service case type). The Information Request case type can be extended further if your specific use case goes beyond what it offers.

As an administrator, you can extend from existing base case types that are provided in applications out-of-the-box to create additional case types for various government services that your agency offers, or you can create and configure an entirely new case type that extends the Case table, in order to implement specific case application types, and enabling you to take advantage of prebuilt roles, business rules, and other business logic.

Creating a new case type can include creating a new table that is an extension of an existing case, or creating an entirely new case type. Typically this involves creating new roles, modules, workspaces, and other required entities. For additional information on case types, see Customer Service Case Types

All Public Sector Digital Services applications have a base case type table. Use the base case type table when adding a new case type for that application. For example, if you need a new case type in License and Permit Playbook, extend the License and Permit Base Case table, which is itself an extension of the Government Service base case table and was created to capture more specific information related only to a License and Permit case. However, if there is need for a new case type for which there is no base application in PSDS that works, extend the base PSDS case [sn_govservice_case] table.For more information on the base tables installed with each Public Sector Digital Services application, see Public Sector Digital Services Data Model.

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You can use both case types and service definitions to define the data and processes that are needed to resolve a government service request. For more information on service definitions in Public Sector Digital Services, see Service definitions for Public Sector Digital Services

When you are evaluating whether you need to create a new case type in Public Sector Digital Services, you should consider the following:

- Should I use a service definition instead of a new case type?
- Does an application already exist that I can use for my use case?
- Which base PSDS case type should I extend when creating the new case type?

Case type tasks for administrators

You can configure a case type by creating a table for the new case type that extends the government service base case table. Then, you can set up a series of processes and components for that case type.

- To get an overview of this process, see the Government Service Case Types Guided Setup.
- For more details on how to configure case types using Guided Setup, see Configuring customer service case types .

An agent can then use this custom case type to create a case to resolve a constituent or business request. .

Government Service Case Types plugin

The Customer Service Case Types plugin (com.snc.csm_case_types) is activated when you enable the Public Sector Digital Services Core plugin (sn_gsm).

Activating this plugin adds the Case Types module to the application navigator. You can use this module to create and manage case types, as well as extend the Government Service base case type.

For more information on the plugins that are installed with the Public Sector Digital Services Core application, see Components and Roles installed with Public Sector Digital Services Core.

Case Types Guided Setup

Activating the Customer Service Case Types plugin adds the Case Types section to the Public Sector Digital Services Core Guided Setup.

Navigate to **All** > **Constituent Service** > **Administration** > **Guided Setup** and use the tasks in this section to create and configure a case type.

You can configure several different processes and components for a Government Service case type by using guided setup, including the roles, access control lists (ACLs), notifications, actions, and record producers.

To create and configure a case type, do the following tasks.

- Create a table for the new case type that extends the base Case table (sn_gsm_government_service_case).
- Configure the UI actions, UI policies, and client scripts for the new case type.
- Configure the views and view rules, roles and access controls (ACLs), business rules, and more for the new case type.
- Set up the processes for the case type, including the record producers, state flows, and special handling notes.

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- Create a case type definition record for the new case type and add it to the Case Type table (sn_case_type).
- Configure the Get Case Types flow and modify the conditions that determine the visibility for a case type.

For more information on using Guided Setup for Public Sector Digital Services, see Configure Public Sector Digital Services Core foundational data using guided setup.

Government Service case type applications

The following table lists the applications available from the ServiceNow Store that use the Government Service case type and its extensions.

Government Service case type applications

Application	Description
Grants Management (sn_gsm_grnt_mgmt)	Provides an end-to-end workflow for handling applications for grants submitted by public sector end users.
Social Benefits Playbook (sn_gsm_soc_bnfts)	Provides an end-to-end workflow for handling applications for one or more social benefit programs submitted by public sector end users.
License and Permit Playbook (sn_gsm_license_permit)	Playbook that provides step-by-step guidance through the life cycle of license or permit request case. This playbook uses the license and permit request case type to capture the details of a request for new license.
Information Request Administration (sn_gsm_info_req)	Playbook that provides step-by-step guidance through the life cycle of an information request case. This playbook uses the information request case type to capture the details of a requests for various types of federal, state, and local public records that fall outside of nine exemptions.
Service Request Playbook (sn_gsm_srvc_req)	Playbook that provides step-by-step guidance through the life cycle of a service request case. This playbook uses the service request case type to capture the details of the requests for the various types of community maintenance. For more information, see Life cycle of a Public Service case. The Service Request case table [sn_gsm_service_request_case] is installed with Service Request Playbook.

Review the Service Request Playbook, Information Request Playbook, License and Permit Playbook, Social Benefits playbook, or Grants Management application listing in the ServiceNow Store for information on dependencies, licensing or subscription requirements, and release compatibility.

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Public Service case stages

The government service case type moves through the stages that are listed in the following table.

Public service request case stages

Stage	Description
Intake	Default stage for a new case.
Review	Stage when the state is updated from Draft to Open because the case is assigned and has been accepted by the agent named in the **Assigned to** field.
Process	Stage when the state is updated from Open to Work In Progress.
Decision	Stage when the state is updated from Work In Progress to Resolved.

Public Service Case states

The government case type moves through the states that are listed in the following table. For more information, see Life cycle of a Public Service case.

Public service request case states

State	Description
Draft	Default state for a new case.
New	Case that moves from Draft to New when the user selects **Submit**.
Open	Case that moves from New to Open when it's assigned and has been accepted by the agent in the **Assigned to** field.
Work in Progress	Case that moves from Open to Work in Progress when the agent selects **Start Work**.
Awaiting Info	Case that moves from Work in Progress to Awaiting Info when the agent selects **Request Info**.
Resolved	Case that moves to the Resolved state when the agent selects **Propose Solution**.
Closed	Case that moves to the Closed state when the requester selects **Accept Solution** or **Close Case**.
Cancelled	Case that is moved to the Cancelled state. This can happen through automatic timeout, or if the requester selects **Cancel**.

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Configuring Service Exchange for Public Sector Digital Services

Government agency providers communicating with other agencies, or agency providers connecting with constituents can establish an integration between multiple types of instances with Service Exchange for Public Sector Digital Services.

Install Service Exchange for Public Sector Digital Services

If you have the admin role, you can install the Service Bridge for PSDS (sn_sb_psds) application, which enables you to use Service Exchange for Providers.

About this task

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the Service Exchange for PSDS application (sn_sb_psds) by using the filter criteria and search bar.

   You can search for the application by its name or ID. If you can't find the application, you might have to request it from the ServiceNow Store.

   Visit the ServiceNow Store to view all the available apps, and for information about submitting requests to the store. For cumulative release notes information for all released apps, see the ServiceNow Store version history release notes.
3. In the application installation dialog, review the application dependencies.

   This listing indicates, for each dependent plugin and application if it's being installed, is already installed, or must be installed. If any plugins or applications must be installed, you must install them before you can install Service Exchange for PSDS.
4. If demo data is available and you want to install it, click **Load demo data**.
   Demo data contains the sample records that describe the application features for common use cases. Load demo data when you first install the application on a development or test instance. If you don't load the demo data during installation, it's unavailable to load later.
5. Select **Install**.

Configure Service Exchange for Public Sector Digital Services

To set up and configure the Service Exchange for Public Sector Digital Services application, follow these steps.

Setting up Service Exchange for Providers

Task	Link
Install the Service Exchange for Public Sector Digital Services application.	See Install Service Exchange for Public Sector Digital Services.
Set up the Government Service Portal, the consumer-facing portal for Public Sector Digital Services.	See Customize the Government Service Portal.

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Setting up Service Exchange for Providers (continued)

Task	Link
Set up a new provider record.	1. Navigate to **User Administration** > **Companies**and select the company record. 2. Add a user or contact with the sn_sb_pro.consumer role. a. To add one or more users to a company on the provider instance, navigate to **User Administration** > **Companies**and select the company record. b. Under the Users related list, select **New**. c. On the form, fill in the fields with the user information, and select **Submit**. d. Once the user record is created, navigate to the Roles related list and select **Edit**. e. Select the roles you wish to add to the user using the arrows, and select **Save**. **Note:** A user or contact with the sn_sb_pro.consumer role must be associated with the company before the company can be associated with a provider record. 3. Navigate to **All** > **Service Bridge Provider** > **Provider** 4. Enter a name for the provider, and enter the company associated with. **Note:** To create a new company record, select [magnifying glass] to open the Companies related list, and select **New**. On the form, fill in the fields. Select **Submit** to save and associate the Company record to the Provider record. See Set up a Service Exchange provider record. **Note:** If a new Company record has not yet been created, navigate to **User Administration** > **Companies** and select **New**. Enter the Company details, then select **Submit**.
Set up a Service Bridge connection between a Provider and a Consumer.	See Connect a provider instance to a consumer instance.
Assign Service Exchange roles for providers.	See User roles for providers.

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Setting up Service Exchange for Providers (continued)

Task	Link
Create catalog personas.	See Create catalog personas.
Create remote choice definitions.	See Create remote choice definitions in Service Exchange for Providers
Create remote catalog items.	See Create remote catalogs in Service Exchange for providers.
Create remote task definitions.	See Create a remote task definition in Service Exchange for Providers.
Create transforms.	See Create a transform in Service Exchange.
Update Authorized Users settings.	See Update settings for authorized users.

Install and Configure Service Exchange for Public Sector Digital Services

To set up and configure the Service Bridge for PSDS application, follow these steps.

Setting up Service Bridge for Providers

Task	Link
Install the Service Exchange for PSDS application.	See Install Service Exchange for Public Sector Digital Services.
Set up the Government Service Portal, the consumer-facing portal for Public Sector Digital Services.	See Customize the Government Service Portal.
Set up a new provider record.	See Set up a Service Exchange provider record. **Note:** If a new Company record has not yet been created, navigate to **User Administration** > **Companies** and select **New**. Enter the Company details, then select **Submit**.
Set up a Service Bridge connection between a Provider and a Consumer.	See Connect a provider instance to a consumer instance.
Assign Service Exchange roles for providers.	See User roles for providers.
Create catalog personas.	See Create catalog personas.
Create remote choice definitions.	See Create remote choice definitions in Service Exchange for Providers
Create remote catalog items.	See Create remote catalogs in Service Exchange for providers.
Create remote task definitions.	See Create a remote task definition in Service Exchange for Providers.
Create transforms.	See Create a transform in Service Exchange.

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Setting up Service Bridge for Providers (continued)

Task	Link
Update Authorized Users settings.	See Update settings for authorized users.

Create remote service catalog items in Service Exchange for Providers for Public Sector Digital Services

As a government agency provider, you can create remote catalogs to automate the task fulfillment process for constituents that are using the Government Service Portal. By using remote catalogs, agency providers can maintain the development of shared service catalogs on their instances and provide consumers with native catalog items in their instances remotely.

About this task

Remote record producers in Service Exchange for Providers are service request catalog items that are remotely published to consumer instances, and contain the variables that determine the information that a consumer can or must provide to submit a request. They enable your consumer to request provider services through their service catalog by auto-generating a Provider Task record on the provider's instance and triggering a Create Case, Create Incident, or Create Change Request fulfillment task when a request is submitted.

By using remote catalogs, agency providers can maintain the development of shared service catalogs on their instances, and provide constituents with native catalog items in their instances remotely. The Remote Catalog is maintained on the Provider's instance and made available selectively through Authorized Users.

Before you begin

Role required: admin

Note: Ensure that the catalog scope is set to Global.

Procedure

1. Log into the provider instance and navigate to **All** > **Service Bridge Provider** > **Administration** > **Remote Catalog Items**.
2. Select **New** to create a new catalog item.
3. On the form, fill in the fields.

Remote Record Producer New Record form

Field	Description
Name	Name of the remote record producer catalog item.
Application	This is a read only field and is set by default based on the application scope.
State	Shows the status of the remote record producer. When you create a remote record producer, this field is set to the **Draft** state. **Note:** This field is automatically updated when you Publish, Archive, or Retire a remote record producer.

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Field	Description
Table name	Table name is Provider Task. This is a read only field.
Flow	Choose one of the default Service Exchange flows provided or create your own flow if required.
Active	This is a read only field and is enabled based on the Publish, Retire, Archive, or Delete actions.
Persona	Catalog personas that you want to assign to this record producer.
Compatibility	This field is populated by default. It shows the Service Exchange version that is being used by the provider. If the consumer is using a compatible Service Exchange version, data can be synced between the provider and consumer instances. But if the consumer is not using a compatible version, any new entitlements cannot be activated until the corresponding Service Exchange version is upgraded.
Short Description	Short description for the record producer.
Description	Detailed description for the record producer.

4. Select **Submit**.

Result

The remote catalog item is now created, and will create a provider task in the provider instance. For more information on how to configure remote provider task definitions, see Create remote task definitions in Service Exchange for Providers in Public Sector Digital Services.

For more information on record producers in Service Exchange, see Remote record producers in Service Exchange

Create remote task definitions in Service Exchange for Providers in Public Sector Digital Services

As a government agency provider, you can create remote task definitions that trigger the assignment of remote task(s) to your constituent. Remote tasks originate in the agency provider instance (where they auto-create an associated government case record), and are pushed to your constituent through the Government Service Portal, enabling both provider and consumer to keep case records and details in sync.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **Service Bridge Provider** > **Administration** > **Remote Task Definitions**.
2. Click **New**.
3. On the form, fill in the fields.

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Remote Task Definition form

Field	Description
Name	Name of the remote task definition record.
Application	This is a read only field and is set by default based on the application scope.
State	Shows the status of the remote task definition. When you create a remote task definition, this field is set to the **Draft** state. **Note:** This field is automatically updated when you Publish, Archive, or Retire a remote task definition.
Provider table	Any task table that you select from the list. For example, you can choose a case table or an incident table.
Consumer table	Any task table that you select from the list. For example, you can choose a case table or an incident table.
Compatibility	This field is populated by default. It shows the Service Exchange version that is being used by the provider. If the consumer is using a compatible Service Exchange version, data can be synced between the provider and consumer instances. But if the consumer is not using a compatible version, any new remote task definitions cannot be activated until the corresponding Service Exchange version is upgraded.
Maintain SysID	If this field is checked, then the unique identifier, SysID, associated with the parent that created the remote task will be used and assigned to the parent task created for the remote task on the consumer instance.
Send attachments	If this is selected, if an attachment is added on the parent record, it is sent to the remote task.
Copy attachment to parent	If an attachment is included with a remote task, a copy is sent to the parent record.
Short description	Brief information about this remote task definition.
Description	More detailed information about this remote task definition.

4. Click **Submit**.
5. Open this new Remote task definition record.
6. On the **Inbound fields** related tab, click **New**.

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7. On the form, fill in the fields.
   The inbound fields enable you to receive data from the consumer's instance when a remote task is created or updated.

   Note: If the inbound field values are updated, the updated information is shown in a work note on the parent record.

Inbound field form

Field	Description
Field label	Field label that appears on the remote task form.
Field name	Field name that is used in the remote task flow and script.
Max length	Maximum length of the source field name.
Sync when	Enables you to specify when a target field on the remote task's parent record is directly updated. You can select: ○ **Insert:** Updates the target field on the remote task's parent record only when the remote task is initially inserted. ○ **Insert or Update**: Updates the target field on the remote task's parent record every time the remote task is updated. ○ **Never**: The inbound field never updates a target field on the remote task's parent record directly. For example, you can use this field for state mapping where a flow is used to convert the incoming value before updating the target field. **Note:** Irrespective of the option you select here, whenever an inbound field is updated, the changes are reflected in a worknote on parent record.
Source Mapping tab	This tab is not displayed if you have selected the **Virtual** check box to define a virtual field mapping.
Source table (read-only)	The Consumer table that you selected while creating the remote task definition.
Source field	Field from the source table that is sent to another ServiceNow instance. Source fields allow for Dot-walking to data in related tables, which is useful when reference data is not available between ServiceNow instances. For example, you can create multiple inbound mappings for change incidents (CIs) to include the name, class, IP address, and asset tag.

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Field	Description
Target Mapping tab	Displayed only in the following conditions: ○ Sync when: You select **Insert** or **Insert or update**. ○ Virtual: You select this check box to enable virtual field mapping.
Target table (read-only)	The Provider table that you selected while creating the remote task definition.
Target field	Field from the target table that is sent to another ServiceNow instance. **Note:** If you are defining a virtual field mapping, the field you select in the target table is not present in the source table.
Active	This field is enabled by default.
Virtual	Select this check box to enable virtual inbound field mapping. A virtual field is a field that is present in the target table but does not exist in the source table. When a source table doesn't contain a field that exists on a target table, the field is configured as a virtual field. The values specified for the virtual field are passed from the source instance to the target instance. The consumer can create a remote task to sync data and update the value of the virtual field in the associated target task record. The target field can be updated either by using the Virtual Inbound option described in the Create a transform in Service Exchange or by using the *updateVirtualField* API.

8. Click **Submit**.
9. On the **Outbound fields** related tab, click **New**.
10. On the form, fill in the fields.
    The outbound fields enable you to send data to the consumer's instance when a remote task is created or updated.

Outbound field form

Field	Description
Field label	Name of the field label that appears on the remote task form.

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Field	Description
Field name	Field name that is used in the remote task flow and script.
Max length	Maximum length of the field name.
Sync when suggestion	Enables you (the provider) to suggest to the consumer when a target field on the remote task's parent record should be directly updated. The consumer can change this setting before activating the definition ○ **Insert:** Updates the target field on the remote task's parent record only when the remote task is initially inserted. ○ **Insert or Update**: Updates the target field on the remote task's parent record every time the remote task is updated. ○ **Never**: The inbound field never updates a target field on the remote task's parent record directly. For example, you can use this field for state mapping where a flow is used to convert the incoming value before updating the target field.
Source Mapping tab	This tab is not displayed if you have selected the **Virtual** check box to define a virtual field mapping.
Source table (read-only)	The Provider table that you selected while creating the remote task definition.
Source field	Field from the source table that is sent to another ServiceNow instance. Source fields allow for Dot-walking to data in related tables, which is useful when reference data is not available between ServiceNow instances. For example, you can create multiple inbound mappings for change incidents (CIs) to include the name, class, IP address, and asset tag.
Target Mapping tab	Displayed only in the following conditions: ○ Sync when: You select **Insert** or **Insert or update**. ○ Virtual: You select this check box to enable virtual field mapping.
Target table (read-only)	The Consumer table that you selected while creating the remote task definition.
Target field	Field from the target table that is sent to another ServiceNow instance.

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Field	Description
	Note: If you are defining a virtual field mapping, the field you select in the target table is not present in the source table.
Active	This field is enabled by default.
Virtual	Select this check box to enable virtual inbound field mapping. A virtual field is a field that is present in the target table but does not exist in the source table. When a source table doesn't contain a field that exists on a target table, the field is configured as a virtual field. The values specified for the virtual field are passed from the source instance to the target instance. The target field can be updated either by using the Virtual Outbound option described in the Create a transform in Service Exchange or by using the *`updateVirtualField API`*.

11. Click **Submit**.
12. On the **Consumer criteria** related tab, click **New**.
13. On the form, fill in the fields.
    Consumer criteria enable you to manage which consumers can use these remote task definitions.

    Consumer criteria form

Field	Description
Consumer condition	Customer company or account that you want this remote task definition to be entitled to.
Remote task definition	Name of this remote task definition record. This name is auto-filled.

    For more details on consumer criteria, see Creating entitlements in Service Exchange for Providers.
14. Click **Publish**.

    Remote task variables are automatically created when you publish a remote task definition. These variables are the data variables for the inbound fields displayed and can be accessed on the remote tasks.

Result

A remote task definition record is created on your instance. This record is also synchronized with your customer's instance and is now pending activation on your consumer's instance. If the

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Auto activate remote task definition field has been enabled by the consumer, the remote task definition is automatically activated on your consumer's instance.

Configuring Service Exchange for Consumers for Public Sector Digital Services

You can do the following configuration tasks to customize your Service Bridge for consumers instance, the Government Service Portal.

Related topics

Activate remote catalog item entitlements for Service Exchange Consumers

Activate remote catalog item entitlements for Service Exchange Consumers

Create an entitlement for a remote catalog item/record producer so that the associated service will be displayed in the constituent(s) Government Service Portal catalog for use. You can entitle content explicitly to a single constituent, or to multiple constituents in designated groups.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **Service Bridge Consumer** > **Provider Connections**.
2. Selecting the record number in the **Number** column to open the Provider connection record.
3. In the **Remote record producers** related table, select the remote record producer (RRP) you want to activate.
4. On the Remote record producer page, select **Activate** to activate the entitlement.
5. **Optional:** Select the Remote task definition tab and select a remote task definition that you want to activate.
   For information on how to utilize remote task definitions to create task assignments between constituent and agency provider instances, see Create remote task definitions in Service Exchange for Providers in Public Sector Digital Services.
6. In the Remote task definition page, select **Activate** to activate the entitlement.

Result

The remote record producer is now added to the configured catalog and is visible on the consumer instance, the Government Service Portal.

Set up a Service Exchange connection between a Provider and a Consumer

Establish an instance-to-instance integration between a provider and a consumer using Service Exchange for Public Sector Digital Services.

Before you begin

Role required: admin

A provider record must have been created. See Set up a Service Exchange provider record.

A business or account must exist for the consumer in the provider's instance, and a user or contact with the sn_sb_pro.consumer role must be associated with the company. A business or account must exist for the provider in the consumer's instance. If this is a production instance, the user must have a valid email address to receive the registration email.

Run the **Key Management** > **Health (Diagnostics)** to ensure that the Key Management Framework health check has passed. Your administrator must have the sn_kmf.admin and sn_kmf.cryptographic_manager roles to access the health diagnostics. If your administrator does not have access, follow the instructions in Assign Key Management Framework roles to grant the required roles.

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About this task

Before proceeding, the provider should have requested the contact details of an admin to set as the main point of contact on their registration record. This designated contact person will receive an email either from the provider's instance or directly from the provider's admin, containing a registration link. Selecting on this link will generate a Provider Connection record in your consumer instance.

Procedure

1. Navigate to **All** > **Service Bridge Provider** > **Consumer Registrations** and select **New**.
2. On the form, fill in the fields:
   - Select the Company associated with the consumer instance being registered.
   - Select the contact details associated with the Company you have selected.

     Note: This contact must be an admin user in the consumer instance, otherwise the registration process cannot be completed. On the provider instance, only a Service Bridge Consumer role is required.

   - Select the **Lock** icon on the URL field and enter the URL of the consumer ServiceNow instance.
3. Select **Save**.
   An email is generated and sent to the Consumer Contact specified during registration if email sending is enabled. If not, the admin must either copy the link from the work notes and manually send it to the consumer admin. The Consumer Contact must follow the steps listed in the Connect to a provider to complete the registration process on the consumer instance.
4. Select the **Connect to Provider** link sent in the provider's registration email or follow the link given to you directly by the provider's admin.
   This link will generate the Provider connection record.

   Note: The consumer admin completing the registration process must be the named contact on the provider's registration task or an admin in the provider's instance. Registration will fail during the OAUTH authentication step if attempted by another user.

5. Navigate to **All** > **Service Bridge Consumer** > **Provider Connections**.
6. On the Provider Connection form in the consumer instance, select the name of the Company that the provider is associated with and select **Save**.
   The Provider Connection record is displayed.
7. Select **Connect to Provider** in the Provider connection record page.
8. Select **Authenticate** when the Service Exchange registration message appears.
   The OAuth authentication page appears.
9. Select **Allow** and then select **Submit** to proceed with the registration.
   You are redirected to the Registration task where you can view the status. When registration is completed, a connection is established between the provider and the consumer instances, and the registration task State is set to **Closed Complete** on the provider's instance.

Service definitions for Public Sector Digital Services

Service definitions are records used to store the details about a service provided to end users. By using a service definition, you can connect a public service with a case type to extend the types of services that can be requested, and the types of cases that can be created to support those services.

You can also configure the support types for those services.

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Overview of a service definition

In addition to case types, you can use a service definition to create a customized process for connecting a requester with the service needed to resolve their claim. A service definition enables you to map a public service, information service, or license and permit service to the list of services your agency offers for resolving that request. When you create a service definition, you can configure the case management processes, such as the case types, for executing those services.

In addition to case types, you can also use service definitions to create a customized process. Service definitions are configurations that sit on top of a specific case type that provide a unique request and fulfillment process. Use service definitions when adding a new use case within a domain that already has a case type and is for an existing persona. In this case, service definitions allow for faster development of new use cases.

Service definitions enable you to do the following tasks:

- Configure the support types for services so that applicable services are displayed based on the service requested by the constituent or business.
- Create the case types that support the requested services.
- Automatically select a case type that is based on the service or information type that a constituent or business is requesting.

With a service definition, you establish connections between the public services that are requested and those that are offered. By associating the relevant public services that are offered for the services requested, you can use a service definition to simply the service requests that are based on the constituent's context.

Service definitions are available with the Customer Service Case Types plugin (com.snc.csm_case_types) that is automatically activated when you enable the Public Sector Digital Services Core plugin.

For more information on how to create a service definition, see Configure a service definition for Playbooks in Public Sector Digital Services.

Service definition tasks for administrators

The following main components are needed to create a service definition:

- Service definition record created for the new service.
- New view and view rule created for the new service on the case type table.
- New flow created for the new service which is triggered on the creation of the new record on the case type table. Flows are only needed for more complex use cases, such as ones with multiple tasks or sub-tasks.
- New record producer for requester to create via service catalog. Only use record producers if you want an end-user to create the request.

Service definitions

The following are the main components needed to create a service definition: For additional more information on Service definitions, see Service definitions for Public Sector Digital Services.

You can do the following tasks:

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- Define the available services.
  - Define the details for each public service that is offered.
  - Associate a playbook with a service.
  - Associate a service catalog item with a service definition so that constituents or businesses can request this service directly.
- Associate the relevant public services that are offered with each request.
- Associate different services with different case types (This task automates the case type selection for the agents by the service that they select).

Associate an agency location to a Public Service definition

Associate your government service agency locations with a service definition using the Public Sector Digital Services (PSDS) application. With this association, your government service agency staff can address constituent requests for documents, records, or services that are offered at a particular agency location, and can raise a case on behalf of a constituent or business.

Before you begin

Role required: admin

About this task

An agency location can have multiple public services associated with it. This can include 311 service or maintenance requests, federal or state public records requests, or requests for license and permit services. For example, a specific agency location can offer an application for food stamps or medical assistance, but not an application for a CDL license or a commercial fishing license. A public service-to-agency-location criteria association can be added to each existing service definition in the Service Organizations offering Service [service_organizations_offering_service] table.

Procedure

1. Navigate to **All** > **Customer Service** > **Administration** > **Service Definition**.
2. Select a service definition by selecting the number.
3. In the Service Organizations offering Service related list, select **New**.
4. On the form, fill in the fields.

Agency Locations offering Public Service form

Field	Data type	Description
Service Organizations/ Agency Location criteria	Reference	Criteria to define the agency locations that provide the service.
Service definition	Reference	Service that this specific agency location provides.

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Field	Data type	Description
		Note: The **Service definition** field is automatically filled in with the name of the selected service definition.
Active	True/False	Check box to activate or deactivate the agency location criteria. By default, the active field is set to **True**. **Note:** Only one active criterion is enabled per table to be associated to a service definition.

5. Select **Submit**.
   The agency locations criteria are added to the Agency Locations offering Public Service related list.

Set up the CRM Workspace for Public Sector Digital Services

Modify the CRM Workspace to show the lists, modules, and form fields for Public Sector Digital Services.

Playbooks depend on having a workspace set up for your fulfillers (i.e., agents and managers) to utilize. For Public Sector Digital Services, the modification of the CRM Workspace is required to make fields, forms, etc. relevant to PSDS.

Public Sector Digital Services provides the following workspaces:

- CRM Workspace
- CSM Agent Workspace

These workspaces can be modified as required through the UI Builder. Certain features in the CRM Workspace require configuration for use with Public Sector Digital Services:

- List Menu
- Public Sector landing page
- Customer Central

Note: You can use guided setup to configure these configurable workspace features. For details, see Configure Public Sector Digital Services Core using guided setup.

Configure the List Menu for Public Sector Digital Services

Add public sector-related menu options to the List Menu in the CRM Workspace.

Before you begin
Role required: admin

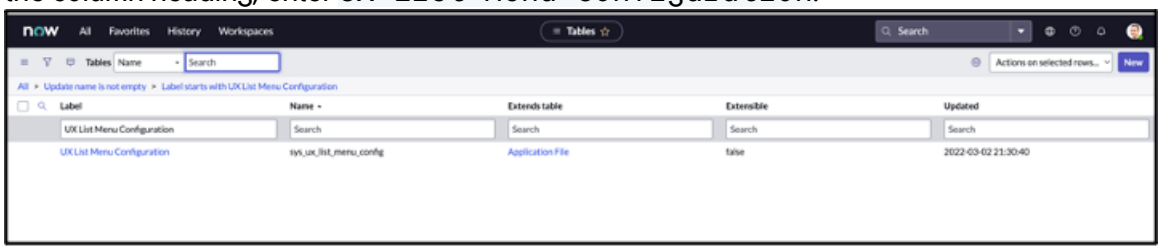
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About this task

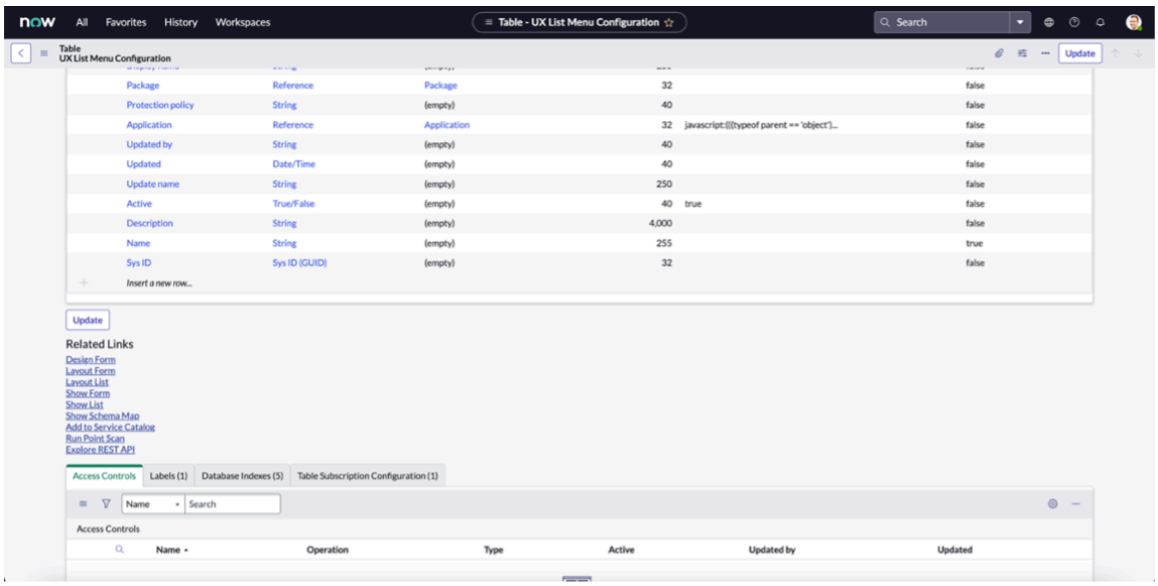
To configure the List Menu, you can follow this procedure or use guided setup for the Public Sector Digital Services Core application.

Procedure

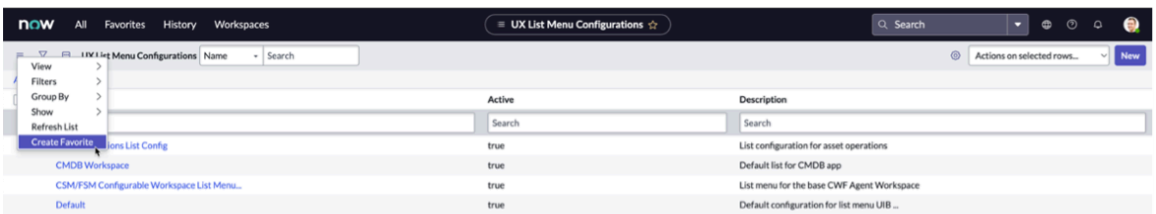
1. Navigate to **All** > **System Definition** > **Tables**.
2. In the Tables [sys_db_object] table, select the **Search** icon next to the **Label** column and under the column heading, enter `UX List Menu Configuration`.



3. In the UX List Menu Configuration List table, go to **Related Links** and select **Show List.**



4. **Optional:** From the Context menu, select **Create Favorite** to bookmark the UX List Menu Configurations table so that you can quickly access it if you must make changes later.

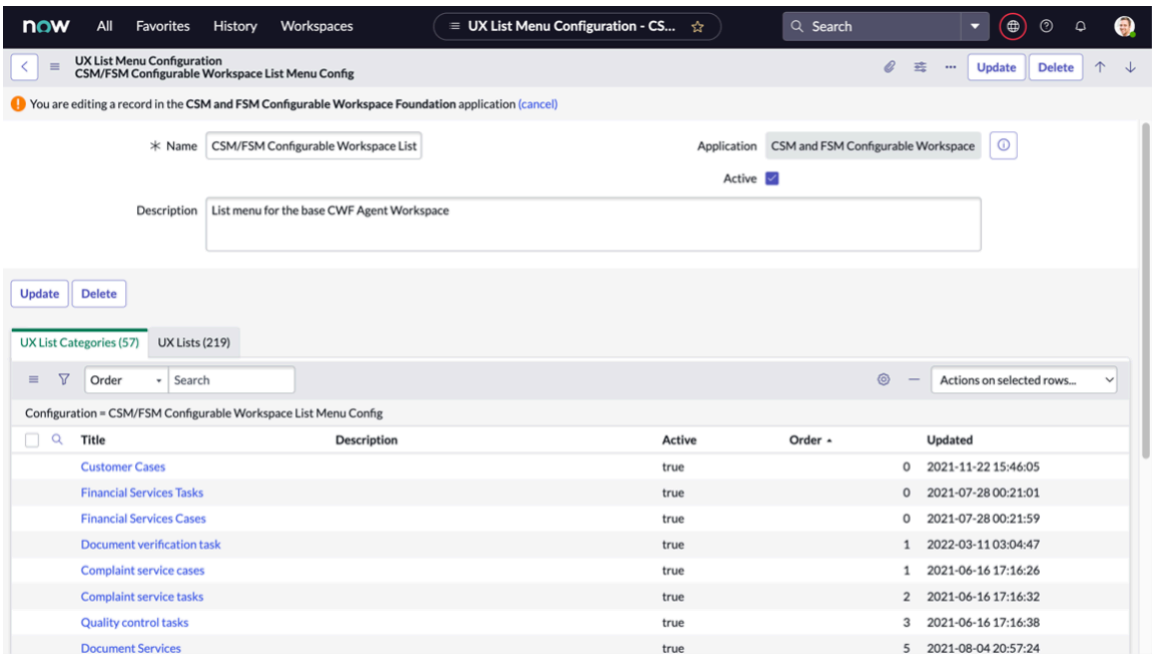


(Optional)

5. Remove the categories that are not applicable to Public Sector Digital Services.

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a. Select the **CSM/FSM Configurable Workspace List Menu** record and go to the **UX List Categories** tab.



b. For each of the following categories, select the category record and change the Active value to false:

Note: If the following message is displayed, select **here** to edit the page.



- Cases
- Major Issue Management
- Tasks
- Service Level Agreements (SLAs)
- Incidents
- Problems
- Change
- Requests
- Catalog Tasks
- CMDB
- Conversation Monitoring

What to do next

Configure the Public Sector landing page using UI Builder.

Configure the Public Sector landing page with UI Builder

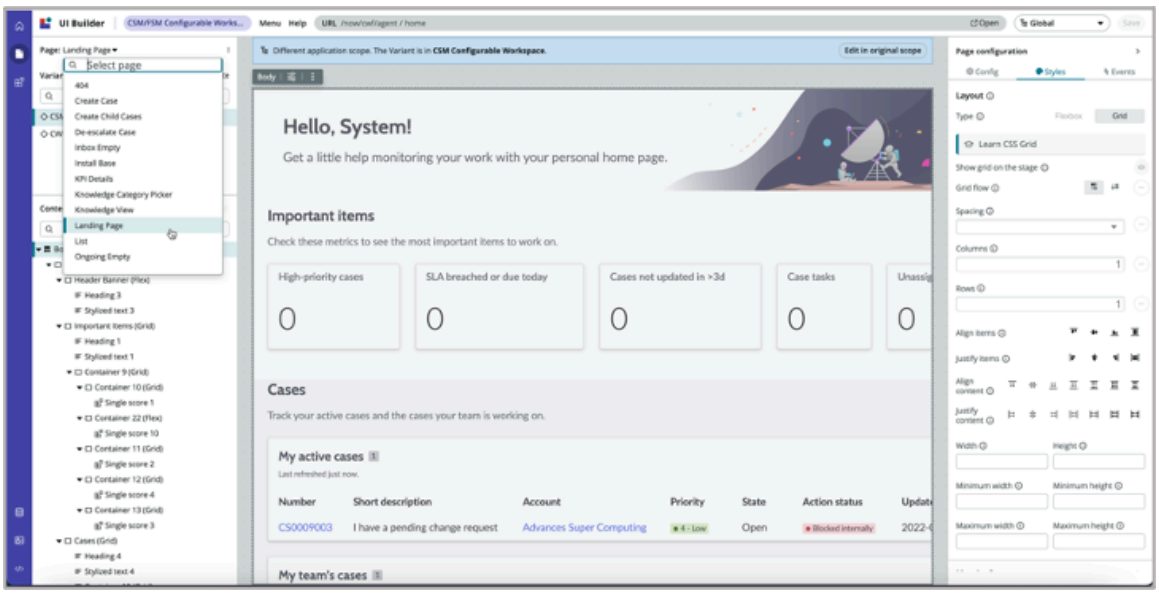
Use the UI Builder to change certain fields in the Public Sector landing page of the CRM Workspace.

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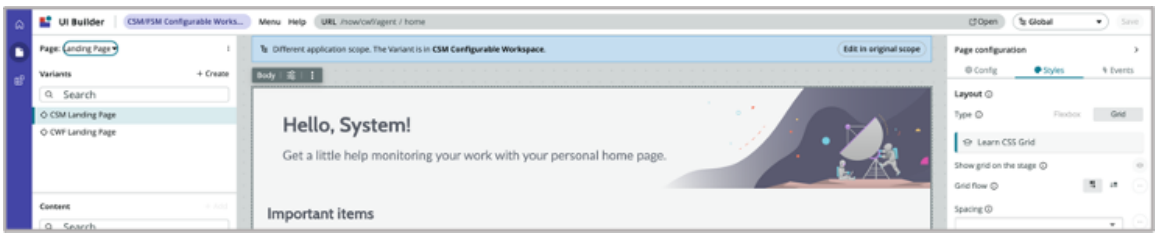
Before you begin
Role required: admin

About this task
The Customer Service Management (CSM) landing page gives agents an overview of their new, assigned, and high-priority cases, plus the cases assigned to their groups. Replace certain fields in the landing page with fields relevant to Public Sector Digital Services. You can also add or change other fields as needed. For more information on using UI Builder to modify pages, see Work with pages.

Procedure
1. Navigate to **All** and in the filter, enter **UI Builder**.
2. Select **UI Builder**.
3. Navigate to the Customer Service Management (CSM) landing page:
   a. In the list of **My experiences**, select the **CSM/FSM Configurable Workspace**.
   b. In **UI Builder**, navigate to **Page** > **Landing Page** and select **CSM Landing Page**.

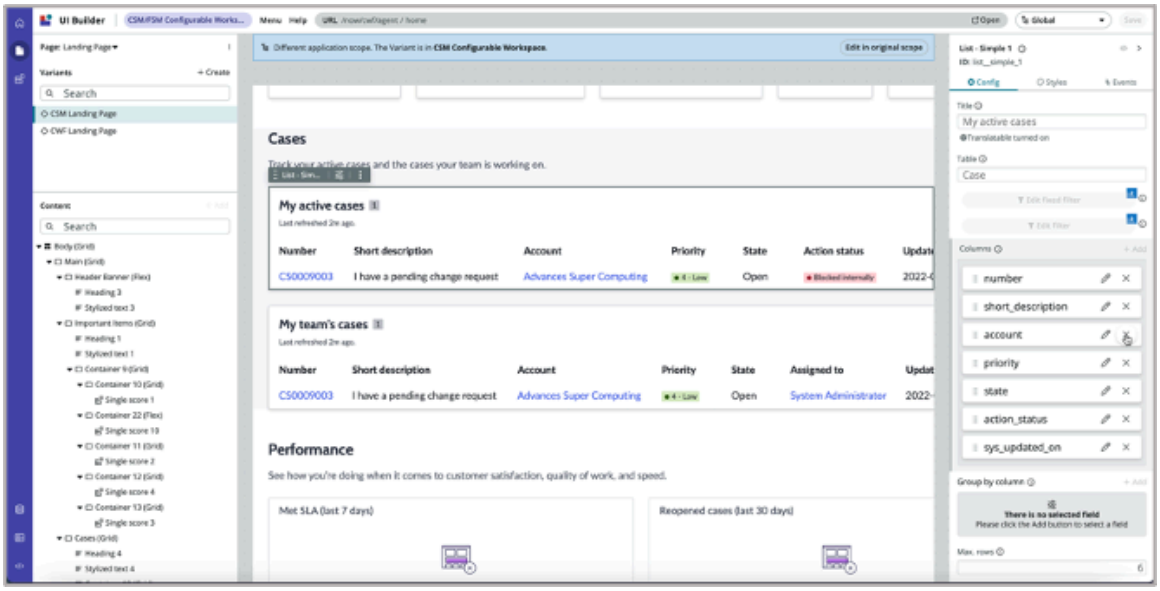


   c. In the message displayed at the top of the page, select **Edit in original scope**.



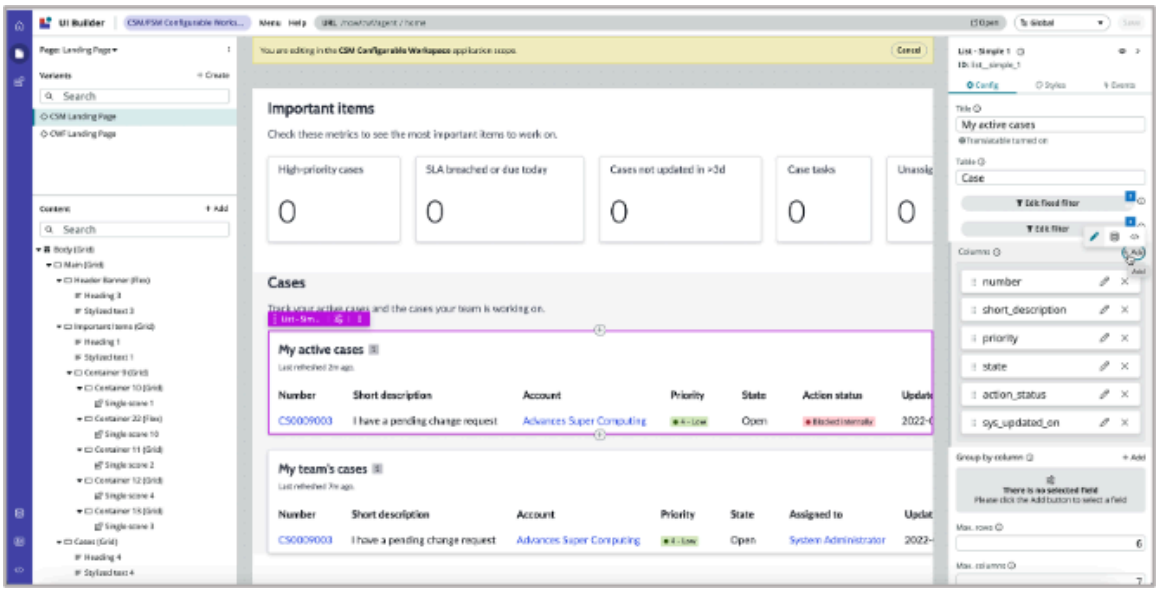
4. In the Customer Service Management (CSM) landing page, select the **My active cases** component and in the **Config** tab of the Configuration pane, delete the **account** field from the **Columns**.

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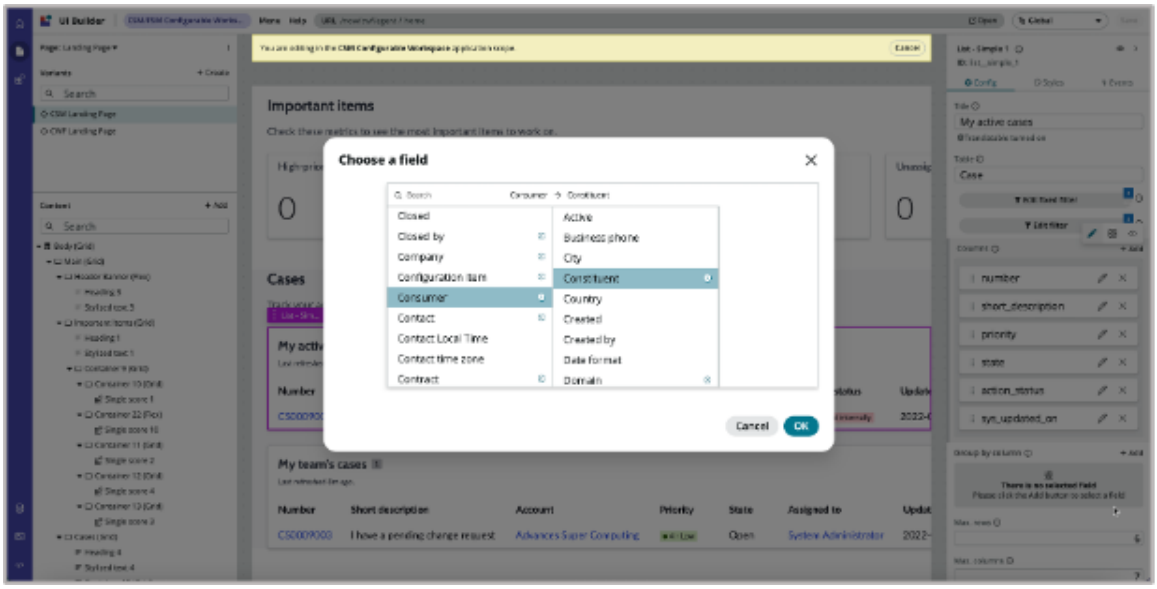
5. Add the **Constituent** field:

a. In the Configuration pane, select **+Add** in the **Columns** list to open the field chooser.

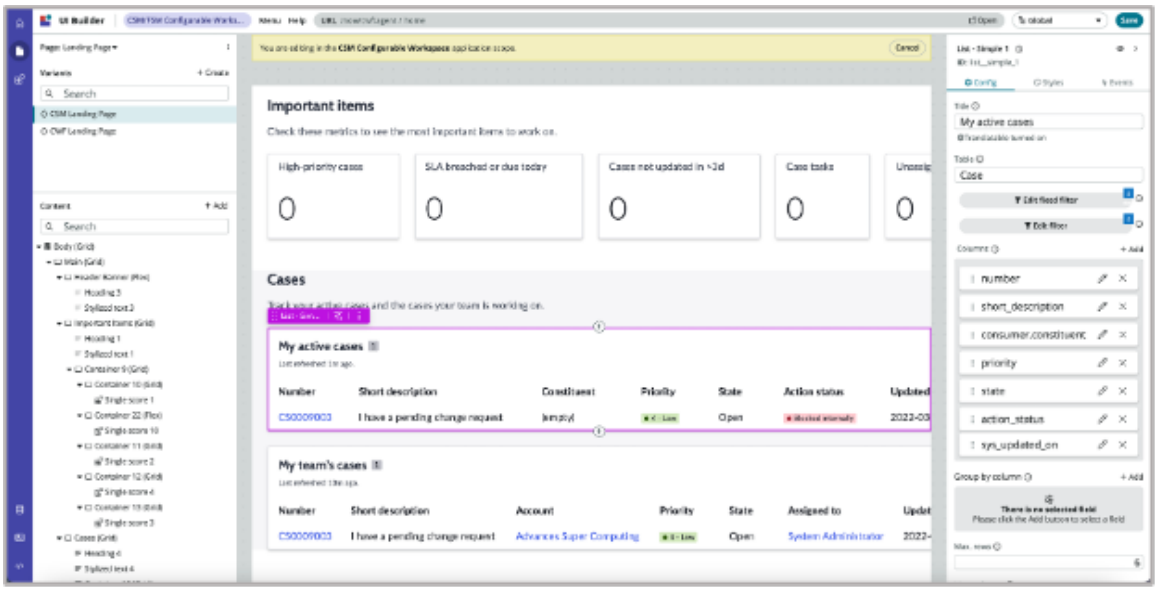


b. In the Choose a field list, select **Consumer** > **Constituent**, then select **OK**.

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c. In the Configuration pane, rearrange the columns by moving **consumer.constituent** below **short.description**.



6. Repeat Steps 3 and 4 to change the **My Team's cases** component.
7. Make other page changes as needed.
8. Select **Save** to save the landing page changes.

Activate Customer Central for viewing profile information

Install Customer Central using Customer Service Guided Setup so that agents can have a complete view of constituent, business, or agency information in Public Sector Digital Services.

Before you begin

Role required: admin

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About this task

Customer Central displays all the touchpoints that a constituent, business, or agency has with a government center or agency, in the form of information cards. For more information on Customer Central and how it functions with CRM Workspace, see Customer Central.

Procedure

1. Navigate to **All** > **Customer Service** > **Administration** > **Guided Setup**.
2. In the section **Customer Central - Customer Information for CSM Configurable Workspace**, locate the list of tasks for setting up the configurable workspace.
3. Select **Activate Customer Central** to install the plugin.

   After installation, one of the following tabs is available on the interaction record:

   - The **Constituent Information** tab when the **Constituent** tab is populated.
   - The **Business Information** tab when the **Business** tab is populated.
   - The **Agency Information** tab when the **Agency** tab is populated.

   You can perform other changes to this layout, as needed. For more information, see Configure the Customer Information view using the CSM Configurable Workspace.

Relabel CRM Workspace items after upgrade

After you upgrade your instance for the first time, you can relabel certain items in the CRM Workspace for public sector use.

Before you begin

Role required: admin

About this task

Certain menus and menu items in the CRM Workspace are relabeled for public sector use. However, after upgrading your instance, those items revert to the original labels used for Customer Service Management (CSM). You can relabel the following items for public sector use by changing them in the UX List Categories for Customer and Service Organizations.

Label changes in CSM Configurable Workspace for public sector

CSM label	Change to public sector label
Accounts	Businesses
Consumers	Constituents
Internal Business Location	Internal Agency
External Business Locations	External Agency
Service Organization External Staff	External Staff

Procedure

1. Navigate to **All** > **System Definition** > **Tables**.
2. In the Tables context menu, select **Label** and in the **Search** box enter `*UX list` to search for lists, then select the UX List Category record.
3. In the UX List Category record, scroll down to the Related Links section and select **Show List**.

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a. In UX List Categories, select the **Customer** record.

b. In the UX List Category for Customer form, go to the UX Lists section and select the **Consumers** record.

c. In the **Title** field of the UX List Category for Consumers form, change `Consumers` to `Constituents` and select **Update**.

4. In UX List Categories, select the **Accounts** record.

a. In the **Title** field of the UX List Accounts form, change `Accounts` to `Businesses`.

b. Select **Update**.

5. In UX List Categories, select the **Service Organizations** record.

a. In the **Title** field of the UX List Service Organizations form, change `Service Organizations` to `Agency`.

b. Select **Update**.

6. In the UX List Category Agency form, go to the UX Lists section and do the following:

a. Select the **Internal Business Location** record.

b. In the **Title** field of the UX List Internal Business Location form, change `Internal Business Location` to `Internal Agency`.

c. Select **Update**.

d. Return to the UX Lists section, and repeat steps a through c for the **External Business Location** record.
In the **Title** field, change `External Business Location` to `External Agency`.

e. Return to the UX Lists section and repeat steps a through c for the **Service Organization External Staff** record.
In the **Title** field, change `Service Organization External Staff` to `External Staff`.

Relabel Business Location Services portal (BLSP) items after upgrade

Using Guided Setup, you can optionally modify the "Business Location Details" page in the Business Location Services Portal to be relabeled "Agency Location Details" using Public Sector Digital Services terms during configuration.

Before you begin
Role required: admin

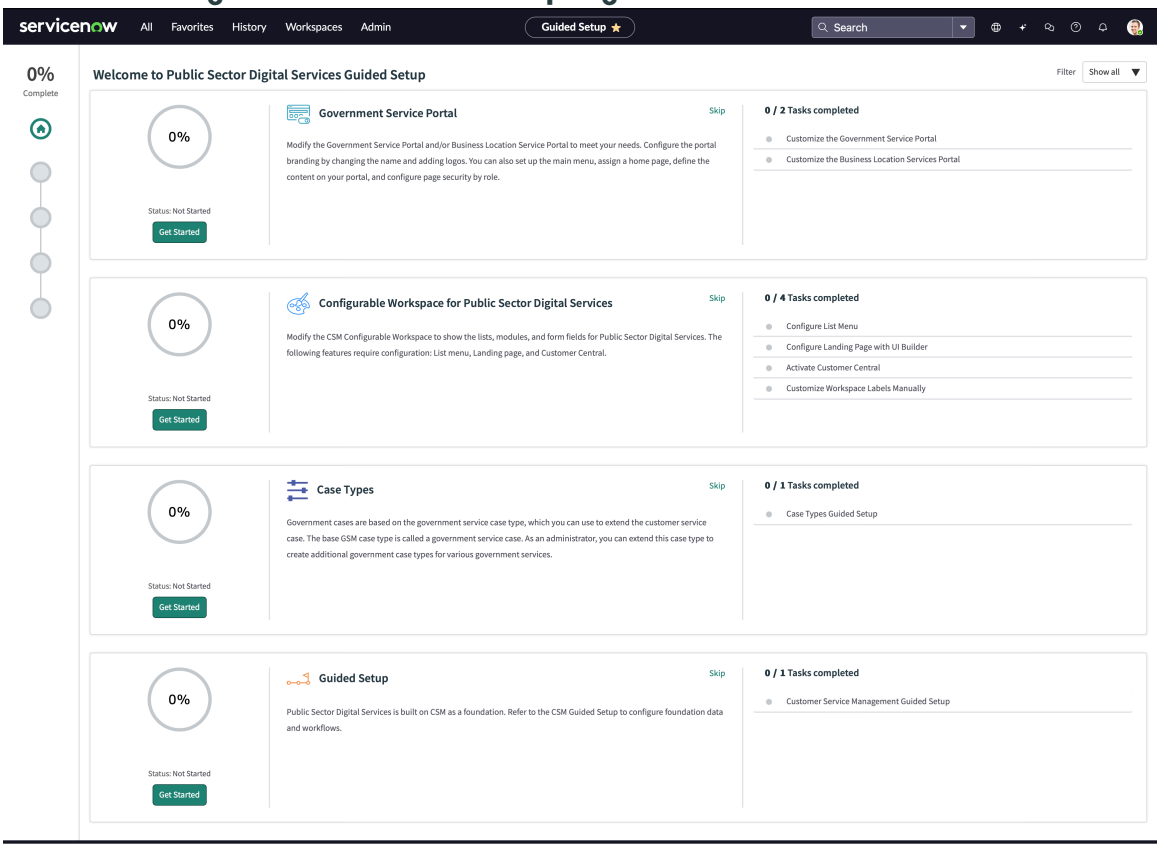
About this task
This script will relabel the "Business Location Details" page within the Business Location Services Portal to "Agency Details". References to "Business Locations" will be changed to "Agencies." The "Install Base" section of the page will be changed to "Items Received." The "Products" section will be removed; there is no equivalent use case of this in Public Sector Digital Services.

Procedure

1. Navigate to **All** > **Constituent Service** > **Administration** > **Guided Setup**.
2. Select **Get Started** to begin configuration.

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Public Sector Digital Services Guided Setup Page



The setup page displays the different categories of configuration tasks to be completed.

3. Select **Get Started** under the Government Service Portal category.
4. Select **Customize the Business Location Services Portal**.
5. Follow the steps to complete the Guided Setup task.

Case Routing in Public Sector Digital Services

Set up Advanced Work Assignment (AWA) to automatically route cases to the appropriate government service agents in CRM Workspace.

Configure Advanced Work Assignment for Public Sector Digital Services

Use the Advanced Work Assignment (AWA) for Public Sector Digital Services feature to automatically assign work items to agents based on their availability, capacity, and skills. AWA for Public Sector Digital Services pushes work to qualified agents using work item queues, routing conditions, and assignment criteria that you define. Agents see their assignments in their Agent Workspace inbox.

Plugins

The Advanced Work Assignment for Public Sector Digital Services feature is available with the Customer Service plugin (com.sn_customerservice).

To use the chat feature with AWA for Public Sector Digital Services, you must also activate the Agent Chat plugin (com.glide.interaction.awa).

For more information, see Activate related plugins for Advanced Work Assignment.

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Inbox layouts

Three chat inbox layouts are included with the Chat service channel.

Chat Layouts and fields on the Chat Service channel

Chat Layout	Included Fields
Default Chat Layout	Short description
Business Contact Chat Layout	Short description, Business, Business Contact, and Case Type
Constituent Chat Layout	Short description, Constituent, Case Type

Two case inbox layouts are included with the Case service channel.

Case Layouts and fields on the Case service channel

Case Layout	Included Fields
Default Case Layout	Short description, Business Contact, Account, Priority, Category
Consumer Case Layout	Short description, Constituent, Case Type

Variable work item sizing

Organizations may like to size cases based on the complexity of the case, time and effort required to complete work. This helps in estimating agent utilization accurately. Advance work assignment currently treats every case as one unit of work. However, sometimes, certain cases may require more work than others. These cases may account for a greater share of an agent's capacity. Work item sizing allows to size the case differently based on the case attributes. For more information, see Service channel capacity and utilization.

Agent affinity

Agent Affinity is an Advanced Work Assignment enhancement that enables you to streamline the routing of work items. Advanced Work Assignment automatically assigns work items based on historical, task-based, or account team affinity. For more information about agent affinity, see Using Agent Affinity.

Related topics

Advanced Work Assignment

Automatically route social benefit requests using Advanced Work Assignment

Use the ServiceNow Advanced Work Assignment (AWA) application to route and assign social benefits requests to designated agents.

The Social Benefits Playbook application provides the following items that are used in AWA to automatically route and assign social benefits requests:

- **Social Benefits Request service channel** - The default service channel for routing incoming public sector social benefits requests to specific government agents. This service channel includes related attributes that define the default conditions for determining the items handled in the channel, work queue associated with agent assignment groups, agent inbox layouts, and more.

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- **Public Sector Social Benefits Request assignment group** - The default assignment group that identifies the agents handling public sector social benefits requests. Agent assignments are based on agent availability, capacity, and skills.
- **Public Sector Social Benefits Requests queue** - The default queue to which public sector social benefits requests are routed.
- **Inbox layouts** - The default card layouts for social benefits request items displayed in the agent inbox view of CRM Workspace:
  - Constituent Social Benefits Layout: Includes **Short description**, **Constituent**, and **Case Type** fields.
  - Business Social Benefits Layout: Includes **Short description**, **Business**, **Business Contact**, and **Case Type** fields.

As an admin, you can enable and disable Advanced Work Assignment for Social Benefits Request cases, as well as change the default attributes for the Social Benefits Requests service channel, such as the related assignment group and queue settings. For details, see Configure Social Benefit Requests service channel.

Configure Social Benefit Requests service channel

Change the default Social Benefit Requests service channel attributes in Advanced Work Assignment to control how public sector social benefit requests are routed and assigned to government agents.

Before you begin

- Activate the Advanced Work Assignment plugin (com.glide.awa).
- Activate the Agent Chat plugin (com.glide.interaction.awa).
- Install the Social Benefits Playbook application.

Role required: admin, awa_admin

About this task

You can modify the context and attributes for service channels in AWA. For the Social Benefit Requests service channel, use the Public Sector Requests assignment group to specify the agents handling social benefit requests. You can also add advanced conditions to filter the routing conditions in the Social Benefit Request service channel, or change queue settings, such as assignment rules.

Procedure

Configure the Social Benefit Requests service channel by modifying the default attributes as needed.

Options	Steps
Enable the Social Benefit Request service channel	**a.** Navigate to **All** > **Advanced Work Assignment** > **Settings Presence States**. **b.** Select the **Available** record. **c.** If prompted, move to the **Global** application to edit the record.

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Options	Steps
	d. In the Presence State form, go to the**Service Channels** field and move the Social Benefit Request channel to the **Selected** column. **e.** Select **Update**.
Add members (agents) to the Public Sector Requests assignment group	**a.** Navigate to **All** > **Advanced Work Assign ment** > **Management** > **Groups**. **b.** Select the Social Benefit Requests group. **c.** In the Group form, navigate to the **Group Members** related list and review the list of example members. Use the examples to determine the govern ment agents, managers, and their associ ated roles to be added to the assignment group. **Note:** Agents and managers added to this assignment group must also have the awa_agent role. **d.** In the **Group Members** related list, click **Edit** to add members to the group. **e.** Select **Edit**. **f.** Select one or more names in the **Collection** list and move them to the **Group Members** list. **g.** Select **Save**.
Configure the Social Benefit Requests queue	**a.** Navigate to **All** > **Advanced Work Assign ment** > **Settings** > **Queues**. **b.** Select the Social Benefit Requests queue. **c.** Change other settings as needed, for exam ple the assignment rule that determines As signment Eligibility. **d.** Select **Update**. For more information on queue settings, see
Change Inbox card layouts for Social Bene fit request items in CSM Configurable Work space	**a.** Navigate to **All** > **Advanced Work Assign ment** > **Service Channels** and select the So cial Benefit Request channel. **b.** Select the **Inbox Layouts** related link.

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Options	Steps
	c. Select the layout and edit the fields to be up dated. **d.** Select **Update**. For more information on changing inbox card layouts, see Create or modify an inbox lay

Automatically route license and permit requests using Advanced Work Assignment

Use the ServiceNow Advanced Work Assignment (AWA) application to route and assign license/permit requests to designated agents.

The License and Permit Playbook application provides the following items that are used in AWA to automatically route and assign license/permit requests:

- **License and Permit Request service channel** - The default service channel for routing incoming public sector license/permit requests to specific government agents. This service channel includes related attributes that define the default conditions for determining the items handled in the channel, work queue associated with agent assignment groups, agent inbox layouts, and more.
- **Public Sector License and Permit Request assignment group** - The default assignment group that identifies the agents handling public sector license/permit requests. Agent assignments are based on agent availability, capacity, and skills.
- **Public Sector License and Permit Requests queue** - The default queue to which public sector license/permit requests are routed.
- **Inbox layouts** - The default card layouts for license/permit request items displayed in the agent inbox view of CRM Workspace:
  - Constituent License/Permit Layout: Includes **Short description**, **Constituent**, and **Case Type** fields.
  - Business License/Permit Layout: Includes **Short description**, **Business**, **Business Contact**, and **Case Type** fields.

As an admin, you can enable and disable Advanced Work Assignment for License/Permit Request cases, as well as change the default attributes for the License/Permit Requests service channel, such as the related assignment group and queue settings. For details, see Configure License and Permits Requests service channel.

Configure License and Permits Requests service channel

Change the default License and Permit Requests service channel attributes in Advanced Work Assignment to control how public sector license and permit requests are routed and assigned to government agents.

Before you begin

- Activate the Advanced Work Assignment plugin (com.glide.awa).
- Activate the Agent Chat plugin (com.glide.interaction.awa).
- Install the License and Permit Request Playbook application.

Role required: awa_admin, admin

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About this task

You can modify the context and attributes for service channels in AWA. For the License and Permit Requests service channel, use the Public Sector Requests assignment group to specify the agents handling license and permit requests. You can also add advanced conditions to filter the routing conditions in the License and Permit Request service channel, or change queue settings, such as assignment rules.

Procedure

Configure the License and Permits Requests service channel by modifying the default attributes as needed.

Options	Steps
Enable the License and Permit Request service channel	**a.** Navigate to **All** > **Advanced Work Assignment** > **Settings Presence States**. **b.** Select the **Available** record. **c.** If prompted, move to the **Global** application to edit the record. **d.** In the Presence State form, go to the**Service Channels** field and move the License and Permit Request channel to the **Selected** column. **e.** Select **Update**.
Add members (agents) to the Public Sector Requests assignment group	**a.** Navigate to **All** > **Advanced Work Assignment** > **Management** > **Groups**. **b.** Select the License and Permits Requests group. **c.** In the Group form, navigate to the **Group Members** related list and review the list of example members. Use the examples to determine the government agents, managers, and their associated roles to be added to the assignment group. **Note:** Agents and managers added to this assignment group must also have the awa_agent role. **d.** In the **Group Members** related list, click **Edit** to add members to the group. **e.** Select **Edit**. **f.** Select one or more names in the **Collection** list and move them to the **Group Members** list. **g.** Select **Save**.

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Options	Steps
Configure the License and Permit Requests queue	**a.** Navigate to **All** > **Advanced Work Assign ment** > **Settings** > **Queues**. **b.** Select the License and Permits Requests queue. **c.** Change other settings as needed, for exam ple the assignment rule that determines As signment Eligibility. **d.** Select **Update**. For more information on queue settings, see
Change Inbox card layouts for License and Permits request items in CSM Configurable Workspace	**a.** Navigate to **All** > **Advanced Work Assign ment** > **Service Channels** and select the Li cense and Permits Request channel. **b.** Select the **Inbox Layouts** related link. **c.** Select the layout and edit the fields to be up dated. **d.** Select **Update**. For more information on changing inbox card layouts, see Create or modify an inbox lay

Automatically route information requests using Advanced Work Assignment

Use the ServiceNow Advanced Work Assignment (AWA) application to route and assign information requests, such as public records requests, to designated agents.

The Information Request Administration application provides the following items that are used in AWA to automatically route and assign public sector information requests:

- **Information Request service channel** - The default service channel for routing incoming public sector information requests to specific government agents. This service channel includes related attributes that define the default conditions for determining the items handled in the channel, work queue associated with agent assignment groups, agent inbox layouts, and more.
- **Public Sector Information Request assignment group** - The default assignment group that identifies the agents handling public sector information requests. Agent assignments are based on agent availability, capacity, and skills.
- **Public Sector Information Requests queue** - The default queue to which public sector information requests are routed.
- **Inbox layouts** - The default card layouts for information request items displayed in the agent inbox view of CRM Workspace:

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- Constituent Information Request layout: Includes **Short description**, **Constituent**, and **Service** fields.
- Business Information Request layout: Includes **Short description**, **Business**, **Business Contact**, and **Service** fields.
- Generic Information Request layout: Includes **Short description** and **Service** fields.

As an admin, you can enable and disable Advanced Work Assignment for Information Request cases, as well as change the default attributes for the Information Requests service channel, such as the related assignment group and queue settings. For details, see Configure Information Requests service channel.

Configure Information Requests service channel

Change the default Information Requests service channel attributes in Advanced Work Assignment to control how public sector information requests are routed and assigned to government agents.

Before you begin

- Activate the Advanced Work Assignment plugin (com.glide.awa).
- Activate the Agent Chat plugin (com.glide.interaction.awa).
- Install the Information Request Playbook application.

Role required: sn_gsm_info_req.admin, awa_admin, admin

About this task

You can modify the context and attributes for service channels in AWA. For the Information Requests service channel, use the Public Sector Requests assignment group to specify the agents handling information requests. You can also add advanced conditions to filter the routing conditions in the Information Request service channel, or change queue settings, such as assignment rules.

Procedure

Configure the Information Requests service channel by modifying the default attributes as needed.

Options	Steps
Enable the Information Request service channel	**a.** Navigate to **All** > **Advanced Work Assignment** > **Settings Presence States**. **b.** Select the **Available** record. **c.** If prompted, move to the **Global** application to edit the record. **d.** In the Presence State form, go to the**Service Channels** field and move the Information Request channel to the **Selected** column. **e.** Select **Update**.
Add members (agents) to the Public Sector Requests assignment group	**a.** Navigate to **All** > **Advanced Work Assignment** > **Management** > **Groups**. **b.** Select the Information Requests group.

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Options	Steps
	c. In the Group form, navigate to the **Group Members** related list and review the list of example members. Use the examples to determine the govern ment agents, managers, and their associ ated roles to be added to the assignment group. **Note:** Agents and managers added to this assignment group must also have the awa_agent role. **d.** In the **Group Members** related list, click **Edit** to add members to the group. **e.** Select **Edit**. **f.** Select one or more names in the **Collection** list and move them to the **Group Members** list. **g.** Select **Save**.
Configure the Information Requests queue	**a.** Navigate to **All** > **Advanced Work Assign ment** > **Settings** > **Queues**. **b.** Select the Information Requests queue. **c.** Change other settings as needed, for exam ple the assignment rule that determines As signment Eligibility. **d.** Select **Update**. For more information on queue settings, see
Change Inbox card layouts for information request items in CSM Configurable Work space	**a.** Navigate to **All** > **Advanced Work Assign ment** > **Service Channels** and select the In formation Request channel. **b.** Select the **Inbox Layouts** related link. **c.** Select the layout and edit the fields to be up dated. **d.** Select **Update**. For more information on changing inbox card layouts, see Create or modify an inbox lay

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Automatically route service requests using Advanced Work Assignment

Use the ServiceNow Advanced Work Assignment (AWA) application to route and assign public sector service requests, such as non-emergency requests, to designated agents.

The Service Request Playbook application provides the following items that are used in AWA to automatically route and assign public sector service requests:

- **Service Requests service channel** - The default service channel for routing incoming public sector service requests to specific government agents. This service channel includes related attributes that define the default conditions for determining the items handled in the channel, work queue associated with agent assignment groups, agent inbox layouts, and more.
- **Public Sector Requests assignment group** - The default assignment group that identifies the agents handling public sector service requests. Agent assignments are based on agent availability, capacity, and skills.
- **Public Service Requests queue** - The default queue to which public sector service requests are routed.
- **Inbox layouts** - The default card layouts for service request items displayed in the agent inbox view of CRM Workspace:
  - Constituent Service Request layout: Includes **Short description**, **Constituent**, and **Service** fields.
  - Business Service Request layout: Includes **Short description**, **Business**, **Business Contact**, and **Service** fields.
  - Generate Service Request Layout: Displayed when anonymous users submit service requests. Includes **Short description** and **Service** fields

As an admin, you can enable and disable Advanced Work Assignment for Service Request cases, as well as change the default attributes for the Service Requests service channel, such as the related assignment group and queue settings. For details, see Configure Service Requests service channel.

Configure Service Requests service channel

Change the default Service Requests service channel attributes in Advanced Work Assignment to control how public sector service requests are routed and assigned to government agents.

Before you begin

- Activate the Advanced Work Assignment plugin (com.glide.awa).
- Activate the Agent Chat plugin (com.glide.interaction.awa).
- Install the Service Request Playbook application.

Role required: awa_admin or admin

About this task

You can modify the context and attributes for service channels in AWA. For the Service Requests service channel, use the Public Sector Requests assignment group to specify the agents handling service requests. You can also add advanced conditions to filter the routing conditions in the Service Request service channel, or change queue settings, such as assignment rules.

Procedure

Configure the Service Requests service channel by modifying the default attributes as needed.

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Options	Steps
Enable the Service Request service channel	**a.** Navigate to **All** > **Advanced Work Assign ment** > **Settings Presence States**. **b.** Select the **Available** record. **c.** In the Presence State form, go to the**Service Channels** field and move the Service Re quest channel to the **Selected** column. **d.** Select **Update**.
Add members (agents) to the Public Sector Requests assignment group	**a.** Navigate to **All** > **Advanced Work Assign ment** > **Management** > **Groups**. **b.** Select the Public Service Requests group. **c.** In the Group form, navigate to the **Group Members** related list and review the list of example members. Use the examples to determine the govern ment agents, managers, and their associ ated roles to be added to the assignment group. **Note:** Agents and managers added to this assignment group must also have the awa_agent role. **d.** In the **Group Members** related list, click **Edit** to add members to the group. **e.** Select **Edit**. **f.** Select one or more names in the **Collection** list and move them to the **Group Members** list. **g.** Select **Save**.
Configure the Public Service Requests queue	**a.** Navigate to **All** > **Advanced Work Assign ment** > **Settings** > **Queues**. **b.** Select the Public Services Requests queue. **c.** Change other settings as needed, for exam ple the assignment rule that determines As signment Eligibility. **d.** Select **Update**. For more information on queue settings, see

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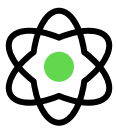
Options	Steps
Change Inbox card layouts for service request items in CSM Configurable Workspace	**a.** Navigate to **All** > **Advanced Work Assignment** > **Service Channels** and select the Service Request channel. **b.** Select the **Inbox Layouts** related link. **c.** Select the layout and edit the fields to be updated. **d.** Select **Update**. For more information on changing inbox card layouts, see Create or modify an inbox lay

Install and configure playbooks and other solutions in Public Sector Digital Services

Install one or more applications available for use with Public Sector Digital Services. You can then configure the features available for submitting requests and routing requests to case agents and other personas.

The following applications are available with Public Sector Digital Services that enable you to create and use playbooks and other solutions as an end-to-end workflow for handling constituent applications and requests. For more information on installing and configuring each application, see the corresponding pages below.

Solutions

Investigative Case Management  Organize, track, and resolve investigations at all levels of government.	**Grants Management**  Handle applications for grants submitted by public sector users.	

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Playbooks

Social Benefits Playbook  Handle applications for social benefit programs.	**License and Permit Playbook**  Handle license and permit requests.	**Information Request Administration**  Handle public record and information requests.
	Service Request Playbook  Handle non-emergency service requests.	

Configuring Urban Planning & Permitting Administration

Install the Urban Planning & Permitting Administration application, which enables investigators and supervisors to initiate and manage land management cases, view the full context of a land management case, and get relevant recommendations.

As a user with the admin role, complete the following configuration tasks to set up Urban Planning & Permitting Administration, after you install the Public Sector Digital Services Core application.

Install Urban Planning & Permitting Administration for Public Sector Digital Services

You can install the Urban Planning & Permitting Administration application if you have the admin role.The application includes demo data and installs related ServiceNow® Store applications and plug-ins if they aren't already installed.

Before you begin

- Ensure that the application and all of its associated ServiceNow Store applications have valid ServiceNow entitlements. For more information, see Get entitlement for a ServiceNow product or application.
- Certain features in the Urban Planning & Permitting Administration application are available based on your ServiceNow entitlements and may require installation of other ServiceNow applications and activation of specific plug-ins.
- Review the Urban Planning & Permitting Administration application listing in the ServiceNow Store for information on dependencies, licensing or subscription requirements, and release compatibility.

Role required: admin

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Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the PSDSUrban Planning & Permitting Administration application using the filter criteria and search bar.

   You can search for the application by its name or ID. If you cannot find the application, you might have to request it from the ServiceNow Store.

   In the list next to the **Install** button, the versions available to you are displayed.
3. Select a version from the list and select **Install**.

   In the Review Installation Details dialog box, any dependencies installed with your application are listed.
4. If you're prompted, follow the links to the ServiceNow Store to get any additional entitlements for dependencies.
5. **Optional:** If demo data is available and you want to install it, select the **Load demo data** check box.
   Demo data are the sample records that describe application features for common use cases. Load the demo data when you first install the application on a development or test instance.
6. Select **Install**.

Configure Urban Planning & Permitting Administration

Configure the foundational details for Urban Planning & Permitting Administration.

Related topics

Assign user personas, roles, groups, and responsibilities in Urban Planning & Permitting Administration

Urban Planning & Permitting Administration Personas

Assign user personas, roles, groups, and responsibilities in Urban Planning & Permitting Administration

By default, Urban Planning & Permitting Administration comes with roles and personas that can be assigned to existing users on the platform.

Assigning user roles

Assign roles to members of your land management organization Urban Planning & Permitting Administration application so that your users can have delegated access to Urban Planning & Permitting Administration features, capabilities, and data.

There are a few guidelines for assigning roles to users:

- Determine who will be working on the urban planning cases for the organization, and what actions each user would be taking on the case. For more information on the roles available in Urban Planning & Permitting Administration and to determine which makes sense for each user, see Roles installed with Public Sector Digital Services and Urban Planning & Permitting Administration Personas.
- Create as many users as needed in your organization.

Role required: admin

To assign roles to a user within an organization:

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1. Make sure a user record has been created within the organization. Navigate to **All** > **User Administration** > **Users** to create a user record, or open an existing user record.
2. In the **Roles** related list, select **Edit**.
3. In the **Collection** list, select the desired roles, and then select **Add**
4. Select **Save**.
5. Repeat as many times as needed until all desired users are added to and associated with the organization and have the desired role.

You can also create user groups and assign roles to them. Users assigned to the group inherit the roles.

Urban Planning & Permitting Administration Personas

Understand the key personas involved in Urban Planning & Permitting Administration and their responsibilities in supporting land management and operations.

Understanding Urban Planning & Permitting Administration personas

Urban Planning & Permitting Administration supports collaboration between multiple personas, each playing a distinct role in managing, delivering, and consuming services. Understanding these roles helps administrators assign the right access, responsibilities, and tools within the framework.

Urban Planning & Permitting Administration supports access based on predefined personas that reflect the type of work users perform within an organization. These personas can be assigned and tailored to match your organization's needs. A persona role may contain several roles within. The roles within are automatically added to the user when the persona role is added.

ICM models this flexibility through:

Personas and Roles

Defined at the user level. Delegates access for the user across the whole organization.

Responsibilities

Defined according to each case, at the case level. Delegates access for the user according to the specific case.

The combination of user roles and responsibilities determines what a user can do within each organization.

Urban Planning & Permitting Administration user personas

A persona role is pre-configured role in the application that is made up of multiple granular roles, and are designed to correspond to common job titles for members of an organization. Each persona role represents a different way a user interacts with an organization or agency. The following table contains the persona roles included with the Urban Planning & Permitting Administration application, and a description of each persona as it may pertain to a land management organization. For more information on the roles installed with Urban Planning & Permitting Administration, including the roles contained in each persona, see Urban Planning & Permitting Administration roles.

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Urban Planning & Permitting Administration user personas

Persona	Description	Organization Example
Admin	An administrator is a certified ServiceNow system administrator of the organization. An administrator doesn't use the application directly, but supports configuration of the organization, hierarchy management, and assignment of member roles and responsibilities, including related-party configurations, as well as user and data management.	Admin
Investigator	An investigator, or case agent, works within an investigative organization to create cases, create reports, set the narrative, and create all the entities and evidence records within the case. A user or group with this role can create and work on investigative cases. An investigator can only view or work on a case within an organization if they have created it, or are added as a team member on that team. If any case tasks are assigned to them, they may work on them.	A detective (or group of detectives) at an investigative organization may submit a case regarding a stolen laptop. They are able to work on the case they submitted, as well as view other cases submitted by other detectives within the organization as long as they are added as a team member. They may also link other detective's cases to theirs, if they have access to that case.
Supervisory Agent	A supervisory agent functions similar to a manager or supervisor, reviewing and approving cases and managing an assignment group of investigators (case agents), for which they have full access to all cases within that group.	An investigator creates a case draft and adds the entities and support information. A supervisory agent, or supervisor, has a checkpoint to make sure all information is correct and logged, and can approve it to proceed. These agents primarily review cases rather submitting them.
Special Agent in Charge	The Special Agent in Charge functions as a director, focusing on the high level, overseeing the department and managing all cases created within their organization. This role allows them to create and fulfill all cases submitted in the organization.	A piece of classified evidence is added to a case, and only the special agent in charge, such as the head detective at an investigative organization, can have access to this evidence.

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Urban Planning & Permitting Administration user personas (continued)

Persona	Description	Organization Example
Expert Analyst	The Expert Analyst is a specialist that helps out with the case. Similar to an investigative contributor, the expert analyst may be brought in for their expertise on a subject. This role allows them to work on any part of the case if they are assigned a case task, as well as add or edit evidence and entity records.	A detective may be brought in from another department and added to the team as an expert analyst. They may work on case tasks if they are assigned to them.
Investigative Fulfiller (Team member)	The Investigative Fulfiller role functions similar to an investigator, but has less access to work on the case. They can view and edit cases to which they have a task assigned to them, and can only view and edit they are added as a team member to. They can view but not add or edit entity or evidence records.	An investigator fulfiller may be brought in from another department to contribute information to the case or complete case tasks. These agents primarily view cases and contribute information related to the case, rather than being assigned to create or work on an entire case. These team members are organization contributors.
Task Agent	The Task Agent is assigned to a case task of the case. They can complete case tasks, and view the details of cases for which they have tasks assigned to them.	At the investigative organization, a desk agent primarily handles administrative work, such as completing case tasks. These team members are organization contributors, and mainly view case information pertaining only to that case task.

Configuring Investigative Case Management

Install the Investigative Case Management application, which enables investigators and supervisors to initiate and manage investigative cases, view the full context of an investigation, and get relevant recommendations.

As a user with the admin role, complete the following configuration tasks to set up Investigative Case Management, after you install the Public Sector Digital Services Core application.

Configuration tasks for Investigative Case Management

Task	Description
Install Investigative Case Management	Install Investigative Case Management (sn_gsm_icm) from the ServiceNow® Store.
Assign user personas, roles, groups, and responsibilities	Assign user persona roles and groups in Investigative Case Management, as well as gain an understanding of user configurations

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Configuration tasks for Investigative Case Management (continued)

Task	Description
	at the case level, such as case teams and responsibilities.
Create a case team for an investigative case	Create a case team to organize a team and delegate access to users at the case level.
Configure the investigative case narrative refinement skill	Configure the ServiceNow Otto for PSDS case narrative refinement generative AI skill that can be used in the Investigative Case Management workspace.
Configure the investigative case summarization skill	Configure the ServiceNow Otto for PSDS case summarization generative AI skill that can be used in the Investigative Case Management workspace.
Configure relationship types for an evidence record	Add or remove the relationship types used to classify the relationship between a piece of evidence and another entity related to the case.
Configure entity types	Configure the entity types that are displayed in the Entity Management tab.
Configure terms and conditions for an ICM chain of custody log	Configure the terms and conditions that are displayed at signature when submitting a chain of custody log entry.
Create a test investigative case	Verify that the newly-configured ICM workspace is working as expected by creating a test investigative case and adding personas and details.

Key capabilities that support the Investigative Case Management Workflows

The main ServiceNow capabilities that are leveraged to support the Investigative Case Management workflows are:

- ServiceNow Otto for Public Sector Digital Services (PSDS)
- CRM Workspace: Provides a process platform for investigators to capture key details and complete key processes.

Install Investigative Case Management for Public Sector Digital Services

You can install the Investigative Case Management application (com.sn_gsm_icm) if you have the admin role.The application includes demo data and installs related ServiceNow® Store applications and plug-ins if they aren't already installed.

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Before you begin

- Ensure that the application and all of its associated ServiceNow Store applications have valid ServiceNow entitlements. For more information, see Get entitlement for a ServiceNow product or application.
- Certain features in the Investigative Case Management application are available based on your ServiceNow entitlements and may require installation of other ServiceNow applications and activation of specific plug-ins.
- Review the Grants Management Playbook application listing in the ServiceNow Store for information on dependencies, licensing or subscription requirements, and release compatibility.

Role required: admin

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the PSDSInvestigative Case Management application (com.sn_gsm_icm) using the filter criteria and search bar.

   You can search for the application by its name or ID. If you cannot find the application, you might have to request it from the ServiceNow Store.

   In the list next to the **Install** button, the versions available to you are displayed.
3. Select a version from the list and select **Install**.

   In the Review Installation Details dialog box, any dependencies installed with your application are listed.
4. If you're prompted, follow the links to the ServiceNow Store to get any additional entitlements for dependencies.
5. **Optional:** If demo data is available and you want to install it, select the **Load demo data** check box.
   Demo data are the sample records that describe application features for common use cases. Load the demo data when you first install the application on a development or test instance.
6. Select **Install**.

Configure Investigative Case Management

Configure the foundational details for Investigative Case Management.

Related topics

Assign user personas, roles, groups, and responsibilities in Investigative Case Management

Investigative Case Management Personas

Configuring Investigative Case Management responsibility definitions

Assign user personas, roles, groups, and responsibilities in Investigative Case Management

By default, Investigative Case Management comes with roles, personas, and responsibilities that can be assigned to existing users on the platform.

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Assigning user roles

Assign roles to members of your investigative organization Investigative Case Management application so that your users can have delegated access to Investigative Case Management features, capabilities, and data.

There are a few guidelines for assigning roles to users:

- Determine who will be working on the investigative cases for the organization, and what actions each user would be taking on the case. For more information on the roles available in Investigative Case Management and to determine which makes sense for each user, see Roles installed with Public Sector Digital Services and Investigative Case Management Personas
- Create as many users as needed in your organization.

Role required: admin

To assign roles to a user within an organization:

1. Make sure a user record has been created within the organization. Navigate to **All** > **User Administration** > **Users** to create a user record, or open an existing user record.
2. In the **Roles** related list, select **Edit**.
3. In the **Collection** list, select the desired roles, and then select **Add**
4. Select **Save**.
5. Repeat as many times as needed until all desired users are added to and associated with the organization and have the desired role.

You can also create user groups and assign roles to them. Users assigned to the group inherit the roles.

Using assignment groups to create organizational teams

There are a few guidelines for creating groups:

- Create one group for administrators and assign the admin role to this group only.
- Create as many groups as needed in your organization. For example, create an investigator group for each supervisory agent team, and a larger investigator group for the investigators for the entire organization, and a group for all the supervisory agents with their manager. Assign the necessary users to those groups, and then assign the necessary role to those groups if you haven't already. You can create groups first, assign a role to the group, and add users, or you can add user roles individually and then add them to the group. All users in a group will inherit the group role.

To delegate access to cases and create organizational teams, you can create assignment groups. This is different from creating case teams at a case level within an investigative case in ICM, where you assign team responsibilities instead of roles. These do not affect roles at the user level. To create a user assignment group:

1. Navigate to **All** > **User Administration** > **Group** to create group record.
2. Select a group **Name**.
3. In the **Group Members** related list, select **Edit**.
4. Select one or more names in the **Collection** list.
5. Select **Add** and **Save**.
6. Repeat as many times as needed until all desired users are added to the group.

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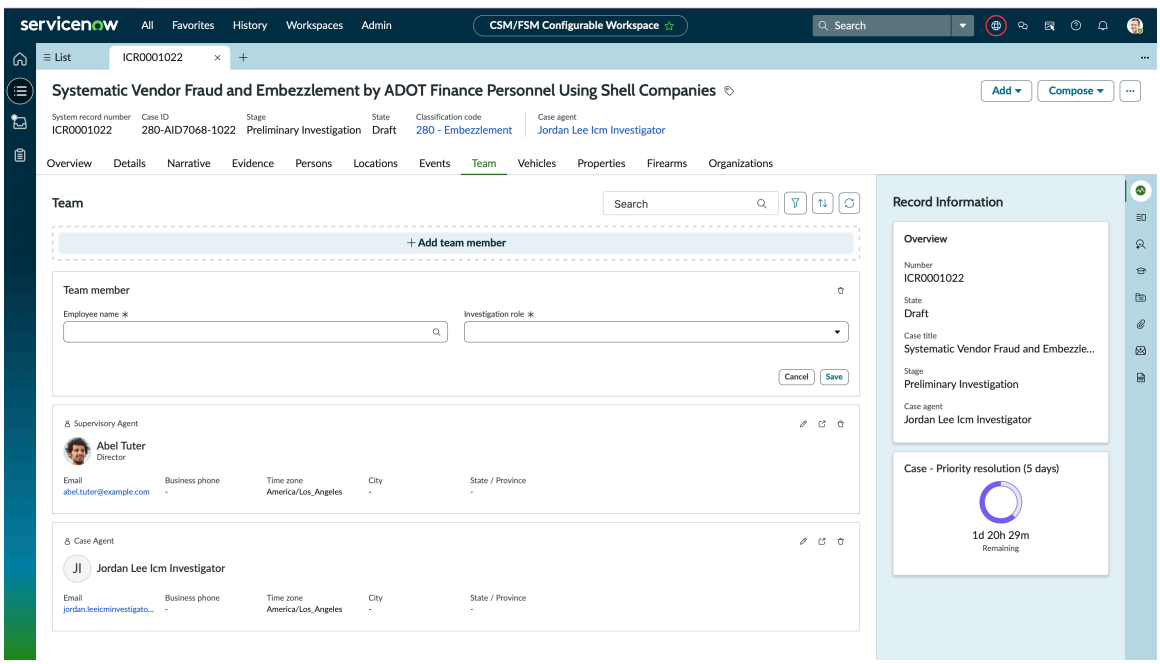
7. In the **Roles** related list, select **Edit**.
8. Add the desired roles to the group.
9. Select **Save**.

For more information on the roles available in Investigative Case Management and to determine which makes sense for each user, see Investigative Case Management roles and Investigative Case Management Personas

Responsibilities

The following is a list of all responsibilities that are provided with the Investigative Case Management application by default. Responsibility definitions can be used to build teams of users in the Teams tab within the Investigative Case Management workspace. You can assign these using the dropdown menus on the Teams tab. For information on creating case teams, see Create a case team for an investigative case

Responsibilities are different than user roles; responsibilities are tied to the case only and determined at the case level. These can only be assigned once a case has been created. A user can have multiple responsibilities across cases, per case, and a user's responsibility within a case does not affect a user role.



The following is a list of all responsibility definitions that are provided with the Investigative Case Management application by default. Responsibility definitions can be added and removed as needed using the responsibility definition table. For information on how to configure responsibility definitions, see Configuring Investigative Case Management responsibility definitions.

Responsibility table (Case Level)

Responsibility	
Case Agent	
Coroners Office Liason	
Crime Lab Technician	

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Responsibility table (Case Level) (continued)

Responsibility	
District Attorney	
Expert Analyst	
Internal Affairs Officer	
Investigative Assistant	
Special Agent in Charge	
Supervisory Agent	

Configure Case Access for Office and Assignment Groups

Use the x_snc_icm.case_write_access and x_snc_icm.case_read_access system properties to extend write access and restrict read access to cases based on Assigned Office, Assignment Group, or both, to allow automatic case access alignment with organizational units without manual Teams tab management, preserving existing access pathways and role-based permissions.

x_snc_icm.case_write_access

Value	Label	Behavior
0	Default	No change. Case write access remains governed by existing access pathways.
1	Assignment Group	Extends write access to members of the case's Assignment Group.
2	Assigned Office	Extends write access to users that match the case's Assigned Office.
3	Assignment Group & Assigned Office	Extends write access to users that match either condition.

x_snc_icm.case_read_access

Value	Label	Behavior
0	Default	No change. Case read access remains open to all users with the appropriate platform roles.
1	Assignment Group	Restricts case read access to members of the case's Assignment Group.
2	Assigned Office	Restricts case read access to users that match the case's Assigned Office.
3	Assignment Group & Assigned Office	Restricts case read access to users that match either condition.

Investigative Case Management Personas

Understand the key personas involved in Investigative Case Management and their responsibilities in supporting investigations and operations.

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Understanding Investigative Case Management personas

Investigative Case Management supports collaboration between multiple personas, each playing a distinct role in managing, delivering, and consuming services. Understanding these roles helps administrators assign the right access, responsibilities, and tools within the framework.

Investigative Case Management (ICM) supports access based on predefined personas that reflect the type of work users perform within an organization. These personas can be assigned and tailored to match your organization's needs. A persona role may contain several roles within. The roles within are automatically added to the user when the persona role is added.

ICM models this flexibility through:

Personas and Roles

Defined at the user level. Delegates access for the user across the whole organization.

Responsibilities

Defined according to each case, at the case level. Delegates access for the user according to the specific case.

The combination of user roles and responsibilities determines what a user can do within each organization. For information on configuring role responsibilities, see Configuring Investigative Case Management responsibility definitions.

Investigative Case Management user personas

A persona role is pre-configured role in the application that is made up of multiple granular roles, and are designed to correspond to common job titles for members of an organization. Each persona role represents a different way a user interacts with an organization . The following table contains the persona roles included with the Investigative Case Management, and a description of each persona as it may pertain to a investigative organization. For more information on the roles installed with Investigative Case Management, including the roles contained in each persona, see Investigative Case Management roles.

Investigative Case Management user personas

Persona	Description	Organization Example
Admin	An administrator is a certified ServiceNow system administrator of the organization. An administrator doesn't use the application directly, but supports configuration of the organization, hierarchy management, and assignment of member roles and responsibilities, including related-party configurations, as well as user and data management.	Admin
Investigator	An investigator, or case agent, works within an investigative organization to create cases, create reports, set the	A detective (or group of detectives) at an investigative organization may submit a case regarding a stolen

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Investigative Case Management user personas (continued)

Persona	Description	Organization Example
	narrative, and create all the entities and evidence records within the case. A user or group with this role can create and work on investigative cases. An investigator can only view or work on a case within an organization if they have created it, or are added as a team member on that team. If any case tasks are assigned to them, they may work on them.	laptop. They are able to work on the case they submitted, as well as view other cases submitted by other detectives within the organization as long as they are added as a team member. They may also link other detective's cases to theirs, if they have access to that case.
Supervisory Agent	A supervisory agent functions similar to a manager or supervisor, reviewing and approving cases and managing an assignment group of investigators (case agents), for which they have full access to all cases within that group. For more information on how to create an assignment group, see Assign user personas, roles, groups, and responsibilities in Investigative Case Management.	An investigator creates a case draft and adds the entities and support information. A supervisory agent, or supervisor, has a checkpoint to make sure all information is correct and logged, and can approve it to proceed. These agents primarily review cases rather submitting them.
Special Agent in Charge	The Special Agent in Charge functions as a director, focusing on the high level, overseeing the department and managing all cases created within their organization. This role allows them to create and fulfill all cases submitted in the organization.	A piece of classified evidence is added to a case, and only the special agent in charge, such as the head detective at an investigative organization, can have access to this evidence.
Expert Analyst	The Expert Analyst is a specialist that helps out with the case. Similar to an investigative contributor, the expert analyst may be brought in for their expertise on a subject. This role allows them to work on any part of the case if they are assigned a case task, as well as add or edit evidence and entity records.	A detective may be brought in from another department and added to the team as an expert analyst. They may work on case tasks if they are assigned to them.

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Investigative Case Management user personas (continued)

Persona	Description	Organization Example
Investigative Fulfiller (Team member)	The Investigative Fulfiller role functions similar to an investigator, but has less access to work on the case. They can view and edit cases to which they have a task assigned to them, and can only view and edit they are added as a team member to. They can view but not add or edit entity or evidence records.	An investigator fulfiller may be brought in from another department to contribute information to the case or complete case tasks. These agents primarily view cases and contribute information related to the case, rather than being assigned to create or work on an entire case. These team members are organization contributors.
Task Agent	The Task Agent is assigned to a case task of the case. They can complete case tasks, and view the details of cases for which they have tasks assigned to them.	At the investigative organization, a desk agent primarily handles administrative work, such as completing case tasks. These team members are organization contributors, and mainly view case information pertaining only to that case task.

Configuring Investigative Case Management responsibility definitions

Configure responsibilities within a case, such as Crime Lab Technician, that can be assigned to users at the case level.

Before you begin

Role required: admin

About this task

A responsibility, or responsibility definition, specifies the role or function a user has within an entity or organization, determining access through relationships. When creating a relationship, users are assigned specific responsibilities that grant access to the entity and its related entities. In Investigative Case Management, responsibility definitions are used to delegate case access to team members working on an investigative case in the ICM workspace.

You can use the responsibility definitions provided with the Investigative Case Management application to create teams. By default, Investigative Case Management comes with the following responsibility definitions that can be assigned within the case.

Responsibility table (Case Level)

Responsibility	
Case Agent	
Coroners Office Liaison	
Crime Lab Technician	
District Attorney	

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Responsibility table (Case Level) (continued)

Responsibility	
Expert Analyst	
Internal Affairs Officer	
Investigative Assistant	
Special Agent in Charge	
Supervisory Agent	

For information on the responsibilities provided with ICM, see Assign user personas, roles, groups, and responsibilities in Investigative Case Management.

As an admin, you can also modify these role responsibility definitions or create your own to meet your organization requirements and match common team member responsibilities within your investigations.

About this task

Note: If you modify the existing definitions or create definitions, you must update access control lists (ACLs) to reflect the changes.

Procedure

1. Navigate to **All** > **Customer Service** > **Administration** > **Responsibility Definitions**, or enter `sn_customerservice_responsibility_def.list` in the navigation filter.
2. Select **New**.
3. On the form, fill in the fields.

Responsibility Definition form fields

Field	Definition
Name	Name of the responsibility. For example, Probation Officer.
Type	Type of users to whom the responsibility can be assigned to. Select **User** if this responsibility should be assigned to an employee or user within the organization. When assigning this type, the list of available users comes from the users [sys_users] table.
Unique	Option that you can select to disable the duplicate entries for the responsibility definition. Leave this box unchecked.

4. Select **Submit**.
   The new responsibility definition is created, and can be used to create teams at the case level within the investigative case record. To assign a responsibility to a team member within a case, see Create a case team for an investigative case.

Configure Investigative Case Management Case Workspace

Configuring case workspace data for Investigative Case Management.

Create a case team for an investigative case

You can add existing users within your investigative organization to the case and assign them a responsibility. Responsibilities determine a users relationship to the case, at the case level.

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Before you begin

Note: Creating case teams and assigning responsibilities is distinct from creating user groups and assigning roles. Case teams are created at the case level only, and do not affect roles or groups at the user level. For more information on roles, case teams, and responsibilities, see Assign user personas, roles, groups, and responsibilities in Investigative Case Management. To create a case team, you must either create a case, or a case must already have been created within the workspace.

Role required: icm.investigator, admin

Procedure

1. Navigate to the CRM Workspace and select **My active cases**.
   Alternatively, you can select a case using the CRM Workspace Lists menu by selecting **Lists** > **Investigative Cases** > **All** and selecting the case.
2. Select the case you wish to create a case team for.
3. Select the **Team** tab.
4. Select **Add Team Member**.
5. Select the User from the dropdown.
   If you do not see the desired User's name, have an admin verify that a user record has been created for them on the organization level. For more info on assigning users, see Assign user personas, roles, groups, and responsibilities in Investigative Case Management.
6. Select their case-level responsibility from the **Investigation role** dropdown.
   Multiple team members can have the same responsibility, but only one team member with the Case Agent responsibility can be created.
7. Select **Save**.
8. Repeat these steps as needed until you have added all your desired team members to the case.

Result

A case team is now created for the open investigation, and team members now have the necessary access to begin working on the case.

Email notifications for the Investigative Case Type

Email notifications are automatically triggered by the Investigative Case Management. In Public Sector Digital Services, notifications can result from an agent action, a response needed from an agent or constituent, or from an update on a case status.

Email notifications in the Investigative Case Management workspace are automatically sent to the investigator (case agent) when:

- A case is assigned to the agent.
- The assigned to field is modified.
- The case has been inactive for 10 days.

Configure Investigative Case Management Entity Management

Configure settings related to Entity Management in Investigative Case Management, such as adding or modifying entity display categories.

Related topics

Configure entity types in the Investigative Case Management Entity Management workspace

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Configure entity types in the Investigative Case Management Entity Management workspace

Configure the entity type tabs that are displayed in the Entity Management workspace. After you create or modify an entity type, investigators and supervisors can select and add the required entity type through the case form.

About this task

By default, Investigative Case Management contains the following entity types:

- Persons
- Locations
- Events
- Vehicles
- Properties
- Firearms
- Organizations

As an admin, you can add and configure entity types that are displayed in the Entity Management workspace of an investigative case, to create additional labels that more closely align with the types of entities your team regularly handles for investigative cases.

Before you begin

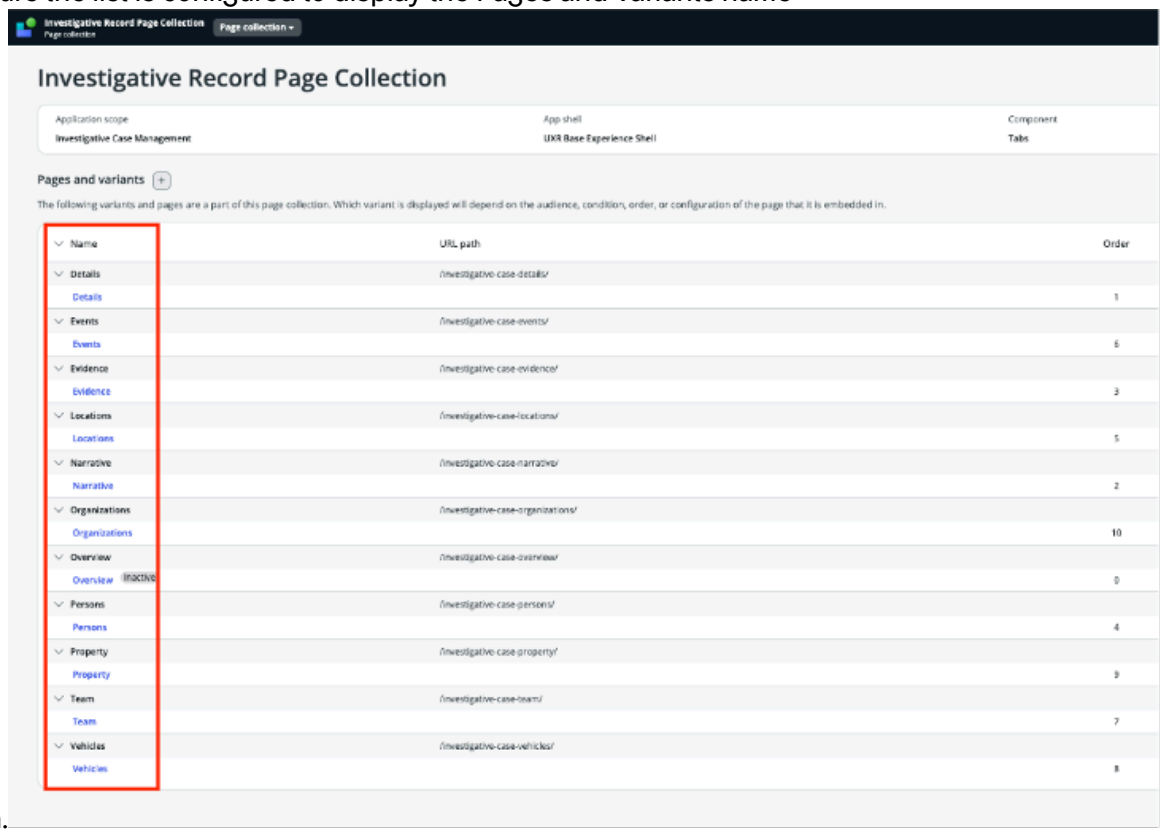
Role required: admin

Procedure

1. Navigate to **All** > **Now Experience Framework** > **UI Builder**.
   UI Builder will open in a separate tab.
2. In UI Builder, select **Page collections**.
3. Select and open the **Investigative Record Page Collection**.

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Make sure the list is configured to display the Pages and Variants name column.



4. If prompted, select **Edit in original scope**.
5. Select the name of the entity you wish to configure.

   To add a new one, select the add (⊕) icon.
6. In the content panel, select **Body** > **Generic List – ICM**.
7. In the Configure panel for the `Generic List – ICM`, select the dropdown for **Card Configuration Section**.
8. Select **Entity Page Header**, and enter the desired name for the Entity page.
9. If necessary, update the core table that this entity record maps to by selecting *`[Entity Type]`* **Core Table**, and entering the desired table in the field.
10. Select **Save**.

Result

A new entity type table has now been created and is displayed in the Entity Management case workspace alongside existing types. You can add new entities under this table configuration, and link them to existing entities of other categories.

What to do next

Add an entity to the case using this configuration. For more information on adding an entity to a case, see Add entities to an investigative case using Investigative Case Management Entity Management.

Configure information completeness rules for entity types in Investigative Case Management

Configure the rules for record completeness for each entity type.

About this task

While most entity record fields are not mandatory, each entity record contains a completeness field that tracks whether the record has sufficient data to be searchable within ICM. These

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rules outline the minimum amount of information required for each entity record type to be considered complete. These rules are configurable by an admin, and you can modify which fields are required to be filled in for an entity record to become searchable.

For more information on the default completeness rules for ICM entities, see Completeness Rules by Investigative Case Management Entity Type.

Before you begin

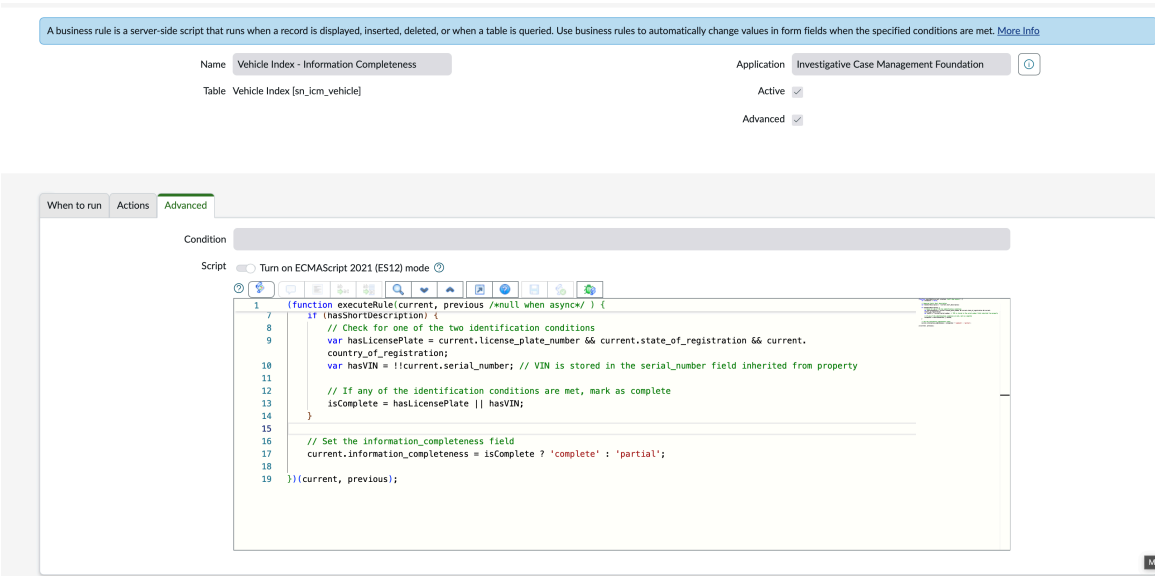
Role required: admin

Set the scope to Investigative Case Management Foundation.

Note: Direct edits are flagged as customizations and can be overwritten on upgrade. Capture changes in an Update Set and note the sys_id before editing.

Procedure

1. Navigate to **All** > **System Definition** > **Business Rules**.
2. Filter the list to include only items from the Investigative Case Management Foundation application.
3. Select the information completeness business rule of the entity for which you want to edit.
4. Select **Advanced**.
5. Edit the script, adding or removing fields as needed under the **Check for one of the two identification conditions**, and **If any of the identification conditions are met, mark as complete** line items.



6. Once you are finished editing the record, select **Update**.

Result

The entity completeness fields have now been modified, and the entity record will now appear in a case dropdown menu when the modified criteria is met.

Configure relationship types for an entity record in Investigative Case Management

As an admin, you can add or remove relationship types used to classify the relationship between two entities in a case.

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About this task
For more information about relating entities to a case, see Add entities to an investigative case.

Before you begin
Role required: admin

Procedure
1. Navigate to **All** > **Task Relationships** > **Relationship Types**.
2. Select **New**.
3. On the form, fill in the fields.
4. Select **Submit**.

Result
The relationship type definition is now created, and will display in the relationship type dropdown menu when an investigator moves to associate an entity to a case, or an entity to an entity.

What to do next
An investigator can use this relationship type to define the relationship between an entity record and a case, or between two entities. For more information on how to link entities to a case, see Associate and link evidence to entities. For more information on how to link entities to each other, see Associate and link multiple entities.

Configure link analysis for entity records in Investigative Case Management

As an admin, you can set up link analysis used to visualize the relationship between multiple components of a case.

About this task
Link Analysis is a shared, prebuilt graph visualization component that lives in the `sn-configurable-comps` plugin, that renders an interactive node/edge graph, per-node info cards, node taglines, status chips, and search — for any ServiceNow table. Use this plugin in Investigative Case Management to visualize the relationships between multiple entities, evidence, tasks, and related cases as an interactive knowledge graph, surfacing hidden connections and blind spots.

An interactive knowledge graph renders all entities, evidence, tasks, and related cases; blue dotted lines show direct case relationships and gray solid lines show entity-to-entity links. Any node can be set as the home node to instantly re-map the network, and the view exports to PDF or PowerPoint for case reviews and handoffs.

Before you begin
Before you begin, verify that

- The `com.sn-configurable-comps` (scope `sn_config_comps`) plugin is installed on your instance.
- You have a "home" table, the record that users will view when they open the graph (e.g., the case table)
- You have entity tables configured, and have linked the tables that connect them

Role required: admin

Procedure
1. Navigate to **All** > **Task Relationships** > **Relationship Types** to define your graph ID.

   Pick a unique string that identifies your graph. This does not need to be a real sys_id.

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For example, if you choose `myapp-case-graph` as your graph id, ICM will use the sys_id of its sys_meta_graph record.

Note: This string is the `graphSysId` that scopes your entire configuration. Two teams using the same `graphSysId` will automatically merge their configurations into one graph.

2. Create a Script Include in your app scope that extends `sn_config_comps.NodeMapConfigProvider`.

```
var MyAppNodeMapConfigProvider = Class.create();
MyAppNodeMapConfigProvider.prototype = Object.extendsObject(
    sn_config_comps.NodeMapConfigProvider,
    {
        MY_GRAPH_ID: 'myapp-case-graph',

        getConfig: function(graphSysId) {
            // CRITICAL: Guard on graphSysId
            if (graphSysId !== this.MY_GRAPH_ID) {
                return { nodeTypes: {}, relationships: [],
 directRelationships: [] };
            }

            return {
                nodeTypes: { /* ... */ },
                relationships: [ /* ... */ ],
                directRelationships: [ /* ... */ ],
                iconMap: { /* ... */ },
                defaultIcon: 'gear-fill',
                captionConfig: { /* ... */ },
                statusColorMap: { /* ... */ },
                statusConfig: { /* ... */ },
                edgeLabelConfig: { /* ... */ },
            };
        },

        type: 'MyAppNodeMapConfigProvider'
    }
);
```

Note: The `graphSysId` guard (the "if" at the top) must be included. Without it, your nodes will inject into every graph on the instance.

3. Define node types with one entry per logical node type.
Each entry describes one kind of node on your graph.

```
nodeTypes: {
    myapp_case: {
        tables: ['myapp_case'],
        baseTable: 'myapp_case',
        primaryLabelField: 'short_description',
        secondaryLabelField: 'state',
        secondaryLabelFallbackText: 'Case',
        iconMap: { myapp_case: 'folder-outline' },
        colorMap: { myapp_case: 'blue' },
        cardHeadings: { myapp_case: 'short_description' },
```

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```
        fieldConfig: {
            assigned_to: { label: 'Assigned to', valueType:
 'text-link' },
            priority: { label: 'Priority' },
        },
    },
    myapp_person: {
        tables: ['myapp_person'],
        baseTable: 'myapp_person',
        primaryLabelField: 'name',
        secondaryLabelFallbackText: 'Person',
        iconMap: { myapp_person: 'user-outline' },
        colorMap: { myapp_person: 'green' },
        cardHeadings: { myapp_person: 'name' },
        fieldConfig: {
            email: { label: 'Email', valueType: 'text-link' },
            phone: { label: 'Phone' },
        },
    },
},
```

4. Define the relationships between entities via a many-to-many via join table.

```
relationships: [
    {
        table: 'myapp_case_person_link',    // the join/link
 table
        label: 'Related to',
        a: { col: 'case', type: 'myapp_case' },       // column
 referencing source
        b: { col: 'person', type: 'myapp_person' },    //
 column referencing target
    },
],
```

Note: If your link table is shared across multiple parent records (for example, if every case uses the same link table), add the following **scopeField** and **scopeType** values to prevent cross-record edge leaks:

- rel.scopeField = `case`
- rel.scopeType = `myapp_case`

5. Define the directRelationships via an FK.

```
directRelationships: [
    {
        fromType: 'myapp_task',
        toType: 'myapp_case',
        fkField: 'parent_case',    // FK column on myapp_task
 pointing at myapp_case
        label: 'Belongs to',
    },
],
```

6. Define the top-level visual configuration.

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```
// Node bubble icons (filled variants)
iconMap: {
    myapp_case: 'folder-fill',
    myapp_person: 'user-fill',
    myapp_task: 'clipboard-check-fill',
},
defaultIcon: 'gear-fill',

// Card captions
captionConfig: {
    myapp_case: { field: 'number' },
    myapp_person: { field: 'role', fallbackText: 'Person' },
},

// Status chips
statusConfig: {
    myapp_person: { field: 'status' },
},
statusColorMap: {
    myapp_person: {
        1: { name: 'Active', color: 'positive', icon:
 'activity-fill' },
        2: { name: 'Inactive', color: 'low', icon:
 'ban-outline' },
    },
},

// Edge labels
edgeLabelConfig: {
    default: { field: 'relationship_type' },
},
```

7.

Result

The link analysis is now set up, and the relationship between each entity can be viewed with a graph.

Configure Investigative Case Management Evidence Management

Configure settings related to Evidence Management, such as modifying evidence security classification levels, or configuring relationship types for an evidence record.

Related topics

Configure relationship types for an evidence record in Investigative Case Management

Modify case classification codes

Create and modify case classification codes and titles to organize and categorize the investigation types your agency handles.

About this task

When you select a classification code for a case, you can use the pre-defined case type classifications, or create your own. By default, the workspace provides the following generic classification titles and codes that correspond to different investigative case types:

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- 13A, Aggravated Assault
- 23H, All Other Larceny
- 290, Destruction of Property
- 90D, Driving Under Influence
- 35A, Drug/Narcotic Violations
- 280, Embezzlement
- 26B, Fraud - Credit Card/ATM
- 26A, Fraud - False Pretenses
- 26C, Fraud - Impersonation
- 26F, Identity Theft
- 23D, Larceny - From Building
- 23A, Larceny - Pocket-picking
- 23B, Larceny - Purse-snatching
- 23C, Larceny - Shoplifting
- 90F, Weapon Law Violations

You can modify these existing classification codes into custom ones that more closely correspond to that of your investigative organization, or you can create new ones.

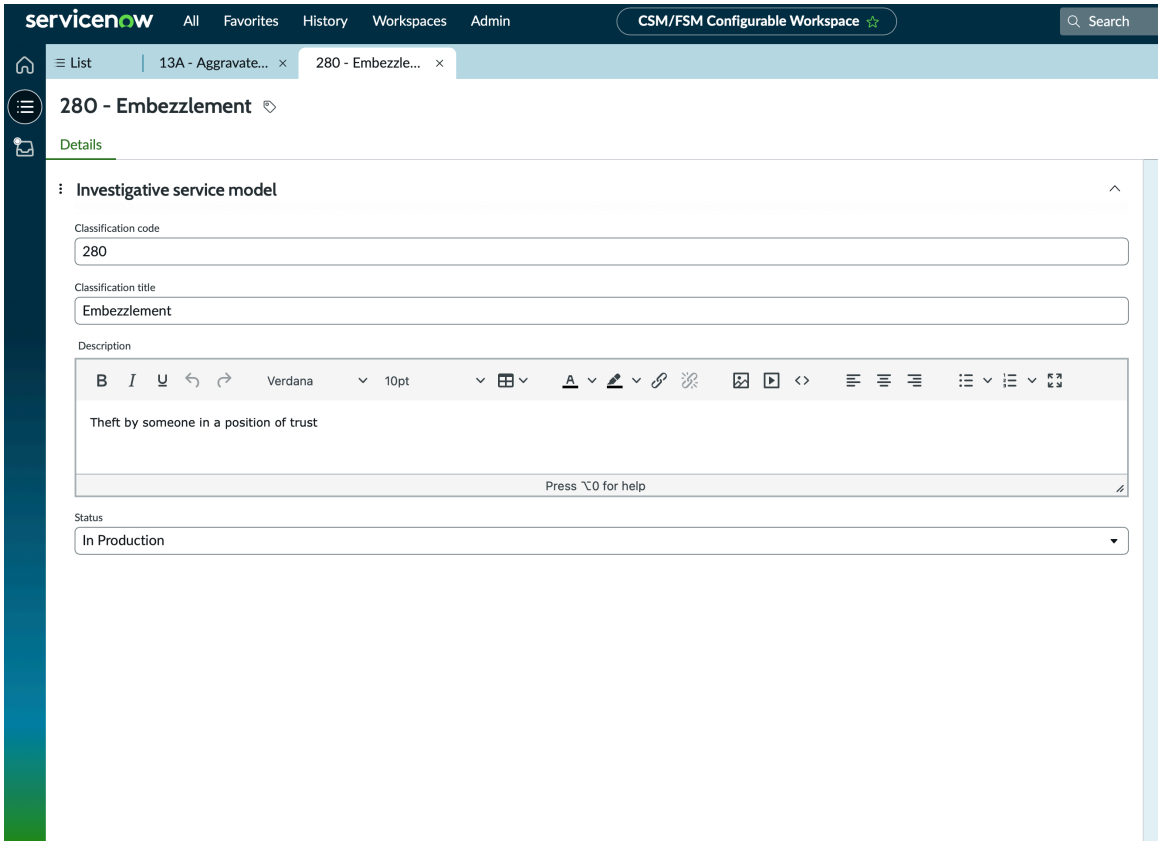
Before you begin

Role required: admin

Procedure

1. Navigate to the CRM Workspace and select **Investigative Classifications** > **All**.
2. Select the classification title you want to edit, or select **New**.
3. On the form, fill in or update the fields with the desired classification code and title.

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4. Select **Save**.

Result
The updated classification code or title should now appear in the dropdown menu when an investigator creates a new case.

Configure relationship types for an evidence record in Investigative Case Management

As an admin, you can add or remove the relationship types used to classify the relationship between a piece of evidence and another entity related to the case.

About this task
For more information about relating entities to a case, see Associate and link evidence to entities.

Before you begin
Role required: admin

Procedure
1. Navigate to **All** > **Task Relationships** > **Relationship Types**.
2. Select **New**.
3. On the form, fill in the fields.
4. Select **Submit**.

Result
The relationship type definition is now created, and will display in the relationship type dropdown menu when an investigator associates an evidence record to an entity within a case.

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What to do next

An investigator can use this relationship type to define the relationship between an evidence record and an entity. For more information on how to link evidence to an entity, see Associate and link evidence to entities.

Configure terms and conditions for sign and submit in Investigative Case Management

Configure the terms and conditions that are displayed when investigators are asked to provide a signature before submitting a chain of custody log entry.

About this task

Create or modify point in time content, such as terms and conditions, so that you can provide investigators an opportunity to make attestations before signing the chain of custody log form. Terms and conditions information is stored in the table.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **Constituent Service** > **Point in Time Content**.
2. Select **New**.
3. On the form, fill in the fields.
4. Right select the header to open the context menu, then select **Save**.
5. Select **Publish**, then select **Update**.

Configuring Grants Management

Install the Grants Management application, which enables users to submit and track grants management requests and provides government agents with a predefined process for handling and resolving these requests. You can then configure the features available for submitting requests and routing requests to agents.

As a user with the admin role, complete the following configuration tasks to set up Grants Management, after you install the Public Sector Digital Services Core application.

Configuration tasks for Grants Management

Task	Description
Install Grants Management for Public Sector Digital Services	Install Grants Management from the ServiceNow® Store.
Configure scripted extension points in Grants Management	Enable publishing of grant programs, as well as authorized representative activities.
Configure Restricted Caller Access (RCA) for Document Templates	Allow secure, controlled access for generating results letters.
Assign user personas, roles, groups, and responsibilities in Grants Management	Assign roles to members of your grants organization Grants Management application so that your users can have delegated access to Grants Management features, capabilities, and data.
Configure PaCE Eligibility Framework Engine for use with Grants Management	Configure the eligibility framework engine, powered by PaCE, to allow agents to confirm

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Configuration tasks for Grants Management (continued)

Task	Description
	whether an applicant is eligible for the specific grant being requested.
Configure the Reviewer Service Portal	Configure the Grants Management Reviewer Service Portal for merit reviewers to track, score, and review grants proposals.
Set up a grant program in Grants Management	Set up and configure the details of a new grant program using Grants Management.
Create a test grant program and grant proposal	Verify the newly-configured grant program setup and grant proposal playbooks are working as expected by creating a new grant program and test grant proposal using the Grants Management.

Key capabilities that support the Grants Management Workflows

The main ServiceNow capabilities that are leveraged to support the Grants Management workflows are:

- Document Processor: Manage internal docs with version control, security, & workflow integration. Request and verify docs from applicants.
- Playbooks: Provide a visual, step-by-step guide for applicants and agents to complete key processes.
- Policy as Code Engine (PaCE) : Streamline the creation, maintenance, and use of screening criteria with a low-code rules engine.
- Configurable Portal Widgets: Use pre-built UI components for easy portal set up and modification.
- Smart Assessment: Improve the creation and maintenance of application questions.
- Decision Trees: Provide a structured, step-by-step approach for pre-screening potential applicants.

Install Grants Management for Public Sector Digital Services

You can install the Grants Management application (com.sn.gsm_grants) if you have the admin role.The application includes demo data and installs related ServiceNow® Store applications and plug-ins if they aren't already installed.

Before you begin

- Ensure that the application and all of its associated ServiceNow Store applications have valid ServiceNow entitlements. For more information, see Get entitlement for a ServiceNow product or application .
- Certain features in the Grants Management application are available based on your ServiceNow entitlements and may require installation of other ServiceNow applications and activation of specific plug-ins.

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Note: Install the Playbooks for Customer Service Management application to enable the playbook experience.

- Review the Grants Management Playbook application listing in the ServiceNow Store for information on dependencies, licensing or subscription requirements, and release compatibility.

Role required: admin

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the Grants Management application (sn_gsm_grnt_mgmt) using the filter criteria and search bar.

   You can search for the application by its name or ID. If you cannot find the application, you might have to request it from the ServiceNow Store.

   In the list next to the **Install** button, the versions available to you are displayed.
3. Select a version from the list and select **Install**.

   In the Review Installation Details dialog box, any dependencies installed with your application are listed.
4. If you're prompted, follow the links to the ServiceNow Store to get any additional entitlements for dependencies.
5. **Optional:** If demo data is available and you want to install it, select the **Load demo data** check box.
   Demo data are the sample records that describe application features for common use cases. Load the demo data when you first install the application on a development or test instance.
6. Select **Install**.

Configure Grants Management

Configure the foundational details of Grants Management.

Configure scripted extension points in Grants Management

Enable publishing of grant programs and authorized representative activities.

Before you begin

Role required: admin

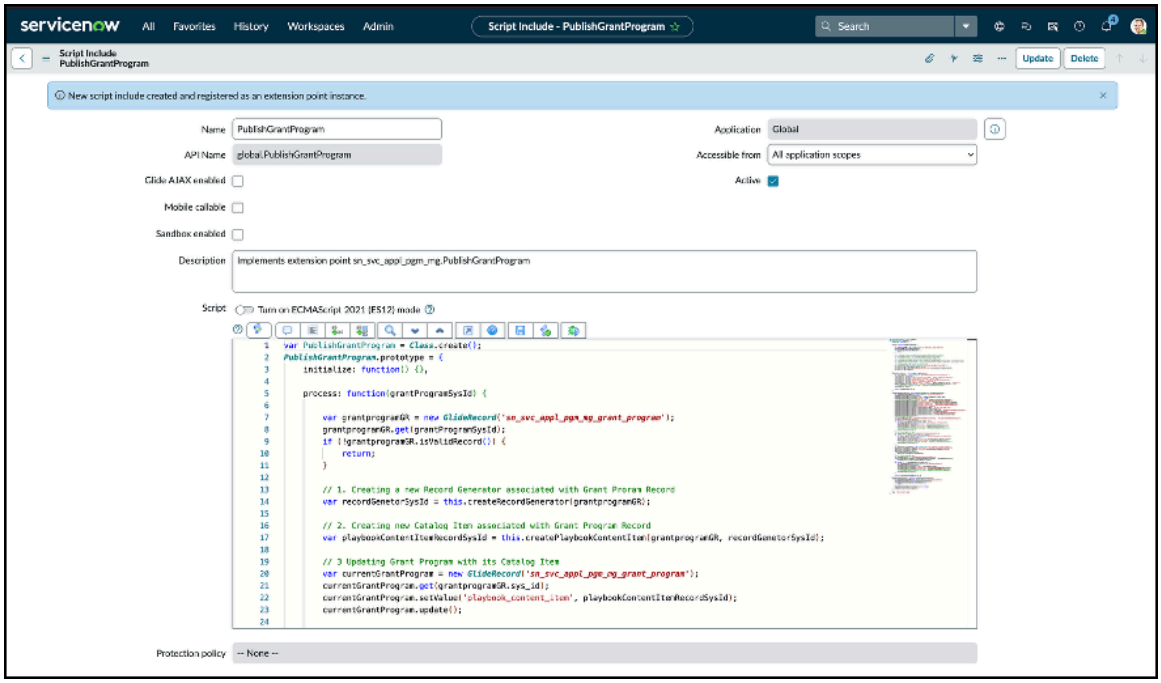
Note: Verify your application scope is set to **Global** by selecting the application picker (🌐) in the Unified Navigation bar and selecting **Application Scope** > **Global**.

Procedure

1. Navigate to **All** > **Scripted Extension Points** > **Scripted Extension Points**.
2. In the API name column, search for `sn_svc_appl_pgm_mg.PublishGrantProgram` and select the record.
3. Under Related Links, select **Create Implementation**.

   The system creates and registers a new Script Include as an extension point instance.

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4. In the dropdown next to **Accessible from** field, select **All application scopes**.
5. Select **Update**.
6. Verify the implementation by publishing a grant program and confirming it moves to the **Accepting Applications** state.
   If you're creating a custom playbook, perform these additional steps to make sure you reference the intended playbook definition:

   a. Open the intended playbook definition record and copy its `sys_id` from the record header menu or the record URL.

   b. On the extension point implementation, set the **process_definition** field to that `sys_id`.
   If the field is not on the form, add it by using form layout, or edit it from the record list.

   c. Select **Update**.

   d. Reopen the proposal and confirm the activity now appears.

   The activity list on a proposal is resolved from the playbook definition referenced in `process_definition`. If it points to a different playbook, such as the base-system proposal playbook, activities that exist only in the intended playbook don't display.

Result

The publishing extension point is implemented. Grant programs and authorized representative activities can now be published. Publishing a grant program moves it to the Accepting Applications state and makes it available to contacts for proposals.

Configure Restricted Caller Access (RCA) for Document Templates

Allow secure, controlled access for generating results letters.

Before you begin

Role required: admin

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Note: Set the application scope to **Document Templates** by selecting the application picker ( ) in the Unified Navigation bar, then **Application Scope** > **Document Templates**. The default scope is Global.

Procedure

1. Navigate to **All** > **System Applications** > **Application Restricted Caller Access**.
2. Select **New**.
3. On the form, fill in the fields with the following information.

Document Template Restricted Caller Access Privilege form

Field	Entry
Source Scope	Grants Management Playbook
Source Type	Script Include
Source	GrantManagementUtilImpl
Status	Allowed
Target Scope	Document Templates
Target Type	Table
Target	Table: HTML Template
Operation	Read

4. Select **Submit**.
5. Select **New**.
6. On the form, fill in the fields with the following information.

Document Template Restricted Caller Access Privilege form

Field	Entry
Source Scope	Grants Management Playbook
Source Type	Script Include
Source	GrantManagementUtilImpl
Status	Allowed
Target Scope	Document Templates
Target Type	Script Include
Target	Script Include: HtmlTemplateUtils
Operation	Execute API

7. Select **Submit**.

Result

RCA access for Document Templates has now been configured.

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What to do next

You can now set up the grant program.

Assign user personas, roles, groups, and responsibilities in Grants Management

By default, Grants Management comes with roles, personas, and responsibilities that can be assigned to existing users on the platform.

Assigning user roles

Assign roles to members of your grants organization Grants Management application so that your users can have delegated access to Grants Management features, capabilities, and data.

There are a few guidelines when assigning roles to users:

- Determine the roles who would be working on the grant cases for the agency, and what user would do what. For more information on the roles available in Grants Management and to determine which makes sense for each user, see Grants Management roles and Grants Management Personas
- Create as many users as needed in your organization.

Role required: admin

To assign roles to a user within an organization:

1. Make sure a user record has been created within the organization. Navigate to **All** > **User Administration** > **Users** to create a user record, or open an existing user record.
2. In the **Roles** related list, select **Edit**.
3. In the **Collection** list, select the desired roles, and then select **Add**
4. Select **Save**.
5. Repeat as many times as needed until all desired users are added to and associated with the organization and have the desired role.

You can also create user groups and assign roles to them. Users assigned to the group inherit the roles.

Using assignment groups to create organizational teams

There are a few guidelines for creating groups:

- Create one group for administrators and assign the admin role to this group only.
- Create as many groups as needed in your organization. Assign the necessary users to those groups, and then assign the necessary role to those groups if you haven't already. You can create groups first, assign a role to the group, and add users, or you can add user roles individually and then add them to the group. All users in a group will inherit the group role.

To delegate access to grants programs and create organizational teams, you can create assignment groups. This is different from creating internal program teams within a grant program in Grants Management. These are responsibilities that are assigned at the grant program level within the playbook, and adding a user to either of these grant program-level groups do not affect roles at the user and agency level. For information on how to create an internal program team and external reviewer group, see Add members to a Grant Program internal program team and Add external reviewer groups in Grants Management.

To create a user assignment group:

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1. Navigate to **All** > **User Administration** > **Group** to create group record.
2. Select a group **Name**.
3. In the **Group Members** related list, select **Edit**.
4. Select one or more names in the **Collection** list.
5. Select **Add** and **Save**.
6. Repeat as many times as needed until all desired users are added to the group.
7. In the **Roles** related list, select **Edit**.
8. Add the desired roles to the group.
9. Select **Save**.

For more information on the roles available in Grants Management and to determine which makes sense for each user, see Grants Management roles and Grants Management Personas

Internal Program Team Responsibilities

The following is a list of all internal program team responsibilities that are provided with the Grants Management application by default. You can assign these using the dropdown menus in the Internal Program team activity of the playbook. For information on creating internal program teams, see Add members to a Grant Program internal program team

Program team responsibilities are different than user roles; responsibilities are tied to the grant program only and determined at the grant program case level. These can only be assigned once a program has been created. A user can have multiple responsibilities across grant programs, per program, and a user's responsibility within a program does not affect a user role.

The following is a list of all internal program team responsibilities that are provided with the Grants Management application by default.

- Approver
- Collaborator
- Observer
- Program Lead
- Program Co-lead

Grants Management Personas

Understand the key personas involved in Grants Management and their responsibilities in supporting grants.

Understanding Grants Management personas

Grants Management supports collaboration between multiple personas, each playing a distinct role in managing, delivering, and consuming services. Understanding these roles helps administrators assign the right access, responsibilities, and tools within the framework.

Grants Management supports access based on predefined personas that reflect the type of work users perform within an agency. These personas can be assigned and tailored to match your agency's needs. A persona role may contain several roles within. The roles within are automatically added to the user when the persona role is added.

Grants Management models this flexibility through:

Personas and Roles

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Defined at the user level. Delegates access for the user across the entire agency.

Responsibilities

Defined according to each grant program, at the grant program level only. Delegates access for the user according to the specific grant program. A user can be a point of contact for a grants program, part of the internal program team, or part of the external merit reviewer team. All of these are added at the grant program level, through activities in the program setup playbook.

The combination of user roles and responsibilities determines what a user can do within each grants agency, and within each grant program.

Grants Management user personas

A persona role is a pre-configured role made up of multiple granular roles. Persona roles correspond to common job titles for agency members, and each represents a different way a user interacts with an agency. The following table contains the persona roles included with the Grants Management, and a description of each persona as it applies to an agency. For more information on the roles installed with Grants Management, including the roles contained in each persona, see Grants Management roles.

Grants Management user personas

Persona	Description	Agency Example
Admin [sn_svc_appl_pgm_mg.grant_program_admin] [sn_gsm_grnt_mgmt.grant_admin]	An administrator is a certified ServiceNow system administrator of the agency. An administrator doesn't use the application directly. This role supports agency configuration, instance management, and hierarchy management. It also covers assignment of member roles and responsibilities, including related-party configurations and general data management.	A system administrator sets up the agency's Servicenow environment, and manages all instances. A Grant Program admin has access to all grant programs within an agency, and can create, edit, or remove grant programs.
Grant Program Director [sn_svc_appl_pgm_mg.grant_program_director] [pps_resource]	The Grant Program Director provides oversight and final approval for program setup and funding decisions. They ensure the program aligns with agency goals, compliance requirements, and available funding. The Grant Program Director serves as the senior authority responsible for the strategic oversight and governance of the grant program. This role involves approving final program configurations, ensuring compliance with organizational policies,	Review and approve program configuration before publication. Approve or decline funding recommendations submitted by the Program Manager. Provide strategic direction and ensure program compliance. Oversee program performance and outcomes.

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Grants Management user personas (continued)

Persona	Description	Agency Example
	and making key decisions regarding program direction and resource allocation. The Director reviews and authorizes the publication of opportunities, working closely with the Grant Program Manager to verify that all requirements and standards are met. Additionally, the Director provides guidance on complex issues, helps resolve escalations, and maintains accountability for the program's overall success.	
Grant Program Manager [sn_svc_appl_pgm_mg.grant_program_manager] [pps_resource]	The Grant Program Manager is the primary owner of the grant program. This role oversees the full lifecycle, from initial definition through announcement, application configuration, and final publication. They design, configure, and maintain the program throughout its lifecycle. This includes defining eligibility criteria, review frameworks, budget structures, milestones, and required documentation. They also oversee application intake, screening, evaluation, and funding recommendations.	Define program details, eligibility rules, milestones, and budget parameters. Configure application forms, screening logic, and review workflows. Assign reviewers and manage merit review tasks. Monitor evaluation progress and consolidate scoring. Build funding proposals and submit recommendations for approval. Communicate with applicants as needed throughout the process. They are focused on compliance, success, and transparency, and are handling everything from document management, monitoring, reporting and understanding outcomes of a grant program. This role involves setting up program parameters, managing timelines and budgets, selecting review frameworks, and forming implementation teams. The manager ensures that all information and requirements are correctly configured and communicated, facilitating a transparent and efficient application process. Additionally, the Grant Program Manager coordinates with key stakeholders, reviews

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Grants Management user personas (continued)

Persona	Description	Agency Example
		program setups, and seeks necessary approvals before publishing opportunities.
Merit (External) Reviewer [awa_agent], [sn_gsm_grnt_mgmt.external_reviewer]	Merit Reviewers are subject matter experts (SMEs) assigned to evaluate proposals based on predefined scoring rubrics. They may be internal staff, external partners, or community reviewers depending on the program. These users are added to the grant program's external reviewer team using the activity in the playbook.	A merit reviewer is brought in to conduct merit reviews using structured scoring rubrics that have been pre-defined by the grant agency. The reviewer will evaluate proposals for technical quality, feasibility, and alignment with program goals, and submit scores, comments, and recommendations within assigned deadlines. They may participate in panel discussions if required.
Applicant [sn_customerservice.customer] or [sn_gsm.business_contact]	The Grant Applicant represents an organization or business seeking funding through the grant program. This persona is responsible for preparing and submitting the application, including providing detailed organizational information, responding to eligibility screening, and assembling required documents such as budget plans and proposal narratives. They must be registered users on the portal. **Note:** The applicant must be a registered user in the Grants Management Applicant Portal, and must have either the `sn_customerservice.customer` or `sn_gsm.business_contact` roles.	Applicants work through the Grant Applicant Portal to review program requirements, meet compliance mandates, and submit their application. They collaborate internally to gather required data and signatures, and serve as the main point of contact for communications with the Grant Program Manager.
Grant Program Writer	A grant program viewer can edit grant programs that they are assigned to.	

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Grants Management user personas (continued)

Persona	Description	Agency Example
Grant Program Viewer	A grant program viewer can view grant programs that they are assigned to.	

Configure read/write access roles for the Grants Management internal program team

In a Grant Program, certain access is granted to each Internal Program Team user on a case-by-case basis. As an admin, you can delegate read/write access to users within internal teams by mapping specific roles to read/write access.

About this task

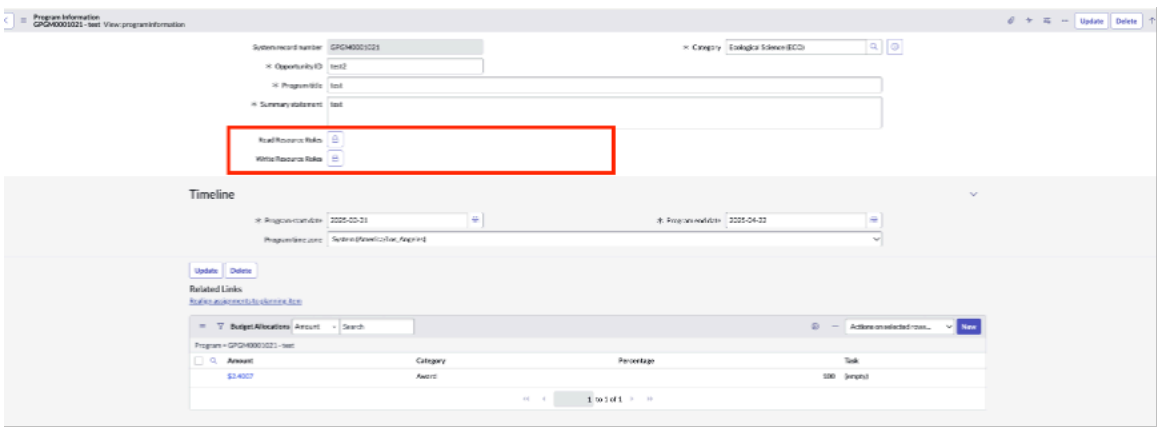
By default, users with the Observer and Approver roles within a grant program have read-only access to the grant program. Users with the Program Lead, Co-Lead, and Collaborator roles have read and write access to the entire grant program. To update the access configurations for the aforementioned personas:

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **Grant Program** > **All**.
2. Open the Grant Program Record for which you want to configure read/write access roles.
3. Select the context menu, then select **Configure** > **Form Layout**.
4. Select and add **Read Resource Roles** and **Write Resource Roles** to the program information form.
5. Select **Save**.
6. Select the lock icon to add roles to the Read or Write access fields.



7. Add roles under the **Read Resource Roles** field to grant read access to those roles, and roles under the **Write Resource Roles** fields to grant write access to those roles.
8. Select **Update**.
   Users with these roles now have read access to program or read/write access to the grant program.

Toggle character count display for form fields in Grants Management

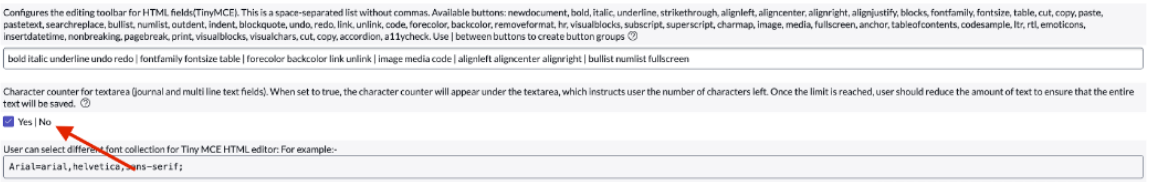
Toggle the character count for form fields in the Grants Management to display the remaining number of characters available in the text field.

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Before you begin
Role required: admin

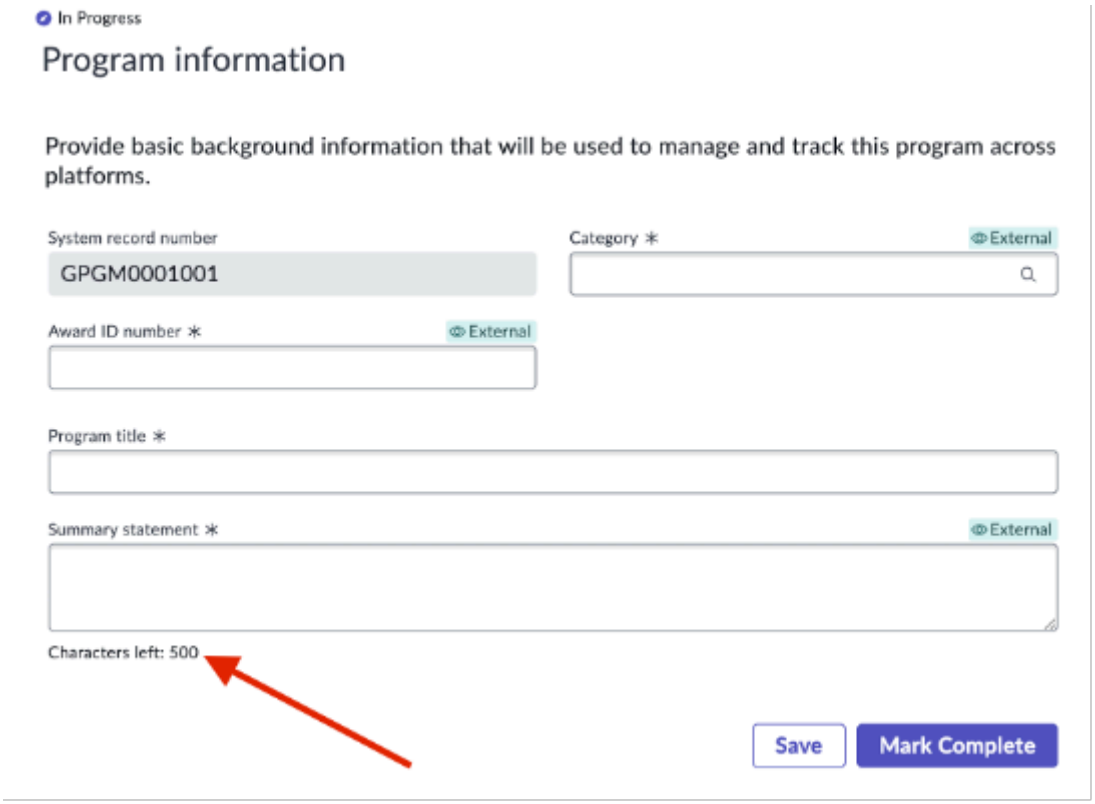
Procedure

1. Navigate to **All** > **System Properties** > **UI Properties**.
2. Select **Character counter for text area (journal and multi line text fields)**.



When this property is set to true, the character counter will appear under the text area, displaying the remaining number of characters available in the text field. Once the character limit is reached, the entire text may not be saved.

3. Navigate to a playbook form activity and verify that the character counter is visible.



The character count is visible under the text area.

Configure a retention policy for grant cases in Grants Management

Set up an Archive Rule to automatically purge active grant cases and their associated data after a set period of time.

Before you begin
Role required: admin

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Procedure

1. Navigate to **All** > **System Archiving** > **Archive Rules**.
2. Select the **Archive Grant Cases after 3 years** record.
   A retention rule that checks for cases created 3 years ago AND are Closed is enabled by default.
3. Modify the conditions you wish to change based on your agency's retention rule requirements. You can add an additional condition, such as adding a condition to ignore Records being Audited, to the retention rule using any of the fields from the Grant Case table.
4. Under Related links, select **Recalculate Archive Estimate** to calculate archive estimate of the records before running the rule.
   The estimate will populate in the Record Estimate field.
5. Run the Archive Rule by selecting **Run Archive Now**.

Result

All cases that match your retention criteria are now purged from the primary table to an archive table.

Configure a currency in Grants Management

Grants Management currently only supports single-currency mode.

About this task

Without this configuration, if a grant applicant uses a different currency from the program it applies to, and it will result in incorrect currency calculation like budget calculation.

Before you begin

Role required: admin

Note: This may have configuration implications across all ServiceNow applications in your instance. Verify the RCA settings of other applications after completing this procedure.

Procedure

1. Navigate to **All**, and in the navigation filter, enter `sys_properties.list`.
2. Under the Name column, search for the `glide.i18n.single_currency` record, and select the record to open it.
3. Set the value to **true**.
4. Navigate to **All**, and in the navigation filter, enter `sys_properties.list`.
5. Under the Name column, search for **glide.i18n.single_currency.code**, and select the property record to open it.
6. In the Value field, enter the three-letter ISO currency code for the target currency.
   For example, to set the currency to USD, enter USD.
7. Navigate to **All**, and in the navigation filter, enter `sys_properties.list`.
8. Search for `glide.system.locale`, and open the property record.
9. Set the value the desired locale for the currency.
   The value is in the format `Language.Country`, where the Language is an ISO 639 language code, and Country is an ISO 3166 language code. To set the locale to the US, enter `en.US`.
10. Navigate to **All** > **System Localization** > **Currencies**.
11. Open the record of each currency that you wish to deselect, and unselect the checkbox for **Active**.

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Configure export application functionality in Grants Management

Configure the export to PDF functionality so that grants program can export grants proposals directly to PDF.

About this task

The export application function generates a PDF format of the confirm application details involving the information from all the sections from the intake stage in sectional formatting.

PDF export functionality uses the Document Templates table and a script to generate a PDF. However, these reside in different scopes, requiring RCA records to be created and manually allowed.

Before you begin

Role required: admin

Verify that the scope is set to **Document Templates**.

Note: This may have configuration implications across all ServiceNow applications in your instance. Verify the RCA settings of other applications after completing this procedure.

Procedure

1. Navigate to **System Application** > **Application Restricted Caller Access Privileges**
2. Open the **Read** operation record and change the value of Status field to **Allowed**.
3. In the Confirm Application Details activity, select **Export**.
4. Open the **Execute API** operation record and change the value of Status field to **Allowed**.

Result

The export PDF functionality should appear in the Confirm Application Details activity of the playbook.

What to do next

The data that shows up in the exported PDF is generated based on a pre-configured document template. This configuration can be modified to add/delete fields, change formatting of the document, and more.

Configure PaCE Eligibility Framework Engine for use with Grants Management

Configure the eligibility framework engine, powered by PaCE, to allow agents to confirm whether an applicant is eligible for the specific grant being requested.

Configure pre-eligibility questions in Grants Management

The Grants Management Program Setup enables grant program managers to use decision trees to define a series of pre-eligibility questions to check if the applicants qualify for the program.

Before you begin

Role required: sn_svc_appl_pgm_mg.grant_program_manager, sn_gsm_grnt_mgmt.grant_admin, admin

The Grants Management incorporates the use of pre-eligibility criteria, a series of questions that may be posed to an applicant to determine whether they are eligible to apply for a grant. The purpose is to deflect proposals in which the applicant is not eligible to obtain a grant.

The Eligibility & Screening activity allows the user to either select an existing decision tree or create a new decision tree with a series of pre-eligibility questions to check if the applicants qualify for the program. Note: there can only be one decision tree per Grant Program.

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You can configure the pre-eligibility questionnaire in one of two ways:

- By navigating directly to the **Decision Tree (ga_decision_tree)** table and following steps to create a new decision tree
- Through the **Eligibility and screening** activity during the Grant Program creation process, where you are provided with the option to either:
  - Select a decision tree that an admin has already created by selecting the search icon in the Decision tree field, or
  - Create a new decision tree by selecting **Open the Decision Trees list**. Here, you can configure a new decision tree and define the associated pre-eligibility questions.

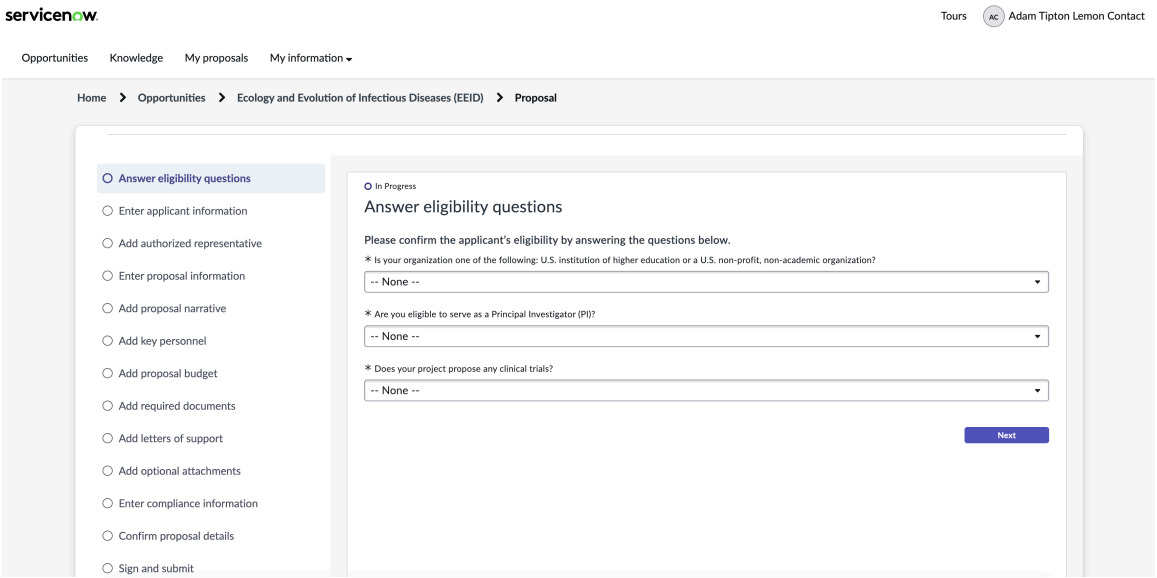
To configure the Pre-Eligibility questions for a new Grant Program using a decision tree:

Procedure

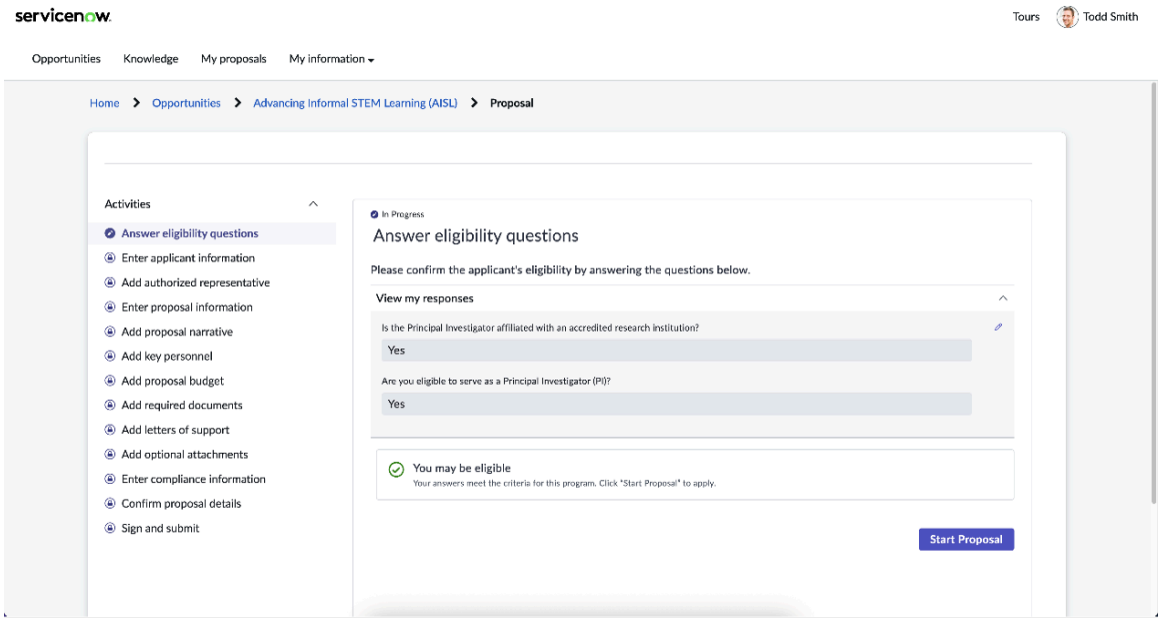
1. Set the scope to **Grants Management Playbook**.
2. In the Decision Tree (ga_decision_tree) table, select **New** to open a new Decision Tree record form where you can define the details of your decision tree.
3. On the form, fill in the fields.
4. Unselect the checkbox next to **Show a dismiss button**.
5. Select **Submit** to create the decision tree record.
6. Select **Open in Builder** to open the Decision Tree builder, where you can add questions, define branching logic, and set eligibility criteria.
7. Select the **New** node and enter the Node name, then select the relevant reference table. Enter `PreEligibility` as the Node name, and select Grants Management Case as the reference table.
8. Select **Add question** and enter the desired Question.
9. Select **Choice** in the Type of answer field, and provide options `Yes` and `No`.
10. Select **Save and Close**.
11. Select the **+** icon below the Pre-Eligibility node to add a new path and node.
12. Select **New Path** to define a branching path from the Pre-Eligibility node. This will be the Eligible Path.
13. Select **Submit** to save the new decision tree.
14. Set the Path name to **Eligible Path**.
15. Define the conditions by selecting the questions and entering their answers.
16. Select **Save and close** to save the path configuration.
17. Select **Add node** under the Eligible Path, then select **Propose a guidance as an outcome**, then select **Continue**.
18. Set the Node name to **Eligible**, and set the guidance as **Grants Pre-Eligibility**.
19. Select the check box next to **Eligible**, then select **Save and close**.
20. Set the Guidance for **Non-Eligible Path** and enter the Node name as **Not Eligible**.
21. Select **Grants Pre-Eligibility** under Guidance, and unselect the checkbox for **Eligible**.
22. Select **Save and Close**.
23. Select **Activate** to publish the decision tree for use within the Grant Program.

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Result

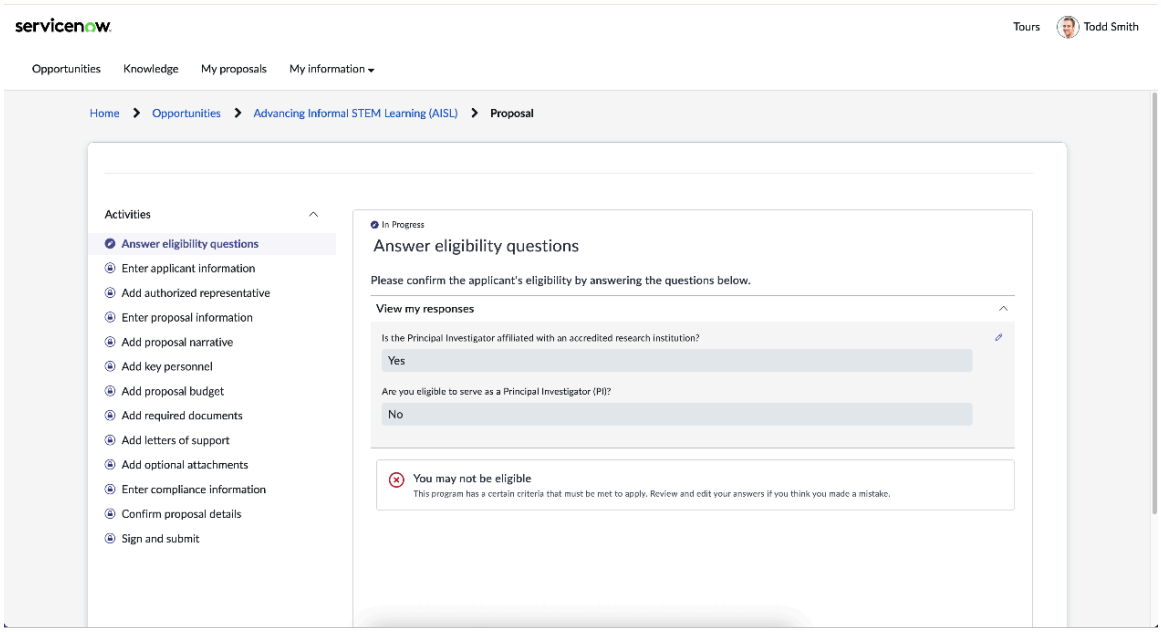


When applicants proceed to answer eligibility questions, they are presented with the questionnaire that you have just created using the decision tree. Based on their responses:



- If eligible, they will see a success message and the option to proceed with their proposal.

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If not eligible, a message will indicate that they may not be eligible and suggest reviewing their answer.

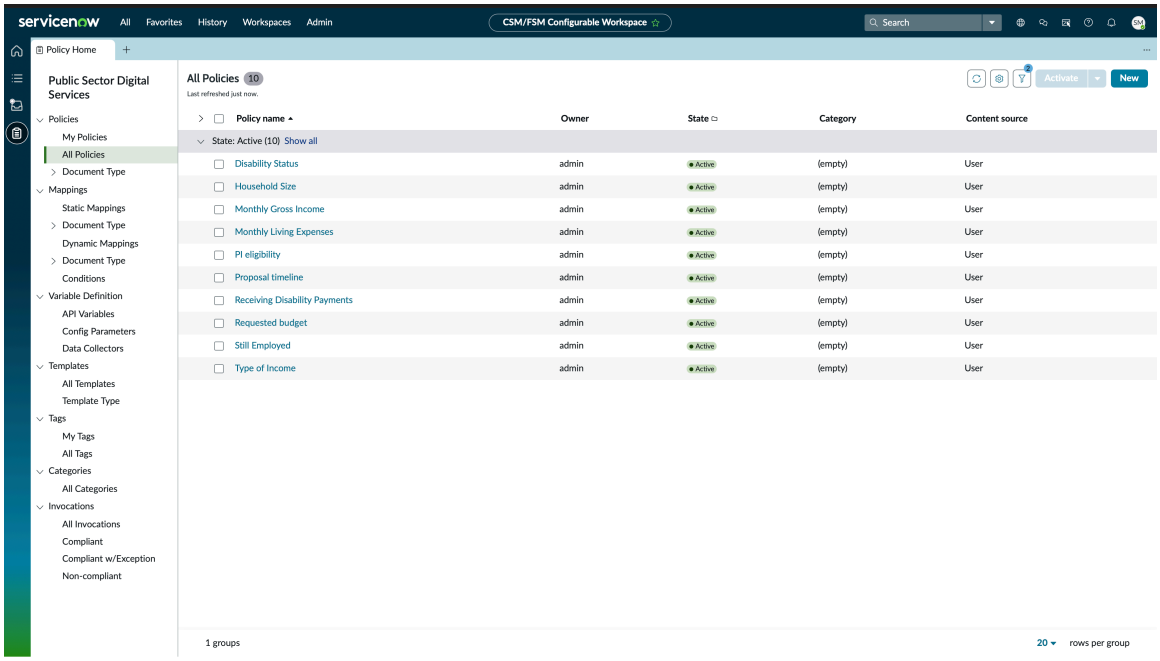
Configure Eligibility Rules Engine Policies in Grants Management

Use the Grants Management Eligibility Rules Engine, powered by Policy as Code Engine (PaCE), to manage the life cycle of a policy and create, update, review, and execute policies.

Agencies administering grants management programs must ensure that applicants meet certain eligibility conditions before receiving a grant. With the Grants Management Eligibility Framework, agencies can apply a low code approach to eligibility rule creation and management. This enables agencies to manage a variety of rules, from simple to complex, across multiple programs and with ease.

Define and manage your eligibility rules engine policies in a single management console, the Policy Management Home in CRM Workspace. In the Policy Home of the CRM Workspace, you can create, remove, and update the policies used for determining eligibility for an application routed through the Grants Management workspace.

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PaCE is a scalable workspace that allows you to set up the foundational elements of the Public Sector Eligibility Framework, use data collectors to create complex policies, save policies as a template to make future policy creation easier, and use config parameters to create reusable policies that can be applied across multiple grant programs.

Here, you can:

- Create policies.
- Review existing policies.
- Assess and implement changes to each policy.
- Determine if a policy should be used as the template for another policy.
- Understand why a policy may not be working as expected.

You can create any number of policies, which can be updated as required.

Create a case API Variable for a PaCE policy in Grants Management

Create a case API variable to transfer the information collected from the case to the PaCE eligibility rules engine. This will be used when creating a policy and referencing fields on the case.

About this task

An API Variable is a variable that enables you to pass the value to the policy whenever the policy is invoked. Specify a value for this API Variable when calling the API, otherwise the policy is not executed and no decision is reached.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **Workspaces** > *`CRM Workspace`*.
2. From the CRM Workspace sidebar, navigate to the **Policy Home**.
3. Select the **API Variables** list.

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4. Select **Add** to create an API variable.
5. On the form, fill in the fields with the following information.

UI parameter element mapping form

Field	Value
Label	Case Reference
Name	case_reference
Type	Reference
Description	Case Reference
Table	Grants Table
Match Criteria	Select first match

6. Select **Save**.

Result
An API variable is created, and will pass the value to the policy whenever the policy is invoked, after which the policy is executed and a decision is reached.

What to do next
Create a data collector for a PaCE policy.

Related topics
Create a case data collector for a PaCE policy in Grants Management

Create a case data collector for a PaCE policy in Grants Management

Create a data collector within PaCE to use a set of data within a policy.

About this task
Data collectors collect input process data from within your organization or from a provided external data source to provide an output that can be used in the policy logic to make a decision. This will be used when creating a policy and referencing fields that must be calculated or cannot be dot walked from the case. You can define and manage data collectors by creating, editing, updating, and activating them to your policy builder.

Before you begin
Role required: admin

Procedure
1. Navigate to **All** > **Workspaces** > *CRM Workspace*.
2. From the CRM Workspace sidebar, navigate to the **Policy Home**.
3. In the Variable Definition list, select the **Data Collectors** list.
4. Select **New** to create a data collector.
5. Enter the name of the data collector and a description, then select **Save**.
6. Select **Save**.
7. Select the **Versions (1)** related list, and select **Draft-V0.1**.
8. Select the **Build** tab.

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9. Under Define Variables, select **Add** to add an input variable.
10. On the form, fill in the fields with the following information.

Define Variables input form

Field	Value
Label	Label of the input variable.
Name	The name of the output variable used within the data collector script.
Type	The input variable data type. This can be reference, string, int.
Description	The description of what this input variable is used for.
Table	Table referenced for the input variable

11. Under Define Variables, select the Output tab, then select **Add** to add an output variable.
12. On the form, fill in the fields with the following information.

Define Variables input form

Field	Value
Label	The label of the output variable
Name	The name of the output variable used within the data collector script
Type	The data type of the output variable. This can be reference, integer, string/
Description	This is the description of the output variable.

13. Under Data collector script, enter the following code snippet:

```
(function(inputs, outputs) {
    var totalGrossIncome = 0;

    var incomeDetailsGr = new
 GlideRecord("sn_svc_appl_info_income_details");
    incomeDetailsGr.addQuery("case_record",
 inputs.case.sys_id);
    incomeDetailsGr.query();
    //Loop through each income details record for the case
    while (incomeDetailsGr.next()) {
        var tempPaymentFrequency =
 incomeDetailsGr.getValue("payment_frequency");

        if(tempPaymentFrequency == "every_2_weeks")
          totalGrossIncome += incomeDetailsGr.amount * 2;
        else if(tempPaymentFrequency == "weekly")
          totalGrossIncome += incomeDetailsGr.amount * 4;
        else if(tempPaymentFrequency == "once_a_year")
          totalGrossIncome += incomeDetailsGr.amount/12;
        else
```

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```
            totalGrossIncome += incomeDetailsGr.amount;
    }

    outputs.total_gross_income = totalGrossIncome;
})(inputs, outputs);
```

14. Select **Save**, then select **Publish**.
15. Select the checkbox next to **Activate this data collector** and then select **Publish**.

Result
A data collector for a policy version is now created.

What to do next
Create an eligibility policy using PaCE

Create an eligibility policy in Grants Management using PaCE

Create an eligibility policy using Grants Management Eligibility Rules Engine to model eligibility rules that can be used to evaluate grants cases.

About this task
Use Policy as Code Engine (PaCE) policies to build out the logic that will determine eligibility and grants. Policies can be saved as templates to quick-start future policy creation. You can create a policy from scratch using Policy Management, and define the logic for that policy using the Policy Builder tool. Policy logic is a set of conditions that is used for determining whether or not an applicant is eligible for one or more of the grant programs offered by your agency. You can set conditions for the policy using the condition fields.

Before you begin
Role required: admin

Procedure
1. From the CRM Workspace sidebar, navigate to the **Policy Home**.
2. Select **All Policies** > **New**.
3. Select **New blank policy** to start from a blank policy, or select from the existing policy templates.
4. Select **Create**.
5. On the **Create New Policy** form, fill in the fields.

Create New Policy form

Field	Description
Policy name	The name of the policy. **Note:** The policy name must be unique, and is used as the identifier of the policy.
Category	Enables you to group and manage policies more efficiently.
Created	Date and time when the policy was created. Auto-populated.

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Field	Description
Updated	Date and time when the policy was updated. Auto-populated.
Description	Additional details for this policy.

6. Select **Save**.
   The newly created policy contains the following tabs:

Tab name	Description
Details	Displays the details of the policy, including policy name, category, date created, and a description.
Policy builder	When you create a policy, a draft policy version is created, and must be published before it is current and can be used. Each policy version contains version metadata, a policy script, and variable input definitions, all of which can be modified. Under the **Policy builder** tab, you can: ○ Edit a policy version. **Note:** Published policies cannot be edited. To edit a published policy, select **Create a copy**. ○ View version details ○ Create a new version ○ Switch from low-code to the code editor ○ Save the policy as a template ○ Compare versions ○ Duplicate policy versions For more details, see Manage PaCE policy versions. **Note:** You must publish a policy version to make it current before it can be used.
Version management	Displays previous versions of the policy. You can also create a new version of the policy.
Mappings	Enables you to define the grant model to which the policy is to be mapped.
Executions	Enables you to review the execution activity for the policy.

7. Select **Policy Builder** > **Data Sources** > **Data Collectors**, then select **Add**.
8. In the search box, enter `Test Data Collector`, select it, then select **Next**.

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9. In the **Details** tab, add a label in the label field.
10. Select the **Inputs** tab, and in the Case field, select the data pill picker icon (), then select **API variables >** > **Case Reference** > **Inputs** > **Save**.
    This data collector will now be executed when the policy is executed. You can access the output variables by selecting a data pill picker in any if/else condition and selecting data pill picker > Data collectors > Test data collector > Total Monthly Gross Income.
11. To set qualifier conditions for the policy, select **New condition set** and enter the following information:

If statement fields

Field	Description
Condition description	Case constituent is empty.
Source	**API variables** > **Case Reference** > **Constituent**
Operator	is empty
Value	Value to enter text. Select the Data picker icon to concatenate multiple text strings with multiple data pills to select a variable for the log. **Note:** If your Source is choice, you will be unable to select multiple data pills.

Then statement fields

Field	Description
Decision	Non-Compliant
Output type	Result
Data	This case does not have a constituent.

12. Add a dependent condition by selecting **Add else**, then fill in the fields with the following information.

Else statement fields

Field	Description
Decision	Compliant
Output type	Info
Data	This case has a constituent.

13. Select **Publish**.
14. Do one of the following.
    - To publish this eligibility policy for immediate use evaluating Grants applications:
      a. Select **Publish**.
      b. Select **Activate this policy** then select **Publish without testing**.

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c. Verify that the state of the policy has changed to **Current**.

Your eligibility policy is now published and can be used to evaluate any active grants cases. Verify the policy appears in the Policy Home by navigating to **Policy Home** in the CRM Workspace sidebar, and selecting**Policies** > **All Policies**.

- To save this policy as a template for future use:

a. Select **Save as Template** > **New Template**.

b. On the form, fill in the fields.

Policy Template form	Description
Name	Primary Applicant
Template Type	Data Source
Description	Predefined data source for applicant information

c. Select **Save**

Your policy template has been created, and can be used to quick-start future policy creation.

.

Result

An eligibility policy is now created, and is ready to be mapped to one of more grant models of the Grants Management. See Map an PaCE eligibility policy to a grant model using Grants Management Eligibility Framework for information on how to map the published policy to a specific grant.

Map an PaCE eligibility policy to a grant model using Grants Management Eligibility Framework

For a eligibility policy to be invoked correctly, it must be mapped to an existing grant model. Map a published eligibility policy to one or more of the grant types that your agency offers.

Before you begin

Role required: admin

Procedure

1. From the CRM Workspace sidebar, navigate to the **Policy Home**.
2. Select **Mappings** > **Static Mappings** > **New**.
3. Select the grant model that you want to map to from the dropdown.
   Objects available for mapping are displayed.
4. Select the policy that you want to map the grant model to.

Result

The newly created mapping is valid and active, and the mapping input is added to the list of policy mappings.

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Configure PaCE Restricted Caller Access Privileges (RCA)

Define cross-scope access to an application, application resource (such as an access control role, a business rule, a UI action, or a script include), or event. You can use a requested RCA to grant store apps access to protected resources in the ServiceNow AI Platform.

Before you begin

Note: This may have configuration implications across all ServiceNow applications in your instance. Verify the RCA settings of other applications after completing this procedure.

Role required: admin

Procedure

1. In the PaCE workspace, navigate to **All** > **Policies** > **My Policies**.
2. Select **New** > **New blank policy**.
3. Enter a Policy name, then select **Save**.
4. Navigate to **System Application** > **Application Restricted Caller Access Privileges**
5. In Application column filter, enter `=Policy as Code Engine`.
6. In the Source Scope column filter, enter `=Service Applicant Program Management`, and run the filter.
7. Open each record and change the value of Status field to **Allowed**.
8. Select **Submit**.

Configure the Smart Assessment Engine for Grants Management

Create a new Smart Assessment template, which would show up in the compliance assessment field in the proposal playbook. The Smart assessment template is used to collect compliance information from applicants during proposal submission.

Before you begin

Role required: sn_smart_asmt.assessment_admin, sn_svc_appl_pgm_mg.grant_program_manager, or sn_svc_appl_pgm_mg.grant_program_director

Verify your scope is set to **Global**.

About this task

The Smart Assessment Engine (SAE) streamlines and automates assessment processes, and supports various assessment types.

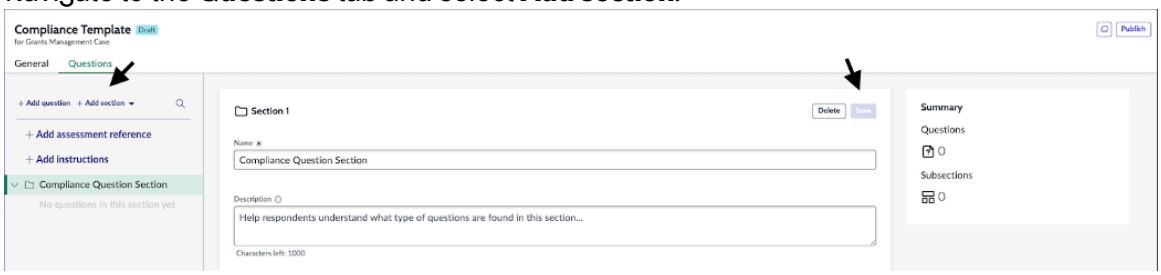
You can create assessment templates for grants compliance, and add instructions, questions, and reference information by using the template designer in the Smart Assessment Engine application. Smart assessments can help you to evaluate various situations, aspects, or records.

Procedure

1. Navigate to **All** > **Smart Assessment Engine** > **Administration** > **Template Categories**.
2. Select **New** to create a template category.
3. On the form, fill in the fields.
   In the Category role field, enter `sn_smart_asmt.template_manager`. In the Assessment Targets field, select **Grants Management Case**.
4. Select **Add section** in the Questions tab, then fill in the details for the section and select **Save**.
5. Select **Add question** to add a Single Select Dropdown Question, then.

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6. After adding all the questions, select **Publish**.
7. Select **Submit**.
8. Navigate to **Workspaces** > **Assessment Workspace**
9. Select **New Template**, and on the form, fill in the fields.
   In the Assessment targets field, enter **Grants Management Case**.
10. Navigate to the **Questions** tab and select **Add section**.



11. On the form, fill in the details for the section, then select **Save**.
12. Select **Add question**, and add a Single Select Drop-down Question of your choice.
    Repeat until you have added all of your desired questions.
13. Select **Publish**.

Result

The template is now published, and can be selected in the **Compliance Assessment**activity of the Grants Setup Playbook. It is used to collect compliance information from applicants during proposal submission.

Configure grants program record tabs in Grants Proposal Playbook

You can add or modify the tabs displayed on the Grant Program Record Page.

Before you begin

Role required: admin

Set the application scope in your instance to **Service Applicant Program Management**.

Procedure

1. Navigate to **All** > **sys_ux_app_route.list**.
2. In the Extension Point column, select the More Options •••) icon, and select **Group by Extension Point**.
3. Select **Grant Program Record Page Collection**.
   Select a page to modify it, or select the settings icon to delete the page.
4. To create a new page, select **New**, and on the form, fill in the fields with the name and URL path of the page.
5. Select **Continue**.
6. Enter the name, audience, and required parameters of the page, if applicable, and select **Continue**.
7. Next, choose whether you want the page to be responsive, then select **Continue**.
   The page is created, and a new tab will appear on the Grant Program Record page.

Configure record tab order in Grants Proposal Playbook

You can control the display order of tabs on the Grant Program Record Page.

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Before you begin
Role required: admin

Set the application scope in your instance to Service Applicant Program Management.

Procedure

1. Navigate to **All** > **sys_ux_app_route.list**.
2. In the Extension Point column, select the More Options •••) icon, and select **Group by Extension Point**.
3. Select **Grant Program Record Page Collection**.
4. Locate the UX app route entries for the tabs you wish to reorder.
5. Select **Save**, and verify the new sequence is correct.

Configure the Reviewer Service Portal

Configure the Grants Management Reviewer Service Portal for merit reviewers to track, score, and review grants proposals.

Before you begin
Role required: admin

Procedure

Navigate to **All** > **Service Portal** > **Service Portal Configuration**.
Some of the components that you can customize include:

- Branding: Configure the portal branding to give the reviewer service portal its own look and feel. The Coral Theme is available for the reviewer service portal.
- Menus: Update the base system menu or add a new one. For details, see Configure the portal header menu.
- Home page: Update the default home page by updating the widget configuration or assign a custom home page. For details, see Assign a homepage to the portal.
- Widgets: Use configurable portal widgets to define the content in your portal. For details, see Configurable Portal widget library.
- Header: Update the program header configurations according to your agency's needs. For details, see Configure a custom program record header in the Reviewer Service Portal.
- List pages: Browse, search & filter through records of cases, products, orders, and others. For details, see Add and configure the Portal Data List widget
- Roles: Configure page security by role to either set up pages to be public (no login required) or to filter them by user role.
- Knowledge base: Configure a knowledge base to house the merit review framework for users in the portal to view the associated knowledge articles. For details, see Configure the Merit Review Scoring Framework for a Grant Program in the Reviewer Service Portal.

Configure a custom program record header in the Reviewer Service Portal

As an admin, you can configure the custom widget that renders the Program header displayed to the merit reviewer persona in the Reviewer Service Portal.

Before you begin
Role required: admin

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Procedure

1. Navigate to **All** > **System Extension Points** > **Scripted Extension Points**.
2. Select `sn_gsm.StandardTicketExtension`.
3. Select **Create implementation** from the Related Links list.
4. On the form, fill in the fields.

   Ensure that **handle** is marked **true** for the when you want the implementation to be shown. Set the fields that you want to return by using the process() command.

5. Select **Update**.

Set up a grant program in Grants Management

Set up and configure the details of a new grant program using Grants Management.

Create a Grants Program results letter template

As an agent or Grants Program manager, you can use templates to compose letters informing applicants of the result, choosing from Award, Rejection (ineligible), and Rejection (decline). These letters are displayed to applicants on the Grants Management Portal, once a decision has been communicated.

About this task

You can create and define several results letter or document templates that are used to notify applicants about the final status of their grants proposals. The applicant is then notified and can access and view their results letter and merit review summaries on the applicant portal. If their proposal is approved, they can decline or accept the award notice.

Before you begin

Role required: sn_svc_appl_pgm_mg.grant_program_manager or sn_svc_appl_pgm_mg.grant_program_director

Procedure

1. Navigate to **All** > **CSM Configurable Workspace** > **Lists**.
2. Select **Grant Programs** > **My grant programs** and select a grant program.
3. Navigate to the Decision activity, and select create letter.

Configure Restricted Caller Access for a results letter

Once the Grant Program Manager is ready to release the results letters for the applicants, the letters can be configured using Restricted Caller Access.

Before you begin

Role required: admin

Verify that the scope is set to **Document Templates**.

Procedure

1. Navigate to **System Application** > **Application Restricted Caller Access Privileges**
2. Select **New**.
3. On the form, fill in the fields with the following information.

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Source Scope	Grants Management Playbook
Source Type	Script Include
Source	Script Include: GrantManagementUtilImpl
Status	Allowed
Target Scope	Document Templates
Target Type	Table
Target	Table: HTML Template
Operation	Read

4. Select **Submit**.
5. Select **New**.
6. On the form, fill in the fields with the following information.

Source Scope	Grants Management Playbook
Source Type	Script Include
Source	Script Include: Script Include: GrantManagementUtilImpl
Status	Allowed
Target Scope	Document Templates
Target Type	Script Include
Target	Script Include: HtmlTemplateUtils
Operation	Execute API

Configure the Merit Review Scoring Framework for a Grant Program in the Reviewer Service Portal

Define the scoring framework that a merit reviewer should follow as they review and score grant program proposals in the Reviewer Service portal. You can also select which knowledge bases or frameworks are displayed to a merit reviewer in the Reviewer Service portal.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **Service Portal** > **Portals**.
2. Select the portal for which you want to display the desired merit review framework. Select the Reviewer Service Portal. For information on how to create a merit review framework, see Create a custom Merit Review scoring framework for a Grant Program in the Reviewer Service Portal.
3. Select the desired scoring framework.
4. Add a scoring rubric.

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A rubric is a Knowledge Article which needs to be added to this program so that the evaluators/reviewers know how to judge the proposals.

5. In the Knowledge Bases related list, select **Edit**.
6. On the Edit Members form, move the desired knowledge bases from the available items in the **Collection** column to the **Knowledge Bases List** column.
7. Select **Save**.

Related topics

Create a knowledge base

Create a custom Merit Review scoring framework for a Grant Program in the Reviewer Service Portal

Start scoring grant proposals based on your agency's preferences by creating a custom scoring framework.

About this task

Scoring frameworks provide a structured method to evaluate and prioritize initiatives, projects, and demands based on predefined criteria. This allows merit reviewers to score applications based on the consistent criteria.

Before you begin

Role required: admin, sn_svc_appl_pgm_mg.scoring_framework_writer, sn_svc_appl_pgm_mg.scoring_framework_attribute_writer

Ensure the scope is set to **Service Applicant Program Management**.

Procedure

1. Navigate to **All** > **Strategic Planning** > **Scoring Frameworks**.
2. Select **New**.
3. Enter a name of your scoring framework in the **Name** field.
4. Enter the details of your scoring framework in the **Description** field.
5. Select the checkbox next to **Active** to make the framework available for use with the Reviewer service portal.
6. Select **Submit**.

What to do next

Create a merit review scoring framework attribute

Create merit review scoring framework attributes for a Grant Program in the Reviewer Service Portal

Add attributes within your scoring framework.

About this task

The following attribute types can be added to a scoring framework:

- Choice: For attributes with predefined values (such as high, medium, or low)
- Decimal: For attributes with number ranges and min/max values
- Integer: For attributes with number ranges and min/max values
- String: For the weighted calculation of all attributes

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Before you begin
Role required: admin

Procedure

1. Navigate to **All** > **Strategic Planning** > **Scoring Frameworks**.
2. From the Scoring Frameworks list, select a framework for which you want to add the Scoring Framework Attributes.
3. Select **New**, from the Scoring Framework Attributes related list.
4. On the form, fill in the fields.

Scoring Framework Attribute form

Field	Description
Label	Name that defines the scoring Framework.
Type	Type of the label, such as integer, choice, star, and so on.
Description	Details of the Scoring Framework.

Tip: If you want to add a choice type scoring attribute, you must have selected Decimal or Integer in the **Type** field, and Choice in the **Display type** field.

To add a choice-list attribute:

a. In the Choices related list, select **New**.

5. Select **Submit**.
6. Repeat this procedure until all Scoring Framework Attributes have been added.

Note: Every scoring framework can only have one final score. Select the checkbox for the final score attribute for only one attribute.

What to do next
Create a final score attribute for the merit review scoring framework

Create a final score attribute for the merit review scoring framework

Add attributes within your scoring framework.

Before you begin
Role required: admin

Procedure

1. Navigate to **All** > **Strategic Planning** > **Scoring Frameworks**.
2. From the Scoring Frameworks list, select a framework for which you want to add the final score attribute.
3. Select **New**, from the Scoring Framework Attributes related list.
4. On the form, fill in the fields.

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Scoring Framework Attribute form

Field	Description
Label	Name that defines your Scoring Framework's final score. **Enter Final Score**.
Type	Type of the label, such as choice, decimal, integer, or string.
Description	Details of the Scoring Framework attribute.

5. Select the **Final score** option to mark this attribute as the final score attribute of your Scoring Framework.
6. Select the **Active** option to mark this attribute available for use with your Scoring Framework.
7. Select the **Calculated Value** tab and add a formula to derive the value of the final score attribute
   This formula should be based only on the scoring attributes of your scoring framework.
8. Select **Update**.

What to do next

Configure a merit review scoring rubric for a grants proposal

Configure a merit review scoring rubric for a grants proposal

Create a knowledge article containing information on how merit reviewers are to score the proposals, known as a rubric.

About this task

There are three ways of creating knowledge articles.

- **Self-Service** > **Knowledge** > **Create an Article**
- **Knowledge** > **Articles** > **Create New**
- From the **Knowledge Management homepage**, select the **More** icon (⋮), then select **Create Article**.

Before you begin

Role required: admin

Procedure

1. On the **Create New article** page, select a knowledge base.
   The list of article templates to select in the next step is filtered according to the article templates available for the selected knowledge base.
2. Select an article template, then select **Next**.
   The Knowledge form is displayed based on the article template selected. Common templates include:
   - **FAQ**: For Q&A-style articles.
   - **How-To**: For step-by-step instructions.
   - **Landing Page**: Overview page linking to related articles.
   - **KCS Article**: For known issues and workarounds.
3. On the Knowledge form, fill in the fields.

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For more information on the Knowledge form fields, see Create a knowledge article.

4. Select **Submit** to save the draft.

Result

An ownership group reviews and approves the article. Once approved, it can be published immediately or on the scheduled date.

Note: If no ownership group is assigned, the article automatically goes to the knowledge administrator and knowledge manager for approval.

All knowledge articles are available for selection under both the Rubric section of the Merit Review activity, as well as the Article number section of the Resources and support activity, once the Knowledge article resource type is selected.

Configure budget categories in Grants Management

Configure the budget categories that appear in the Program budget activity of the playbook.

About this task

By default, the Grants Management contains the following required budget categories:

- Administration: Costs related to project management, administrative support, and general operating expenses directly attributable to the project.
- Award: Total award amount requested, including all direct and indirect costs for the entire project period.
- Contractual: Costs for services to be provided by external organizations or consultants, including subcontracts, licensing costs, consulting agreements.
- Equipment: Total cost for all equipment necessary for project execution.

Before you begin

Role required: admin

Confirm the application scope is set to **Service Applicant Program Management**.

Procedure

1. Navigate to **All** > **System Definition** > **Dictionary**.
2. In the column name field, search for , and select the entry that has Grant Program as the table.
3. Select the choices tab.
4. Select the category you want to modify.
5. Identify the numeric value of the categories corresponding to each label.
6. Navigate to **All** > **Process Automation** > **Playbook Designer**.
7. From the new tab, under the Playbooks tab, identify the Grant Program Setup playbook, and open it.
   The default playbook is “Program setup”, but you should refer to your cloned version.
8. Select the Program budget activity, then select **Show additional options**.
9. Select **UI layout**, then the **Required categories** field.
10. Populate the field with the values corresponding to the category you want to add.
    If there are multiple categories, separate the value with comma.
11. Select **Save and close**, then select **Activate**.

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Result
The new configuration should appear in the **Program budget** activity of the grants setup playbook.

Configure the Spending Overview Widget and Filter pills

Use script includes to configure the **Spending Overview** widget and filter pills on the **Funding Allocation** tab for the rolling grant approvals feature. Admins can add, remove, relabel, and reorder chart widgets and filter pills, and create custom ones to match program requirements.

Before you begin
The **Spending Overview** widget and filter pills are available on the **Funding Allocation** tab starting with Grants Management version 1.31. Verify that the grant program is open and in an active state before making configuration changes. For information about using script includes, see Use script includes.

Role required: admin

About this task
The **Spending Overview** widget is a UI Builder component on the **Funding Allocation** tab. It contains two built-in chart areas: **Overall Spending** and **Decisions in Progress**. You can add custom chart widgets to the panel alongside the built-in charts.

The filter pills appear in the **Proposals** tab under the **Scored Proposals** list. They provide quick-access views by proposal status. The default filter pills are:

- **All**
- **Undecided**
- **Marked**
- **Pending approval**
- **Returned**
- **Decided**

You can relabel, reorder, add, remove, or create custom filter pills with custom filter conditions by configuring the `FundingAllocationUtil` and `FundingAllocationUtilImpl` script includes.

You can also use UI Builder to configure the Funding allocation tab widgets of the Grants management playbook. In UI Builder, navigate to **Page collections** > **Grant Program Record Page Collection** and select the **Funding allocation** page. Configure the values in the **Funding allocation review task record page** and the **Funding allocation tab page**. For more information, see Working in UI Builder.

Procedure
1. Navigate to **All** > **Activity subscriptions** > **Administration** > **Script Includes**.
2. Open the `FundingAllocationUtilImpl` script include.
3. Configure the values by overriding the methods and add them to the `FundingAllocationUtil` script.
4. Select **Save** to apply your changes.
   Once you reload the page, the **Funding Allocation** tab reflects the updated widget layout and filter pill configuration for all users with access to the grant program workspace.

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What to do next

To verify the configuration, open a grant program record and select the **Funding Allocation** tab. Confirm that the **Spending Overview** widget and filter pills display as configured.

Configure program lifecycle stepper

Control the visibility of the program lifecycle stepper on the Grant Program record page. The stepper is turned off by default and can be enabled at the instance level for deployments that follow a batch or competitive grant lifecycle.

About this task

The program lifecycle stepper displays six steps on the Grant Program record page: Preparing Program, Accepting Proposals, Evaluating, Awarding, Post-Award, and Closed. Each step reflects a stage in the grant program lifecycle. The steps advance automatically based on the program state. The stepper is turned off by default for all new and existing grant programs. An admin can enable the stepper by toggling on the Grant program Stepper system property for deployments where staged progression through the steps is meaningful.

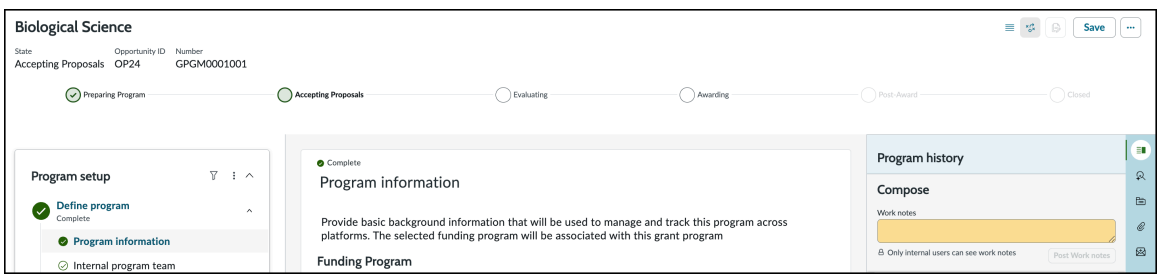
When the stepper is enabled, all existing stepper behavior is preserved. When the stepper is turned off, no stepper component is rendered on the Grant Program record and the Grant Program playbook views.

Steps 1 through 4 advance automatically based on the program state. Steps 5 and 6 are inactive from Grants management version 1.41 onward. The steps in order are:

1. Preparing Program
2. Accepting Proposals
3. Evaluating
4. Awarding
5. Post-Award (inactive)
6. Closed (inactive)

Each step has one of the following display states:

- **None**: The step hasn't started.
- **Partial** (Highlighted): The step is in progress. This is the current active step.
- **Done** (Checkmark): The step is complete. The program has advanced past this step.



The steps advance automatically based on the program state.

- **Preparing Program**: The stepper displays Step 1 as partial (in progress) when the grant program state is `draft`. All other steps remain in the "None" state. This is the default display state when no valid program record is found.
- **Accepting Proposals**: The stepper advances to Step 2 when the grant program state changes to `accepting_applications`. Step 1 is marked as done and Step 2 displays as partial.

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- **Evaluating**: The stepper advances to Step 3 when the grant program state changes to `applications_closed` and merit reviews take place. Steps 1 and 2 are marked as done and Step 3 displays as partial.
- **Awarding**: The stepper advances to Step 4 only when the program state is `applications_closed` and all linked merit review tasks have reached a final state. The system checks every task for each proposal linked to the grant program and verifies that proposal's merit review task is in a final state. If all merit review tasks are final, Steps 1 through 3 are marked as done and Step 4 displays as partial. If even one merit review task remains open across the entire grant program, the stepper stays in step 3. At this stage, all the proposals are in the `ready_for_proposal` state.
- **Post-Award** and **Closed** steps are turned off in the stepper UI as they are reserved for future use.

Note:

The configuration scope is per instance and not per individual grant program.

Before you begin
Role required: admin

Procedure
1. Navigate to **All** > **Public Sector Workspace**.
2. Navigate to **All** > **System Properties** > **All Properties**.
3. Select **sn_svc_appl_pgm_mg.admin**.
4. In the **Value** field, enter `true`.
5. Select **Update**.

Result
The program lifecycle stepper is now visible on all Grant Program record pages in the instance. The stepper displays the current program state: Preparing Program, Accepting Proposals, Evaluating, Awarding, Post-Award, and Closed.

Install and configure the Social Benefits Playbook application

Install the Social Benefits Playbook application, which enables public sector end users to submit and track social benefit requests and provides government agents with a pre-defined process for handling and resolving these requests. You can then configure the features available for submitting requests and routing requests to agents.

As a user with the admin role, complete the following configuration tasks to set up the Social Benefits Playbook, after you install the Public Sector Digital Services Core application.

Configuration tasks for Social Benefits Playbook

Task	Description
Install Social Benefits Playbook for Public Sector Digital Services	Install Social Benefits Playbook (app-psds-social-benefits) from the ServiceNow® Store.
Automatically route social benefit requests using Advanced Work Assignment	Use the ServiceNow Advanced Work Assignment (AWA) application to route and assign social benefit requests to designated agents.

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Configuration tasks for Social Benefits Playbook (continued)

Task	Description
Configure Eligibility Rules Engine in Social Benefits Playbook	Configure the eligibility framework engine to allow agents to confirm whether an applicant is eligible for the specific social benefits requested.

Install Social Benefits Playbook for Public Sector Digital Services

You can install the Social Benefits Playbook application (app-psds-social-benefits) if you have the admin role.The application includes demo data and installs related ServiceNow® Store applications and plugins if they aren't already installed.

Before you begin

- Ensure that the application and all of its associated ServiceNow Store applications have valid ServiceNow entitlements. For more information, see Get entitlement for a ServiceNow product or application.
- Certain features in the Social Benefits Playbook application are available based on your ServiceNow entitlements and may require installation of other ServiceNow applications and activation of specific plugins.

  Note: Install the Playbooks for Customer Service Management application to enable the playbook experience.

- Review the Social Benefits Playbook application listing in the ServiceNow Store for information on dependencies, licensing or subscription requirements, and release compatibility.

Role required: admin

About this task

The Social Benefits [sn_gsm_social_benefits_case] table is installed with Social Benefits Playbook.

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the Social Benefits Playbook application (sn_gsm_soc_bnfts) using the filter criteria and search bar.

   You can search for the application by its name or ID. If you cannot find the application, you might have to request it from the ServiceNow Store.

   In the list next to the **Install** button, the versions available to you are displayed.
3. Select a version from the list and select **Install**.

   In the Review Installation Details dialog box, any dependencies installed with your application are listed.
4. If you're prompted, follow the links to the ServiceNow Store to get any additional entitlements for dependencies.
5. **Optional:** If demo data is available and you want to install it, select the **Load demo data** check box.

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Demo data are the sample records that describe application features for common use cases. Load the demo data when you first install the application on a development or test instance.

6. Select **Install**.

Configure Eligibility Rules Engine in Social Benefits Playbook

The eligibility criteria in Social Benefits Playbook allows an agent to confirm whether an applicant is eligible for the benefit program being requested.

This section provides information for setting up PaCE (Policy as Code Engine) and using it within the Social Benefits Playbook. Eligibility policies are established by defining, testing, and publishing eligibility policies in the policy management home, mapping published policies to one or more benefit type(s), and updating existing policies as laws and regulations change.

The eligibility criteria in the License and Permit Playbook and Social Benefits Playbook allow an agent to confirm whether an applicant is eligible for the specific license or permit requested. The playbooks use eligibility criteria, a series of questions posed to an applicant, to determine whether they are eligible to apply for a license or permit. Using a set eligibility criterion for the Playbooks may aid in deflecting applications in which the applicant is not eligible to obtain a license or permit.

Eligibility criteria are established by performing the following three activities:

- Creating a checklist template for the license or permit class
- Adding the eligibility checklist to the license or permit record producer
- Mapping it to the respective license or permit class

If the applicant fulfills all the eligibility criteria, then the agent can proceed in creating a case for the applicant. If the applicant does not fulfill at least one of the eligibility criteria, an agent cannot proceed in creating a case for the applicant.

Configure the Preliminary Verification Checklist UI in Social Benefits Playbook

Configure the preliminary verification checklist to determine if an applicant is eligible to begin an application for one or more social benefits.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **System Definition** > **Decision Tables**.
2. Select the **Social Benefits Preliminary Verification** table by selecting the label.
3. Under Inputs, enter one or more labels for your desired verification questions, and select **String** as Type.
4. Add the necessary filter conditions using the condition builder.
   These conditions determine the outcome of the policy.
5. Add a condition column for each input above by selecting the **Add**icon.
6. Use the dropdown to set what combination of answers will yield an approval or denial.

Result

The questions are shown on the first page of the Government Service Portal intake page.

Define Eligibility Questions in Social Benefits Playbook

Configure the eligibility criteria questions for users beginning an application for social benefits.

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Before you begin
Role required: admin

Procedure
1. Navigate to **All** > **Service Catalog** > **Catalog Variables** > **Variables Sets**.
2. In the Variable Set list view, select **New**.
3. Select **Single-Row Variable Set**.
4. Enter the desired title and internal name and select **Submit**.
5. In the list, locate and open the newly created Variable Set.
6. In the **Variables** related list, select **New** to create a variable for each eligibility question.
7. Select **Yes/No** as the variable type.
8. Repeat steps 6-7 until a variable is created for each eligibility question.
9. Create a variable with the name **Eligible**, and enter **Yes/No** in the Question field.
10. Select **Yes/No** as the variable type.
11. In the **Catalog UI Policies** related list, select **New**.
12. Enter a short description for the policy.
13. Navigate to the **When to Apply** tab.
14. Add a catalog condition to the UI policy for each eligibility question, and set the condition to **is Yes**.
15. Navigate to the **Script** tab, and add the following scripts to the True and False conditions.
16. Select **Submit**.
17. Navigate to#**All** > **Service Catalog** > **Catalog Definition** > **Record Producers**.
18. Locate the License/Permit Record Producer and open the record.
19. Navigate to the **Variable Sets** tab and then select **Edit**.
20. Locate the Variable Set created for the eligibility criteria and move it to the variable sets list by selecting the right arrow button.
21. Select **Save**.

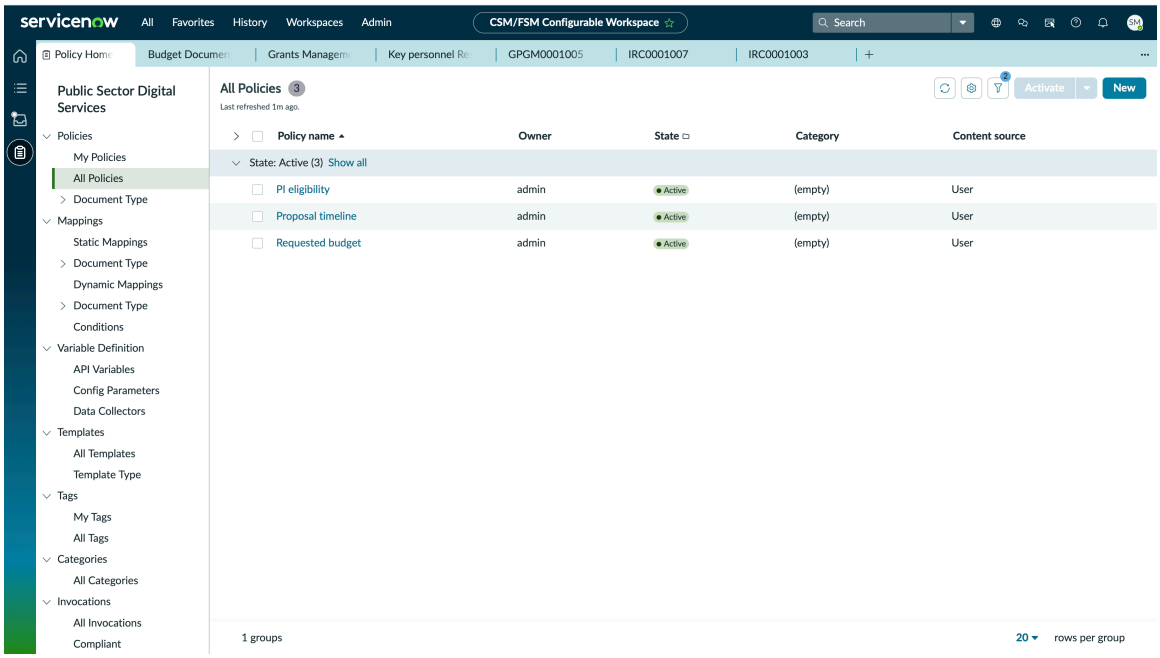
Result
The eligibility criteria questions are now defined and can be used to determine if a constituent is eligible to begin a social benefits application.

Configure Eligibility Rules Engine Policies in Social Benefits Playbook

Use the Social Benefits Playbook Eligibility Rules Engine, powered by Policy as Code Engine (PaCE), to manage the life cycle of a policy and create, update, review, and execute policies. In the Policy Home of the CRM Workspace, you can create, remove, and update the policies used for determining eligibility for an application routed through the Social Benefits Playbook.

You can define and manage your eligibility rules engine policies in a single management console, the Policy Management Home in CRM Workspace.

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Here, you can:

- Create policies.
- Review existing policies.
- Assess and implement changes to each policy.
- Determine if a policy should be used as the template for another policy.
- Understand why a policy may not be working as expected.

You can create any number of policies, which can be updated as required.

Create an eligibility policy using the Social Benefits Playbook Policy as Code Engine (PaCE) Eligibility Rules Engine

Create an eligibility policy using Social Benefits Playbook Eligibility Rules Engine.

About this task

Use Policy as Code Engine (PaCE) policies to build out the logic that will determine eligibility and benefits. Policies can be saved as templates to quick-start policy creation. You can create a policy from scratch using Policy Management, and define the logic for that policy using the Policy Builder tool. Policy logic is a set of conditions that is used for determining whether or not an applicant is eligible for one or more of the social benefit programs offered by your agency. You can set conditions for the policy using the condition fields.

Before you begin

Role required: admin

Procedure

1. From the CRM Workspace sidebar, navigate to the **Policy Home**.
2. Select **All Policies** > **New**.
3. Select **New blank policy** to start from a blank policy, or select from the existing policy templates.
4. Select **Create**.
5. On the **Create New Policy** form, fill in the fields.

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Create New Policy form

Field	Description
Policy name	The policy name. **Note:** The policy name must be unique, and is used as the identifier of the policy.
Category	Enables you to group and manage policies more efficiently.
Created	Date and time when the policy was created. Auto-populated.
Updated	Date and time when the policy was updated. Auto-populated.
Description	Additional details for this policy.

6. Select **Save**.
The newly created policy contains the following tabs:

Tab name	Description
Details	Displays the details of the policy, including policy name, category, date created, and a description.
Policy builder	When you create a policy, a draft policy version is created, and must be published before it is current and can be used. Each policy version contains version metadata, a policy script, and variable input definitions, all of which can be modified. Under the **Policy builder** tab, you can: ○ Edit a policy version. **Note:** Published policies cannot be edited. To edit a published policy, select **Create a copy**. ○ View version details ○ Create a new version ○ Switch from low-code to the code editor ○ Save the policy as a template ○ Compare versions ○ Duplicate policy versions For more details, see Manage PaCE policy versions.

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Tab name	Description
	Note: You must publish a policy version to make it current before it can be used.
Version management	Displays previous versions of the policy. You can also create a new version of the policy.
Mappings	Enables you to define the benefit model to which the policy is to be mapped.
Executions	Enables you to review the execution activity for the policy.

7. Set conditions for the policy using the condition fields.
8. **Optional:** Add a condition set by selecting **New condition set**.

If and else if statement fields

Field	Description
Condition description	Description of the field.
Source	Variable you want to source for the condition.
Operator	List of operators to filter the source for the condition. The list changes depending on the source selected.
Value	Value to enter text. Select the Data picker icon to concatenate multiple text strings with multiple data pills to select a variable for the log. **Note:** If your Source is choice, you will be unable to select multiple data pills.

9. **Optional:** Add a dependent condition by selecting **or** or **and** next to the condition.

Then and else statement fields

Field	Description
Decision	Decision to determine if the policy is **Compliant** or **Non-compliant**.
Log level	Level of the log.
Log message	Log message field to enter text or select the Data picker icon to concatenate multiple text strings with multiple data pills to select a variable for the log.
Output type	Output type of the log. You can select the plus icon to add multiple output types or the minus icon to delete the output type.

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Field	Description
Data	Data field to enter text. Select the Data picker icon to concatenate multiple text strings with multiple data pills to select a variable for the log.

10. Select **Publish**.

Result
An eligibility policy is now created, and is ready to be mapped to one of more benefits models of the Social Benefits Playbook. See Map an PaCE eligibility policy to a benefit model using Social Benefits Playbook Eligibility Framework for information on how to map the published policy to a specific benefit.

Map an PaCE eligibility policy to a benefit model using Social Benefits Playbook Eligibility Framework

For a eligibility policy to be invoked correctly, it must be mapped to an existing benefit model. Map a published eligibility policy to one or more of the social benefit types that your agency offers.

Before you begin
Role required: admin

Procedure
1. From the CRM Workspace sidebar, navigate to the **Policy Home**.
2. Select **Mappings** > **Static Mappings** > **New**.
3. Select the social benefit model that you wish to map to from the dropdown.
   Objects available for mapping are displayed.
4. Select the policy that you wish to map the social benefit model to.

Result
The newly created mapping is valid and active, and the mapping input is added to the list of policy mappings.

Update an eligibility policy in the Social Benefits Eligibility Framework Engine

Update an eligibility policy in the Social Benefits Eligibility Framework Engine.

Before you begin
Role required: admin

Procedure
1. From the CRM Workspace sidebar, navigate to the **Policy Home**.
2. Select **All Policies**, and select the policy name.
3. Do one of the following, depending on what information you want to update.

Select...	To...
Select the Details tab.	Edit details such as the policy name, category, date, and description.

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Select...	To...
Select the Policy Builder tab.	Make changes to the policy logic, and switch between versions to take various actions at the version level. **Note:** Published versions of policies cannot be updated. To make changes to the logic of an existing policy, select **Cre ate a copy** to create a new version of the existing policy that can be updated ac cordingly.
Select the Version Management tab.	Manage different versions of a policy.
Select the Mappings tab.	Update or review the benefits to which the giv en policy is mapped.
Select the Executions tab.	Update or review the execution activity for the given policy.

Update a policy logic in the Social Benefits Eligibility Framework Engine

Make changes to the policy logic in the Social Benefits Eligibility Framework Engine. The Policy Builder tab allows an admin to test new logic parameters through the test playground.

Before you begin

Role required: admin

Procedure

1. From the CRM Workspace sidebar, navigate to the **Policy Home** and select **All Policies**.
2. Select the policy name, and select the **Policy Builder** tab.
3. Select **Create a copy** to create a new version of the existing policy that can be updated accordingly.
   A new draft is created that changes can be appended to.
4. Update the value or condition you wish to change, or add a new piece of logic to the eligibility policy.
5. Select the Test Playground icon in the contextual side panel to test the policy.
6. Select the parameters of the policy logic and select **Run Test**.
7. Review the Output log to ensure there are no issues or errors introduced by the new parameters.
8. Select **Publish**.
9. Select **Publish** again, if prompted.
   The previous version of the policy is archived, and the newly published version is made the current production version.

Update policy mapping in the Social Benefits Eligibility Framework Engine

You can edit the mapping settings that map a policy to a benefit model.

Before you begin

Role required: admin

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Procedure

1. From the CRM Workspace sidebar, navigate to the **Policy Home** and select **All Policies**.
2. Select the policy name for the policy that you want to update, and select the **Mappings** tab.
3. Select the Mapping ID in the Input field.
4. In the displayed mapping input form, edit the desired details, and select **Save**.
5. **Optional:** Select **Add** to add a new benefit model to the list of mappings for the policy.

Create an eligibility policy template

Create eligibility policy templates for the Social Benefits Playbook policy forms that you use frequently.

Before you begin

Role required: admin

Procedure

1. From the CRM Workspace sidebar, navigate to the **Policy Home**.
2. Navigate to **Templates** > **All Templates**.
3. Select **New**.
4. In the Create New Template form, fill in the fields.

Create New Template form

Field	Description
Name	Name of the policy template.
Template type	Template type organized by category. Template types enable you to select a category, if you have multiple types of policy templates. You can create a template type by following these steps: **a.** Navigate to **Templates** > **Template Type**. **b.** Select **New**. **c.** Fill in the **Name** and **Description** field. **d.** Select **Save**. The type can be selected from the **Template type** field.
Description	Additional details for this template.
Is low code	Select this check box if the policy template will be written in low-code. **Note:** You can switch to the code editor from low-code when you create the conditions, but you'll be unable to switch back to low-code.
Updated	Date and time when the policy template was updated.

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Field	Description
Updated by	User who updated the policy template.
Created	Date and time when the policy template was created.

5. Select **Save**.
   New templates are inactive by default. Select the inactive filter box on the new policy page to view the inactive template.
6. Select the **Template Builder** tab and fill in the conditions in the Policy logic section, then select **Save**.
   For more information about the parameters and condition fields, see Passing parameters to PaCE policies and Policy logic condition fields.

What to do next
Before you activate your template, you can create a policy to test the template.

1. Navigate to **Policies** > **My Policies**.
2. Select **New**.
3. Select **Preview** to verify the information is correct.
4. Select **Save**.
5. Select the template that you wish to create a policy with, then select **Create**.
6. Fill in the fields, then select **Save**.
7. Select the new draft of the policy and select the **Test Playground** tab to test the policy.
8. Navigate back to **Templates** > **All Templates**. Select the template that you tested, then **Activate**.

Note: Updating a template won't affect policies created previously with that template.

Create a PaCE Eligibility Policy from a template

Use an existing policy template created to quick-start the creation of a new eligibility policy with a similar set of data sources.

About this task
Use an existing policy template created to quick-start the creation of a new eligibility policy with a similar set of data sources.

Before you begin
Verify the template is activated. .

Role required: admin

Procedure
1. From the CRM Workspace sidebar, navigate to the **Policy Home** and select **All Policies**.
2. Select **New**.
3. Select the desired template.
4. Update the policy details with the details of the policy you are creating.
5. Select the **Policy Builder** tab.
6. On the **If** form, fill in the fields.

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7. On the **Or** form, fill in the fields.
8. On the **Then** form, fill in the fields.
9. Select **Add else**, and fill in the fields.
10. Select **Save**.
11. Select **Publish**, and on the pop-up modal, select the checkbox for **Activate this Policy**, then **Publish without testing** to confirm activation of the policy.

Result

The policy is now activated and can be used to evaluate eligibility for any open Social Benefits case. A version of the policy should appear in the Version Management tab, as will any subsequent updates to the policy. You can publish any version of the policy at any time. For more information on PaCE policy version control, see Manage PaCE policy versions.

Configure automatic cancellation for draft cases in Social Benefits Playbook

An admin can configure auto-cancellation of Social Benefits Playbook cases that remain in the draft state for longer than a set period of time. The number of days that the case can remain in the draft state before it is canceled can be configured by an admin. The default value is five days.

About this task

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **System UI** > **Script Includes** and search for the `SocialBenefitsConstants` record.
2. Select the record to open it.
3. **Optional:** Switch to the Social Benefits Playbook application to edit the record, if prompted.
4. Locate the `SocialBenefitsConstants.SOCIAL_BENEFITS_MODELS_ARRAY = [` function in the script.
5. Open a separate tab in your instance.
6. In the navigation bar, enter `cmdb_model.list` to display a list of all product models in Public Sector Digital Services playbooks.
7. Right-click on the name of the desired product model record in the Social Benefits Playbook, and in the context menu, select **Copy sys_id**.
   For example, to close all draft applications submitted for Unemployment Insurance, right click the Unemployment Insurance record and copy the sys_id.
8. Paste the copied sys_id(s) into the `SocialBenefitsConstants.SOCIAL_BENEFITS_MODELS_ARRAY = [` function, adding more as needed.
9. Right click on the top menu bar, and in the context menu, select **Save**.
10. **Optional:** Navigate to **All** > **System Properties** > **All** and search for the `sn_gsm_soc_bnfts.sb_cancel_draft_state` record.
11. **Optional:** Switch to the Social Benefits Playbook application to edit the record, if prompted.
12. **Optional:** Change the number in the **Value** field to set the number of days that a case can remain in the draft state before cancellation, and select **Update**.

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Result

The Social Benefits Playbook is now configured to auto-cancel any draft cases that have remained in the draft state for more than X number of days.

Install and configure the License and Permit Playbook application

Install the License and Permit Playbook application, which enables public sector end users to submit and track license and permit requests and provides government agents with a pre-defined process for handling and resolving these requests. You can then configure the features available for submitting requests and routing requests to agents.

As a user with the admin role, complete the following configuration tasks to set up the License and Permit Playbook, after you install the Public Sector Digital Services Core application.

Configuration tasks for License and Permit Playbook

Task	Description
Install License and Permit Playbook for Public Sector Digital Services	Install License and Permit Playbook (com.sn_public_sector_digital_services_core) from the ServiceNow® Store.
Configure service definition catalog items for License and Permit Playbook application	The Services Offered and Services Received tables have been migrated into the Service Definition table. All Services Offered data must be converted into individual Service Definitions. For more information, see Services Offered and Services Received Migration Guidance.
Enable public sector end users to create a License or Permit request using Virtual Agent	Use Virtual Agent Designer to publish the pre-built conversation topic, **Start a License/ Permit Application**, which enables end users to submit a license or permit request using the Virtual Agent chatbot. For more information, see Configure Virtual Agent for License and Permit Playbook.
Automatically route license and permit requests using Advanced Work Assignment	Use the ServiceNow Advanced Work Assignment (AWA) application to route and assign license and permit requests to designated agents.
Configure License and Permit Eligibility Framework in License and Permit Playbook	Configure the pre-eligibility criteria to allow agents to confirm whether an applicant is eligible for the specific license or permit requested.
Configure decision tables for License and Permit Playbook	Use decisions tables to simplify the pricing configuration of a license or permit request that depends on multiple factors. Decision tables provide a single point where you can create, view, and modify pricing and dependent attributes.
Create Document Templates for License and Permit Playbook	Use the Document Templates application to generate templates for various types of Licenses and Permits issued through the License and Permit Playbook.

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Install License and Permit Playbook for Public Sector Digital Services

You can install the License and Permit Playbook application (sn_gsm_lic_prmt) if you have the admin role.The application includes demo data and installs related ServiceNow® Store applications and plug-ins if they aren't already installed.

Before you begin

- Ensure that the application and all of its associated ServiceNow Store applications have valid ServiceNow entitlements. For more information, see Get entitlement for a ServiceNow product or application.
- Certain features in the License and Permit Playbook application are available based on your ServiceNow entitlements and may require installation of other ServiceNow applications and activation of specific plug-ins.

  Note: Install the Playbooks for Customer Service Management application to enable the playbook experience.

- Review the License and Permit Playbook application listing in the ServiceNow Store for information on dependencies, licensing or subscription requirements, and release compatibility.

Role required: admin

About this task

The License and Permit Request [sn_gsm_license_permit_case] table is installed with License and Permit Playbook.

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the License and Permit Playbook application (sn_gsm_lic_prmt) using the filter criteria and search bar.

   You can search for the application by its name or ID. If you cannot find the application, you might have to request it from the ServiceNow Store.

   In the list next to the **Install** button, the versions available to you are displayed.
3. Select a version from the list and select **Install**.

   In the Review Installation Details dialog box, any dependencies installed with your application are listed.
4. If you're prompted, follow the links to the ServiceNow Store to get any additional entitlements for dependencies.
5. **Optional:** If demo data is available and you want to install it, select the **Load demo data** check box.
   Demo data are the sample records that describe application features for common use cases. Load the demo data when you first install the application on a development or test instance.
6. Select **Install**.

Configure Virtual Agent for License and Permit Playbook

The License and Permit Playbook includes Virtual Agent (VA) capabilities. Virtual Agent functionality allows constituents to serve themselves by engaging with a messaging interface, featuring pre-built conversations powered by artificial intelligence. Constituents can utilize the

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Virtual Agent to initiate new license/permit applications, access existing applications, check application status, and more.

Before you begin
Role required: admin

Procedure
1. Navigate to **All** > **Agent Chat** > **GSP Chat**, and set the status to **Active**.
2. Navigate to **All** > **Virtual Agent**.
3. Duplicate the **Prompt License/Permit**, **Update License/Permit Case**, and **Create License Permit Case** topic blocks.
4. Set the duplicated versions of the **Prompt License/Permit**, **Update License/Permit Case**, and **Create License Permit Case** topic blocks to **Active**.
5. Set the **Start a License Permit License Permit Application** topic block to active.
6. Open the duplicated version of the **Prompt License/Permit** topic block, and select the **License/Permit Products** component.
7. Modify the node name to the preferred text.
8. Select the script icon to open the editor.
9. Modify the table name to the preferred case type within the script.
10. Select **Save**.

Extend the License and Permit Base Case

As an admin, you can further extend the License and Permit install base case to define specific license/permit items received classes.

About this task
Licenses and permits are modeled as products, and for approved applications, the license or permit instances are generated and recorded in specific install base item extensions, referred to as Items Received. An admin may need to extend the base case in License and Permit Playbook to implement specific license and permit case application types with varying eligibility and application questions and combinations that may cause the License and Permit Case (sn_gsm_license_permit_case) table to extend beyond the 1000 column limit.

Before you begin
Select License and Permit Playbook as the application scope when prompted.

Role required: admin

Procedure
1. Review the legacy permit application's attributes and pre-determine the attributes to be created on the extended case type.
2. Navigate to **All** > **System Definition** > **Tables** and select **New**.
3. Enter the name of the license or permit for which new cases will be created.

   Note: The value in the Name field will be auto-populated based on the value entered in the Label field.

4. Select the License and Permit Case value in the Extends table field.

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5. Select **Application Access** and ensure the **Can read**, **Can create**, **Can update** and **Can delete** checkboxes are selected.
6. Select **Save** in the record header context menu.
7. Select **New** under the Columns tab to add additional fields relevant to the license/permit application.
8. Enter a value in the Column label field, and select options for the other column-level attributes.
9. On the form, fill in the fields, adding new columns for each question you wish to list on the license/permit application.

   For example, application questions on a commercial fishing permit would include a vessel name, the vessel's length, the boat registration number, the vessel's home port, etc.

   Note: Complex inputs such as lists of information can be captured in a JSON field in the case type extension, or in custom defined tables that reference to the case type extension.

10. Select **Update**.

Configure service definition catalog items for License and Permit Playbook application

Create a service definition for use with the License and Permit Playbook in Public Sector Digital Services.

Before you begin

Service definitions are records used to store details about a service that is available to end customers. You can create service definitions for each license/permit service offered by your government agency.

Important: After upgrade to Public Sector Digital Services v8.0, you will now be required to create a Service Definition for every previous Service Offered record. The deprecation of Services Offered means that Service Definitions now must be created for every Service that your agency offers. For more information, see Services Offered and Services Received Migration Guidance.

Role required: admin

Procedure

1. Navigate to **All** > **Service Catalog** > **Catalog Definitions** > **Maintain Categories** > **Licenses/ Permits**.
2. Select **Permits** or **Licenses**, depending on which category you wish to add a catalog item to.
3. **Optional:** Switch to the Public Sector Digital Services Core application, if prompted.
4. Under the Catalog item related list, select **New**.
5. On the form, fill in the fields.

Public Services Service Catalog form

Field	Description
Name	Name of the public service.
Catalog	Product category that the service falls under. If blank, select Government Service.

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Field	Description
Category	Indicates the type of public service. If blank, select either **Permits** or **Licenses**, depending on which category you wish to add a catalog item to.
Application	Application scope of the service. If blank, select License and Permit Playbook.
Status	Status of the public service. Mapped in the active field as: ○ Available = true ○ Not available = false
Short description	Short description of the public service.
Description	Description of the public service.

6. Select **Submit**.
   Your catalog item is created and ready for use by constituents submitting cases through the Government Service Portal, or agents creating a case from scratch in the CRM Workspace.

Configure License and Permit Eligibility Framework in License and Permit Playbook

The eligibility criteria in License and Permit Playbook allows an agent to confirm whether an applicant is eligible for the specific license or permit requested.

The License and Permit Playbook uses eligibility criteria, a series of questions posed to an applicant, to determine whether they are eligible to apply for a license or permit. Using a set eligibility criteria for applications routed through the License and Permit Playbook may aid in deflecting applications in which the applicant is not eligible to obtain a license or permit.

Pre-Eligibility criteria is established by performing the following activities:

1. Creating a Pre-Eligibility Decision Table. For more information, see Create a Pre-Eligibility Decision Table in License and Permit Playbook.
2. Updating the Public Sector Digital Services Pre-Eligibility Configuration decision table

For each new License & Permit product, a new pre-eligibility decision table must be created.

If the applicant fulfills all the eligibility criteria, then the agent can proceed in creating a case for the applicant. If the applicant does not fulfill at least one of the eligibility criteria, an agent cannot proceed in creating a case for the applicant.

Configure decision tables for License and Permit Playbook

Use decision tables to simplify the pricing configuration of a license or permit request that depends on multiple factors. Decision tables provide a single point where you can create, view, and modify pricing and dependent attributes.

In decision tables, each factor is a decision input. For example, if your agency is setting the price of a fishing permit, these inputs might include the location where the permit is being requested, the type of fish (one or multiple) that a fishing permit is being requested for, and the size of the fishing boat. Using a decision table can allow agents to present pricing and endorsements in a straightforward manner, even when it depends on multiple factors.

Create a Pre-Eligibility Decision Table in License and Permit Playbook

The License and Permit Playbook incorporates the use of pre-eligibility criteria, a series of questions that may be posed to an applicant to determine whether they are eligible to apply for a

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license/permit. This aims to deflect applications in which the applicant is not eligible to obtain a license/permit.

About this task
The Pre-Eligibility Configuration decision table is used to map pre-eligibility questions to a license/permit type.

Before you begin
Role required: admin

About this task
Pre-eligibility criteria is established by performing the following activities:

- Configuring a new pre-eligibility decision table
- Update the Public Sector Digital Services Pre-Eligibility Configuration decision table

Procedure
1. To configure a new pre-eligibility decision table, Navigate to **All** > **Workflow Studio**.
2. Select **New**.
3. Select **Decision Table**.
4. On the form, fill in the fields with the following information:

Field	Entry
Decision Table	Drivers License Pre-Eligibility
Application	License and Permit Playbook
Accessible from	All Application Scopes
Draft Authoring	Selected

5. Select **Build decision table**.
6. Select **Add an input**.
7. On the form, fill in the fields with the following information:

Field	Entry
Label	applicant_over_age_18
Type	String

8. Repeat steps 6-7 for all pre-eligibility questions that you wish to configure to appear on the first activity of the playbook.
9. Select **Add condition column**.

   Condition columns are conditions that are compared against the input values to determine the results of a decision table.

10. On the form, fill in the fields with the following information:

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Field	Entry
Condition Column Label	applicant_over_age_18
Input	applicant_over_age_18
Default Operator	**is**

Note:

By default, the operator is set to **is**, meaning an equal comparison of the values provided by the end user against the inputs configured in step 12 below. Other operators can be used depending on how the eligibility will be determined against the given input.

11. Select **Done**.
12. Select the field below the newly created condition column, and enter the value **Yes** or **No** depending on the expected response for eligibility.
13. Select the ⊕ icon and select **Add condition column**.
14. Repeat steps 10-13 for all input values that determine an applicant's eligibility.
15. Select the ⊕ icon and select **Add result column**.
16. On the form, fill in the fields with the following information:

Field	Entry
Result Column Label	Eligibility
Result Type	True/False

17. Select **Done**.
18. Set the Eligibility result field to be **True** if all conditions are met, and select **OK**.
19. Select **Save**, then select **Publish**.
20. Select **Publish** in the prompt.
    The status of your decision table should now be set to **Active**.
21. To update the Public Sector Digital Services pre-eligibility configuration decision table, navigate to **All** > **Workflow Studio**.
22. Select **Decision tables** > **Public Sector Digital Services Pre-Eligibility Configuration**.
23. Select **Create Draft** to edit the table.
24. Select the ⊕ icon to add a new decision row.

    This decision row maps the extended License & Permit case table with its corresponding Product Model, as well as the eligibility decision table that was created above.
25. On the form, fill in the fields with the following information:

Field	Entry	Description
Table	**sn_gsm_drivers_license_case** (or the name of the License	The column name (not the column label) for the

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Field	Entry	Description
	& Permit Table that was extended from the base case)	associated pre eligibility question that exists on the license and permit case table or extended table.
Product Model	Drivers License	Product model for the particular license/permit.
Description	Confirm the applicant's eligibility by answering the questions below.	The description that displays at the top of the pre-eligibility activity in the playbook.
Form Header		Shows a form header above the eligibility questions. Leave this field empty.
Error Header	Not eligible	Error header in the first playbook activity stating that the applicant is not eligible after clicking "Start Application".
Error Message	Each license/permit has certain criteria that must be met to apply. Review your answers to ensure accuracy.	Error message in the first playbook activity stating that the applicant is not eligible after clicking "Start Application".
Help URL	Link to a ServiceNow® Page	Presents a **Learn more** link within the error message if the applicant is found to be ineligible. The value in this field will be a link to a ServiceNow® page.
Eligibility	Drivers License Pre-Eligibility	The eligibility decision table created in the previous section for this particular product model. For example, Drivers License Pre-Eligibility.

26. Select **Save**, then select **Publish**.
27. Select **Publish** in the prompt.
    The status of your decision table should be set to **Active**.

Create a pricing configuration decision table for the License and Permit Playbook

The License and Permit Playbook uses decision tables to configure pricing.

About this task

In the License and Permit Playbook, pricing is established by the following:

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1. Determining the application endorsements on which fees will be based. For more information on adding pricing endorsement fields, see Add an endorsement field to a pricing configuration decision table in License and Permit Playbook.
2. Creating a decision table to capture the logic used to determine the fees charged.
3. Associating the newly created decision table to the license/permit cases. For information on how to associate a decision table with a license/permit case, see Associate a decision table with a License & Permit case type.

Each license/permit case references a specific decision table for pricing, which defines pricing based on the license/permit type and selected endorsements, and is unique to each extended License Permit Case Table.

Before you begin

Role required: admin

Procedure

1. Identify which table fields in the License and Permit record will affect the fee associated with the license or permit request.
   For example, each type of fish under the fishing permit record has a different fee associated with it. These are examples of table fields that affect the total fee associated with the permit request.
2. Navigate to **All** > **System Definition** > **Decision Tables**.
3. Select **New**.
4. Enter a name for the decision table, and ensure the application is set to License and Permit Playbook and that the table is accessible from **All Application Scopes**.
5. **Optional:** Enter a description.
6. Select **Build decision table**.
7. Select **Add** to add an input.
8. Create an input with **Case** as the label, **Reference** as the type, and **License & Permit case Extended Table** as the reference table.
9. Select **Add result column** to add the pricing column.
10. Set the column label to **Price**, and set the result type to **Currency**.
11. Select **Done**.
12. Select **Add condition column**.
13. Set the condition column label to **field**, the input to **Case**, and set the Data to evaluate to **Field**.
14. Select the dropdown menu under Field, and select the field that is associated with pricing.
15. Select **Done**.
16. Select **Add New Decision Row**.
17. Select the new table cell that was added under the Field label column and ensure the operator selected is **is**.
    If the field type is choice, the input value cannot be “None”. Select the appropriate choice input from the dropdown menu. If the field type is true/false, the input value should be **true**.
18. Select the new table cell that was added under the Price column, and enter the price associated with the field value.
    If the field type is **choice**, repeat steps 15-17 for each option of the choice.

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19. **Optional:** Select the plus icon that appears below Results, and choose **Add Condition Column** to add another pricing field.
    Repeat until all pricing fields or other endorsement fields are added. For more information on endorsements, see Pricing endorsements in License and Permit Playbook.
20. Select **Save** to save the decision table, then select **Publish**.

Result

The decision table is now created and can be associated with the License and Permit case type. For more information on how to do this, see Associate a decision table with a License & Permit case type.

As an admin, you can use a price adjustment definition to add adjustments to field prices based on the conditions of fields that are not price fields, such as residency status of the constituent for the location they are requesting in. For more information on how to add price adjustment definitions, see Add a price adjustment definition to a decision table in License and Permit Playbook.

Pricing endorsements in License and Permit Playbook

Pricing endorsements are selections made on an application that affect which fees are charged by a government agency to process and issue a license/permit.

Applicants can customize their permit by selecting one or more permit endorsements. Each endorsement represents a subtype of the main permit model, and are stored as fields in a License Permit extended table. Each endorsement maps to a specific fee in the Decision Table for Pricing.

Example of Endorsements for an Extended License Permit Case Type

An applicant can select as many endorsements as desired. Driver's license endorsements are special permissions added to a driver's license that allow the holder to operate specific types of vehicles or carry out specific driving-related tasks not covered under the standard license. The following table contains some examples of endorsements that can be added to the pricing decision table of a driver's license permit request case.

Endorsement	Description	Price (Can be set from Decision Table)
Hazardous Materials	Allows transport of hazardous materials	$5
Tank Vehicles	Permits operation of tank trucks carrying liquid or gas.	$5
Passenger Transport	Allows transportation of passengers	$5
School Bus	Allows operation of a school bus	$5
Double/Triple Trailers	Authorizes towing of double or triple trailers	$5
HazMat and Tank Vehicles	Combines both tank vehicles and hazardous materials endorsements	$5

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Add an endorsement field to a pricing configuration decision table in License and Permit Playbook

Pricing endorsements are selections made on an application that affect which fees are charged by a government agency to process and issue a license/permit. As an admin, you can add one or more pricing endorsements to an existing pricing configuration decision table.

Before you begin
Role required: admin

Procedure

1. Navigate to **All** > **System Definition** > **Tables**, and select the pricing decision table.
2. Select **New** to create a new field/column.
3. On the form, fill in the fields.
   In the **Type** field, enter **True/False**.
4. Select **Save**.

Result
The pricing endorsement is now created, and can be added as a condition in the pricing decision table.

Add a price adjustment definition to a decision table in License and Permit Playbook

As an admin, you can use a price adjustment definition in the License and Permit Playbook to add adjustments to field prices based on the conditions of fields that are not price fields, such as the residency status of the constituent for the location they are requesting the permit or license in.

Before you begin
Role required: admin

About this task
A base amount can be entered and saved for each license/permit option, and can be modified from its current value to a new value based on one or more control conditions. A price adjustment definition consists of only one price field, and as an admin, you can create multiple.

Procedure

1. Navigate to **All** > **System Definition** > **Decision Tables**, and open a decision table that has been associated with a License and Permit case type.
   For information on how to associate a decision table with the case type, see Associate a decision table with a License & Permit case type.
   You should be brought to Workflow Studio.
2. Select **Add condition column**.
3. Set the Input to **case**, and set Data to evaluate to **Field**.
4. Under Field, select the field that controls the pricing for the price adjustment in question.
5. Enter the name of the aforementioned field in the condition column label, and select **Done**.
6. Repeat steps 4-6 for all price control fields.
7. Select **Add new decision row**.
8. Select the newly added cell under any of the price control columns to add control conditions.
9. Specify the control condition for that field.
   If the field type is a choice, the input value cannot be “None”. Select the appropriate condition from the dropdown.

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10. Repeat steps 11-12 to add conditions for other control fields.
11. *If the price field where the adjustment applies is set to choice, enter the price choice affected.If the price field where the adjustment applies is not choice, set the value to true.*
12. Enter the adjustment price in the newly-added cell under the Price column, the price when those control conditions apply.
    If the price field is a Boolean, the value of the price field has to be set to **true**. If the price field is a choice, the value of the price field cannot be set to **none**. Enter the value of the adjustment price in the field.
13. Select **Save**, then **Close**.

Associate a decision table with a License & Permit case type

After you configure a pricing configuration decision table, associate it with the License & Permit case type to append pricing configurations to that case type table.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **System Definition** > **Decision Tables**.
   You should be brought to Workflow Studio.
2. Locate the pricing configuration decision table for the License and Permit case type, and right-click.
3. In the context menu, select **Copy sys_id**.
4. Open the **Public Sector Digital Service Endorsements Configuration** decision table and select **Create Draft**.
5. Select **Add new decision row** to add an entry for the pricing decision table.
6. On the form, fill in the fields with the following information:

Field	Entry	Description
Table	Child Table of License Permit	
Product Model	Product model for the particular license/permit.	
Endorsements Price Config Decision Table Sys Id	Paste the Sys Id of newly created pricing decision table.	
Endorsements Fields	Table Fields used as endorsements (separated by comma)	Shows a form header above the eligibility questions. Leave this field empty.
Benefit Summary Field	benefit_summary	This field is a column in License Permit Table that stores the endorsements and it's pricing in JSON format.
Endorsements Description	Description of the endorsement options available with the license/ permit request.	This text will be displayed to the user in the **Select endorsements** playbook activity.

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Field	Entry	Description
Fees Description	Description of the fee options associated with the license/ permit request.	This text will be displayed to the user in the **Select endorsements** playbook activity.
Options Text	Text to be displayed for Options.	This text will be displayed to the user in the **Select endorsements** playbook activity.
Fees Text	Text to be displayed for Fees.	This text will be displayed to the user in the **Select endorsements** playbook activity.

7. Select **Save**, then **Publish**.
8. Select **Publish** when prompted.

Result
The decision table is now associated with the License & Permit case type.

Create Document Templates for License and Permit Playbook

With the ServiceNow Document Templates application, you can create HTML and PDF document templates to generate standard letters or documents. You can automate and simplify the process of filling, signing, and reviewing a document online. Use the Document Templates application to generate templates for various types of Licenses and Permits that will be issued to applicants through the License and Permit Playbook.

About this task
By default, the License and Permit Playbook comes with a standard License and Permit document template, used for generating standard license or permit documents to be issued to the applicant via the Government Service Portal. Use the following steps to generate additional document templates for custom license and permit class types that fall outside of the standard, default template.

Before you begin
Role required: admin

Procedure
1. Navigate to **All** > **Document Templates** > **All Document Templates**.
2. Select **New**.
3. Select **PDF Document Template**.
4. On the form, fill in the fields:

PDF Template form

Field	Description
Name	Name of the PDF document template.
Table	Determines where the documents are attached. Select License and Permit Case [sn_gsm_license_permit_case] to map the generated PDF to the case.

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Field	Description
	Select License and Permit Install Base Item [sn_gsm_license_permit_install_base_item] to map the generated PDF fields to the Item Received.
Category	Document category in which the template is added. For License and Permit Playbook, select License and Permit.
Application	Scope of the application in which the document template is created.
State	Current state of the document template. ○ **Draft**: Indicates that the document template is not yet published. ○ **Editing**: Indicates that the document template is being edited after it has been published. ○ **Published**: Indicates that the document template can be consumed by services and cases.
User criteria	Audience criteria for this document. For example, you can create a permit intended for only Canadian residents. **Note:** When defining conditions like case sensitivity or null values, see API GlideFilter - Scoped, Global.
Start date	Date starting which the PDF document template is valid. **Start date** helps in maintaining multiple versions of same template. **Note:** Start date must be before the end date.
End date	Date until which the PDF document template is valid. **End date** helps in maintaining multiple versions of same template. By default, if values in **Start date** and **End date** are blank, it is implied that the template will always be valid. If you specify an end date, you must also specify a start date.
Template date format	Format in which you want the date to appear when an agent previews the document, or generates the attachment, or initiates document tasks for participants.

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Field	Description
	Note: ○ When signing using a ServiceNow application or the AdobeSign application: If no value is selected in **Template date format**, the value specified in the **template_date_format** system property is considered. If both **Template date format** and **template_date_format** system property are empty, the value in the Date format field from agent's user profile is considered. ○ When signing using the DocuSign application: The date format selected in Signing settings in the DocuSign application is considered over **Template date format** in the configured PDF template in a ServiceNow instance.
Template language	Language in which dynamic tokens are translated when an agent previews the document, or generates the attachment, or initiates document tasks for participants. **Note:** ○ Template language is a mandatory field. The default language is none. ○ Translation feature is available only when the language plug-ins are installed on the instance.
Signing type	Option to specify the application that is used for signing or filling the document. For example, ServiceNow Sign, DocuSign or AdobeSign. **Note:** Signing types are available only when respective integration plug-ins are installed.
Attachment type	Option to upload a new document or select a document from ServiceNow Managed Documents.
Document	Option to upload the attachment of a fillable PDF for further customization. **Note:** This field appears when **Upload new document** is selected in **Attachment type**.
Document revision	Option to select a document from ServiceNow Managed Documents. **Note:** This field appears when **Select from document revision** is selected in **Attachment type**.
Active	Option for enabling the PDF document template for use.
Acknowledgment text	Text that prompts the user to select a check box when submitting a filled document.

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Field	Description
Source template	Source template from which you created a copy of current template.

5. Select **Update**.

   You must map the newly created Document Template to the corresponding Install Base Item/Items Received extension table you wish to generate the license/permit in. This is accomplished by using Document Template Mapping in Decision Tables. By default, the default License and Permit Document Template, mapped to the License and Permit Install Base table, is used to generate a standard license/permit PDF document.

6. **Optional:** Select the **Parse PDF** related link to automatically parse information and fields from the PDF, and store that information in the PDF Mapping table for reuse.

   Note: **Parse PDF** appears only for an editable PDF.

   Using **Parse PDF** will allow each PDF field to be mapped to its corresponding Mapping Field in the License and Permit install base table.

7. **Optional:** In the **PDF Template Mappings** related list, define additional PDF field mappings.

   Note: The **PDF Template Mappings** related list is only available for an editable PDF. See Define a PDF field mapping for more information.

8. Navigate to **Decision Management** > **Decision Builder**.
9. Open the **Document Template Mapping** table.
10. On the form, fill in the fields to add additional decision rows to configure additional Document Templates.

Document Template Mapping form

Field	Description
Document Template Category	Use this field to have multiple templates for a single Install Base Item Table. For example, you may enter **License and Permit** as the Document Template Category to map Document Templates that are different from the default template to the License and Permit category.
Table Name	Select the table that should map to the document template. For a license/permit that is to be issued to an applicant at the end of the application process, select the License and Permit install base item table (sn_gsm_license_permit_install_base_item).
Document Template	Indicate what Document Template will be used for the document template category and table name. Select the Document Template that was created in steps 3-5.
isPdfTemplate	Select **(value = true)** if the Document Template selected is a PDF template. Select **(value = false)** if the Document Template selected is an HTML template.

11. Select **Submit** or **Save**.
12. **Optional:** Open the **Install Base Item Table Mapping** table.

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13. **Optional:** On the form, fill in the fields to configure the table in which an install base item (the license/permit that is to be issued to an applicant at the end of the application process) should be created.

    (Optional) By default, this is the License and Permit case table (sn_gsm_license_permit_case).

Install Base Item Table Mapping form

Field	Description
Table Name	Select the case table where the License and Permit request will be created. By default, this is the License and Permit case table (sn_gsm_license_permit_case).
Document Template	Indicate what Document Template will be used for the document template category and table name. Select the Document Template that was created in steps 3-5.

14. **Optional:** Select **Submit** or **Save**.

Result
After the agent makes a decision in the **Propose decision** activity of the License and Permit Playbook, the PDF generated by the Document Template is created. An agent will be able to view the generated PDFin the **Create License/Permit** activity in the **Decision** stage, and the applicant will be able to view the PDF in the portal.

Define a Product Model for License and Permit Playbook

A product model record is required in a license/permit case application.

Before you begin
Role required: admin

About this task
For a license/permit case, a product model is used to represent a specific type of license/permit. Having a specific product model can help support multiple aspects of the permitting process implementation, such as defining the product, associating multiple services with it, delivering specific product instances, enabling additional workflows, etc.

Additional fields to describe the permit product can be added if required. For example, for a drivers license, you may add a choice field for license class with choices A, B, or C, then create three records, one per class. For a commercial fishing permit, you may add a field that captures whether or not a boat inspection is required before the permit can be granted.

If there are multiple types of permits with unrelated fields, you can extend specific product model classes from the permit model base class. For example, if your agency offers bird taxidermy and wildlife import/export permits out of the same organization, consider whether you need specific permit model classes that would help define different attributes on each permit product.

Procedure
1. Navigate to **All** > **Constituent Service** > **Products** > **Permit Models**.
2. Select **New**.
3. Select **Form Header** > **Configure** > **Form Layout**.
4. Select **Edit this section in Expanded Model and Asset Classes**.
5. Select the checkbox next to the **Cost** and **Customer Visible** fields.

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These fields must be set to true in order for the constituent or businesses contact to determine their pre-eligibility.

6. Add any additional fields to collect additional information from the user for the permit model. For example, for a commercial fishing permit, you may add a field that captures whether or not a boat inspection is required before the permit can be granted.
7. On the Configuring Permit model form, fill in the fields.
8. Select **Submit**.

Configuring Playbooks-on-portal for a custom case type

As an admin, you can configure the playbooks-on-portal experience for a custom case type that extends the base License and Permit case.

Before you begin

Role required: admin

About this task

Admins can create variants of the License & Permit Playbook process to use for a custom case type.

Procedure

1. Duplicate the playbook process by navigating to **All** > **Process Automation** > **Workflow Studio**.
2. In the Playbooks list, select the **Licenses/Permits Playbook**.
3. Select the More Actions (...) menu and select **Duplicate**.
4. Fill in the **Label** field with the desired name for the playbook and add a description. The trigger type should be **Record Create**.
5. Select **Duplicate**.
6. Modify the playbook for the particular license use case, then select **Activate**.
7. Navigate to **All** > **Record Generators**.
8. Select **New**.
9. On the form, fill in the fields with the following:

Field	Entry
Table	License and Permit Case, or the extended License and Permit table. This is the table the record generator will trigger for.
Process Definition	Name of the playbook created in the previous section.
Create Record Activity Name	Answer Eligibility Questions. This is the first activity in the Playbook.
Create Record Form View	LicensePermitRecordGenerator
Template Fields: Product	Drivers License
Template Fields: Service	Driver's license – New Request

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10. Select **Submit**.
11. Navigate to **All** > **Customer Service** > **Administration** > **Service Definitions**.
12. Select **Drivers License – New Request** service definition.
13. Select the search icon next to the Playbook record generator.
14. Select the magnifying glass icon to open the list of playbook record generators, and select the previously-created playbook record generator for the extended case type.
15. In a new window, navigate to **All** > **Playbook Experience** > **Playbook Content Items**.
16. Select **New**.
17. On the form, fill in the fields with the following information:

Field	Entry
Name	Driver license application
Catalogs	Government Services
Category	Licenses
Short Description	Application for an individual to obtain permission to legally operate a motor vehicle on any road, freeway, or other way accessible to the public.
Table	Select the **License and Permit Case (OR the extended table created** table.
Playbook Experience	CSM Configurable Workspace
Playbook Experience Record Generator	Previously-created Record Generator
Portal Page	GSM Intake
Title	Drivers License Application

18. Select **Submit**.
19. Select the newly created Playbook Content Item.
20. Select **Edit** in the **Available For** related list.
21. Select **SNC External** from the Collections dropdown, and add it to the Available List.
22. Select **Save**.
23. Select the **Not Available For** related list, then select **Edit**.
24. Select **SNC External** and add it to the collection.
25. Select **Save**.
26. Verify the playbook content item you created displays under **Services** > **Licenses/Permits** on the Government Service Portal.

Install and configure the Information Request Administration application

Install the Information Request Administration application, which enables public sector end users to submit and track public record requests and provides government agents with a pre-defined process for handling and resolving these requests. You can then configure the features available for submitting requests and routing requests to agents.

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As a user with the admin role, complete the following configuration tasks to set up the Information Request Administration, after you install the Public Sector Digital Services Core application.

Configuration Tasks for Information Request Administration

Task	Description
Install Information Request Administration for Public Sector Digital Services	Install Information Request Administration (com.sn_public_sector_digital_services_core) from the ServiceNow® Store.
Automatically route service requests using Advanced Work Assignment	Use the ServiceNow Advanced Work Assignment (AWA) application to route and assign public sector information requests to designated agents.
Configure Restricted Caller Access (RCA) privilege settings	You can use a requested RCA to grant store apps access to protected resources in the ServiceNow AI Platform® without the need to wait for the next family release. If you have the system admin or application admin role, you can review requested RCAs and approve and deny them.
#unique_216	Create a legal, review, or final review assignment agent group for the final review steps of an Information Request.
Configure the Manage documents activity UI in Information Request Administration	Create documents, search for documents with the auto-complete name lookup, and link or unlink existing documents to a case, all from one modal within the playbook.
Configure Similar Request Documents UI in Information Request Administration	Search documents from similar cases, preview multiple sets of documents at one time, and link or unlink documents to or from the case from one modal, without having to leave the playbook.
Configure Mobile Agent for Information Request Administration	(Optional) Install the Customer Service Mobile and Information Request Administration plugins to enable agents to view and track information requests on the Mobile Agent.

Install Information Request Administration for Public Sector Digital Services

You can install the Information Request Administration application (sn_gsm_info_req) if you have the admin role.The application includes demo data and installs related ServiceNow® Store applications and plugins if they aren't already installed.

Before you begin

- Ensure that the application and all of its associated ServiceNow Store applications have valid ServiceNow entitlements. For more information, see Get entitlement for a ServiceNow product or application.
- Certain features in the Information Request Administration application are available based on your ServiceNow entitlements and may require installation of other ServiceNow applications and activation of specific plugins.

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Note: Install the Playbooks for Customer Service Management application to enable the playbook experience.

- Review the Information Request Playbook application listing in the ServiceNow Store for information on dependencies, licensing or subscription requirements, and release compatibility.

Role required: admin

About this task

The Information Request [sn_gsm_information_request] table is installed with Information Request Administration.

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the Information Request Administration application (sn_gsm_info_req) using the filter criteria and search bar.

   You can search for the application by its name or ID. If you cannot find the application, you might have to request it from the ServiceNow Store.

   In the list next to the **Install** button, the versions available to you are displayed.
3. Select a version from the list and select **Install**.

   In the Review Installation Details dialog box, any dependencies installed with your application are listed.
4. If you're prompted, follow the links to the ServiceNow Store to get any additional entitlements for dependencies.
5. **Optional:** If demo data is available and you want to install it, select the **Load demo data** check box.
   Demo data are the sample records that describe application features for common use cases. Load the demo data when you first install the application on a development or test instance.
6. Select **Install**.

Configure Restricted Caller Access (RCA) privilege settings

Define cross-scope access to an application, application resource (such as an access control role, a business rule, a UI action, or a script include), or event. You can use a requested RCA to grant store apps access to protected resources in the ServiceNow AI Platform without the need to wait for the next family release.

About this task

If you have the system admin or application admin role, you can review requested RCAs and approve and deny them. You can even use these settings to allow or deny requests for access.

Before you begin

Role required: admin

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Procedure

1. Navigate to **All** > **Case Types** > **Manage Case Types**.
2. Validate there is a record for Information Request and the short description is 'Manage requests for FOIA/public records.
3. Create a case from a list in Workspace and validate the fields are populated correctly.

Configure the Manage documents activity UI in Information Request Administration

Configure the Manage Documents activity UI in Information Request Administration to allow agents to view, link, or unlink documents to an information request case.

Before you begin

This task requires the Document Management [com.snc.platform_document_management] plugin to be active on your instance. If Document Management [com.snc.platform_document_management] is not active on your instance, see Activate a plugin for instructions.

Role required: admin

Procedure

1. Navigate to **All** > **Process Automation** > *Workflow Studio*.
2. Select **Information Request**.
3. Under Intake, select **Add Activity**.
4. Select **Playbooks for Customer Service Management** > **Manage Documents List**.
5. Select the edit button, and rename the action to **Manage Documents**.
6. Under When to Start, select **Immediately**.
7. Select **View All Properties** to set the trigger and edit other configurations.
8. In the top right corner of the screen, select the Advanced button to toggle it on. The Experience tab should now display.
9. Select **Automation**.
10. Under Record, select **Trigger- Information Request** > **Information Request Record**.
11. Under Conditions, select **State Is New**, then select Done.
12. Select Experience.
13. Under Associated table, select **Information Request**, and under Associated Record, select **Trigger- Information Request** > **Information Request Record**.
14. Under Title, select **This Activity** > **Label**.
15. Select **Done**, then **Activate**.

Result

The Manage Documents UI activity is now configured, and the modal should now display when you open a new or existing Information Request Administration.

Configure Similar Request Documents UI in Information Request Administration

The Similar Request Documents Activity UI uses the name and description of existing information request cases to display a list of documents associated with the current case, providing helpful information the documents used to resolve similar information requests in Information Request Administration.

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Before you begin
Role required: admin

Procedure
1. Navigate to **All** > **Process Automation** > *Workflow Studio*.
2. Select **Information Request**.
3. Under Intake, select **Add Activity**.
4. Select**Playbooks for Customer Service Management** > **Similar Documents**.
5. Select the edit button, and rename **Similar Documents** to **Similar Request Documents**.
6. Under When to Start, select **Immediately**.
7. Select **View All Properties** to set the trigger and edit other configurations.
8. In the top right corner of the screen, select the Advanced button to toggle it on.
   The Experience tab should now display.
9. Select **Automation**.
10. Under Record, select **Trigger- Information Request** > **Information Request Record**.
11. Under Conditions, select **State Is New**.
12. Select the Experience tab.
13. Under Associated table, select **Information Request**, and under Associated Record, select **Trigger- Information Request** > **Information Request Record**.
14. Under Related Record Encoded Query, enter**state=3**.
15. Under Title, select **This Activity** > **Label**.
16. Select **Done**, then **Activate**.

Result
The Similar Documents UI activity is now configured, and the modal should now display when you open a new or existing Information Request Administration.

Install and configure the Service Request Playbook application

Install the Service Request Playbook application, which enables public sector users to submit and track non-emergency service requests, and provides government agents with a process for handling these requests. You can then configure the features available for submitting requests and routing requests to agents.

As a user with the admin role, complete the following configuration tasks to set up the Service Request Playbook, after you install the Public Sector Digital Services Core application.

Configuration tasks for Service Request Playbook

Task	Description
Install Service Request Playbook application	Install Service Request Playbook (com.sn_public_sector_digital_services_core) from the ServiceNow® Store.
Automatically route service requests using Advanced Work Assignment	Use the ServiceNow Advanced Work Assignment (AWA) application to route and assign public sector service requests to designated agents.

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Configuration tasks for Service Request Playbook (continued)

Task	Description
Configure Engagement Messenger for Playbooks	Configure certain Engagement Messenger settings that enable public sector end users to create and track non-emergency service requests from Engagement Messenger.
Enable public sector end users to create a service request using Virtual Agent	Use Virtual Agent Designer to publish the prebuilt conversation topic, **Create a Service Request**, which enables end users to submit a service request using the Virtual Agent chatbot.
Configure the Similar Records Activity UI in Service Request Playbook	View a list of similar requests by location, without having to search for the requests or leave the playbook.
Configure Mobile Agent for Service Request Playbook	(Optional) Install the Customer Service Mobile and Service Request Playbook plugins to enable government service agents to track non-emergency service requests on the Mobile Agent.

Install Service Request Playbook for Public Sector Digital Services

If you have the admin role, you can install the Service Request Playbook application (sn_gsm_srvc_req).The application includes demo data and installs any related ServiceNow® Store applications and plugins that aren't already installed.

Before you begin

- Ensure that the application and all of its associated ServiceNow Store applications have valid ServiceNow entitlements. For more information, see Get entitlement for a ServiceNow product or application.
- Certain features in the Service Request Playbook application are available based on your ServiceNow entitlements and might require installation of other ServiceNow applications and activation of specific plugins.

  Note: Install the Playbooks for Customer Service Management application to enable the playbook experience.

- Review the Service Request Playbook application listing in the ServiceNow Store for information on dependencies, licensing or subscription requirements, and release compatibility.

Role required: admin

About this task

The Service Request [sn_gsm_service_request_case] table is installed with Service Request Playbook.

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the Service Request Playbook application (sn_gsm_srvc_req) using the filter criteria and search bar.

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You can search for the application by its name or ID. If you can't find the application, you might have to request it from the ServiceNow Store.

In the list next to the **Install** button, the available versions are displayed.

3. Select a version from the list and select **Install**.

   In the Review Installation Details dialog box, any dependencies installed with your application are listed.

4. If you're prompted, follow the links to the ServiceNow Store to get any additional entitlements for dependencies.
5. **Optional:** If demo data is available and you want to install it, select the **Load demo data** check box.
   Demo data are the sample records that describe application features for common use cases. Load the demo data when you first install the application on a development or test instance.
6. Select **Install**.

Configure a service definition for Playbooks in Public Sector Digital Services

Create a service definition for use with Playbooks in Public Sector Digital Services.

Before you begin

Role required: admin

About this task

Service definitions are records used to store details about a service that is available to end customers. You can create service definitions for each public service offered by your government agency.

After upgrade to Public Sector Digital Services v8.0, Services Offered, an extension of Product Model, will no longer be used to model government services. Services Received, an extension of Sold Product, will no longer be used to model the government services that have been granted/delivered to constituents. The Service Definition table will be used to model all public services offered by governments. The following fields from the Service Offered table will be removed and replaced with Service Model fields:

- Type
- Status
- Number
- Period Start Date
- Period End Date
- Jurisdiction
- Category
- Subcategory
- Payment source

Important: When upgrading to Vancouver, any data in the Services Offered and Services Received tables will need to be manually migrated into the Service Definition table. You can do so by creating a Service Definition for each entry in the Services Offered table. Services Offered and Services Received data will not be accessible within the application until this step is completed. This is an optional task for previous releases.

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Procedure

1. Navigate to **All** > **Customer Service** > **Administration** > **Service Definitions**.
2. Select **New**.
3. Enter the details for the Service Definition.

Service definition form

Field	Description
Name	Name of the service definition.
ID	System-generated unique identifier for the service definition.
Table	Table associated with the service definition. Select a case or task table based on the service.
Customer service type	Select a service type for the service definition.
Playbook record generator	Select a playbook record generator.
Service Organizations offering Service	Service that the service organizations provide.
Order	The order in which the case type appears in the interceptor.
Active	Check box to activate or deactivate the service organization criteria.
Description	Description of the service definition.

4. Select **Submit** or **Update**.
5. Select the new Service Definition Record.
6. In the Default Table Values field, select **Service Definition**.
7. Select the search icon , and select the new Service definition in the choice menu.
8. Select **Submit**.
   The service definition is now created and can be used with any of the playbooks in Public Sector Digital Services.

Configure a custom playbook in Service Request Playbook

Custom playbooks and service definitions enable you to customize the default Service Request Playbook user experience to interact with your desired agency workflows. After creating a service definition, you can associate a playbook with the definition.

Before you begin

Role required: admin

About this task

Before starting this procedure, you must create a service definition to associate your playbook with. For more information on how to create a service definition, see Configure a service definition for Playbooks in Public Sector Digital Services.

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When the agent selects **Create Case** on the case type selector screen, the system displays the new case record and launches the playbook associated with the service in a tab on the record page.

Note: This is an optional task.

Procedure

1. Navigate to **All** > **Process Automation** > *Workflow Studio*.
2. Select **Create a New Process**, fill in the details of the playbook, and select **Select a trigger**.
3. Select a trigger type from the dropdown menu.
   Your trigger type is the service definition you recently created.
4. Select **Go to Designer**.
   Workflow Studio is now opened.
5. Select **Activate** after creating the process to your specifications.
   The playbook is now published to run when triggered.
6. Navigate to **All** > **System UI** > **UI Policies**.
   You are taken to edit the UI of the Playbook Record Generator, which is the initial form an agent sees when they are creating a case.
7. Select **New**.
8. Select **Service Request** in the **Table** dropdown menu, and enter a short description describing your new UI policy.
9. Add the necessary conditions under the **When to Apply** and **Script**tabs,and select **Submit**.
   Your UI policy and playbook are now created.

Configure the Similar Records Activity UI in Service Request Playbook

The Similar Records Activity UI uses the name and description of existing cases to display a list of cases associated with the current case, allowing an agent to determine whether the current case is a duplicate of an existing case. Similar records can also provide helpful information about a current case.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **Process Automation** > *Workflow Studio*.
2. Select **Service Request**.
3. Under Intake, select **Add Activity**.
4. Select**Playbooks for Customer Service Management** > **Similar Records**
5. Under When to Start, select **With Previous** from the dropdown.
6. Select **View all properties**, then **Automation**.
7. Select the arrow next to Record, and select **Trigger- Service Request** > **Service Request Record**.
8. Under Conditions, select **Stage** > **is not** > **Intake**.
9. Toggle **Advanced** in the top right corner of the screen.
10. Select **Experience**, and set the associated table to "Service Request".
11. Set the associated record to **Trigger- Service Request** > **Service Request Record**

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12. **Optional:** To set parameters for.
13. Set the title to **This activity** > **Label**.
14. Select **Done**, then select **Activate**.

Result

The Similar Records UI activity is now configured, and the modal should now display when you open a new or existing Service Request Playbook.

Configure agent tools in Public Sector Digital Services

Configure other agent tools such as Mobile Agent.

Configure Mobile Agent for Public Sector Digital Services

Configure Mobile Agent for the Information Request and Service Request Playbooks.

Configure Mobile Agent for Information Request Administration

Install the Customer Service Mobile and Information Request Administration plugins to enable government agents to track public record information requests on the Mobile Agent. You can then configure the roles.

As an admin, complete the following configuration tasks to set up the Mobile Agent application.

Admin Tasks for Mobile Agent app configuration

Task	Description
Install Information Request Playbook application	Install Information Request Administration (com.sn_public_sector_digital_services_core) from the ServiceNow® Store.
Activate the Customer Service Mobile plugin (com.sn_csm_mobile)	You can activate the Customer Service Mobile plugin (com.sn_csm_mobile) using the Customer Service Management guided setup.
Configure public sector roles and permissions for Mobile Agent app	Configure user roles in order for government agents to access the Mobile Agent app. This step is mandatory for any government agent to be able to work from the app.

Once the Customer Service Management mobile application is activated and configured, agents can download the ServiceNow Mobile Agent on their mobile devices and access ServiceNow instances.

Configure Mobile Agent for Service Request Playbook

Install the Customer Service Mobile and Service Request Playbook plugins to enable government service agents to track non-emergency service requests on the Mobile Agent. You can then configure the roles.

As a user with the admin role, complete the following configuration tasks to set up the Mobile Agent application.

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Admin Tasks for Mobile Agent app configuration

Task	Description
Install Service Request Playbook application	Install Service Request Playbook (sn_gsm) from the ServiceNow® Store.
Activate the Customer Service Mobile plugin (com.sn_csm_mobile)	You can activate the Customer Service Mobile plugin (com.sn_csm_mobile) using the Customer Service Management guided setup.
(Optional) Activate Field Service Management plugin (com.snc.work_management)	Install the Field Service Management plugin to view the work orders related list. For more information, see Integration with Field Service Management.
Configure public sector roles and permissions for Mobile Agent app	Configure user roles in order for government service agents to access the Mobile Agent app. This step is mandatory for any government service agent to be able to work from the app.

Once the Customer Service Management mobile application is activated and configured, agents can download the ServiceNow Mobile Agent on their mobile devices and access ServiceNow instances.

Configure public sector roles and permissions for Mobile Agent app

Configure user roles for government service agents to access the Mobile Agent app. This step is mandatory for any government service agent to be able to work from the app.

Before you begin

Role required: admin

Procedure

1. In the navigation filter, enter **sys_sg_applet_launcher.list** to open the Applet Launchers [sys_sg_applet_launcher] table.
2. From the Launcher screens table, select the **Cases** record.
   The Required Roles record should contain only the Customer Service Agent (sn_customerservice_agent) role.
3. **Optional:** If prompted, switch from the Global application to the Customer Service Mobile application.
4. Select the edit icon ( ) under Required Roles and add the following roles:
   - sn_gsm.agency_manager
   - sn_gsm.government_service_manager
   - sn_gsm.constituent_agent
   - sn_gsm.business_agent
   - sn_gsm.agency_constituent_agent
   - sn_gsm.agency_agent

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5. Select **Done** to save the roles.
   Agents with the above roles can now log in to the Mobile Agent and work on Service Request cases assigned to them.

Configure communication channels in Public Sector Digital Services

Configure communication channels such as chat, email, phone, virtual agent, and engagement messenger.

Virtual Agent	Engagement Messenger
	
Set up Virtual Agent to use the predefined Virtual Agent topics (chatbot conversations) designed to help constituents complete common self-service tasks.	Set up Engagement Messenger to enable your users to find the information or service that they need from third-party web applications.

Configure Virtual Agent for Public Sector Digital Services

Set up ServiceNow® Virtual Agent so that conversation designers (topic authors) can create and modify automated conversations for public sector use cases. Virtual Agent for Public Sector Digital Services also helps your constituents complete common self-service tasks on the Government Service Portal with predefined Government Service Virtual Agent topics (chatbot conversations).

Note: The Virtual Agent plugin (com.glide.cs.chatbot) must be activated.

What to do before building Virtual Agent topics for public sector use cases

As admins or topic authors (users with the virtual_agent_admin role), you can do the following with Virtual Agent:

- Use prebuilt conversations and topic blocks (components that run subflows or common functions in a conversation). Prebuilt conversations and topic blocks are available with the Virtual Agent platform, Customer Service Virtual Agent Conversations plugin (com.sn_csm.virtualagent), and Service Request Playbook application. Prebuilt Public Sector topic blocks are available with the Public Sector Digital Services Core application.
- Build your own custom, public sector conversation topics. You can duplicate prebuilt topics and topic blocks and then customize them as needed.

Before you or your topic authors (users with the virtual_agent_admin role) create or modify Virtual Agent conversations, meet the following prerequisites for working with prebuilt topics and topic blocks in Virtual Agent Designer:

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- Activate the Glide Virtual Agent plugin (com.glide.cs.chatbot) to access platform topics and topic blocks and run Virtual Agent Designer.
- Activate the Customer Service Virtual Agent plugin (com.sn_csm.virtualagent) to access prebuilt Customer Service Management conversations and topic blocks.
- Become familiar with Virtual Agent Designer to create and update conversation topics.
- Install Public Sector Digital Services Core application to access public sector topic blocks that can be used in public sector conversations.
- Install Service Request Playbook for Public Sector Digital Services to access the prebuilt topic, **Create a Service Request**.
- Install License and Permit Playbook for Public Sector Digital Services to access the prebuilt topic, **Start a License/Permit Application**.

Configure Virtual Agent conversations for public sector users

As admins or topic authors (users with the virtual_agent_admin role), you can deploy prebuilt conversation topics to your end users, such as the **Create a Service Request** topic provided with the Service Request Playbook application, as well as custom conversation topics that you create.

These blocks are subflows that run conversational elements or common tasks in a conversation, such as adding or retrieving records. Topic blocks enable topic authors to add standard functions to Virtual Agent conversations, simplifying conversation design and maintenance.

1. Configure Agent Chat in the Government Service Portal.
   a. Navigate to **All** >**Service Portal** >**Agent Chat**.
   b. Locate **GSP Chat**, and select the check box to set the record to **Active**.
2. In Virtual Agent Designer, search for the corresponding topic block.
   - For Service Request Playbook requests, search for and select **Create a Service Request**.
   - For License and Permit Playbook requests, search for and select **Start a License/Permit Application**. For more information, see Configure Virtual Agent for License and Permit Playbook.
3. Select **Publish** to set the topic block to Active and make it available to your end users. For more information on creating and publishing Virtual Agent topics, see Publish a Virtual Agent topic.

For more information on working with topics in Virtual Agent Designer, see Getting Started with Virtual Agent Designer.

Example Virtual Agent topics

The Public Sector Digital Services Core application provides several base system topic blocks that you can use in public sector conversations:

- Prompt Service for Constituent – Asks constituents to select a type of government service.
- Create Public Sector Additional Members – Prompts constituents to add other persons who have an authorized interest in an issue or case.

Prompt Service for Constituent topic block

Use this topic block in a conversation to ask constituents to select a service from a list of available government services, for example permits or licenses. Activate the Customer Service Virtual Agent Conversations (com.sn_csm.virtualagent) plugin to use this topic block.

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Create Public Sector Additional Members topic block

Use this topic block to let your constituents specify other people, such as family members or other authorized individuals, who can view a case or issue. Activate the Customer Service Virtual Agent Conversations (com.sn_csm.virtualagent) plugin to use this topic block.

When you use this topic block in a conversation, you specify the input parameters from the originating (calling) topic to the topic block.

Public Sector Additional Members input parameters

Parameter	Description
case_id	Sys_id of the public sector case record created.
case_type	Extension of the base public sector service.

To learn more about topic blocks and how to use them in Virtual Agent conversations, see Maximizing code reuse with topic blocks.

Configure Engagement Messenger for Playbooks

Configure certain Engagement Messenger settings to enable public sector end users to create and track requests. With Engagement Messenger, public sector users can access self-service and chat features from third-party web applications outside of the ServiceNow environment.

- Create an Engagement Messenger module. For more information on implementing Engagement Messenger, see Set up Engagement Messenger.
- Be familiar with customizing the Engagement Messenger module. For details, see Customize the feature configuration of Engagement Messenger.
- Activate the Agent Chat plugin (com.glide.interaction.awa).
- Activate the Virtual Agent plugin (com.glide.cs.chatbot), which requires a subscription.
- Activate the Customer Service Virtual Agent Conversations plugin (com.sn_csm.virtualagent), which requires a subscription.

Configure Engagement Messenger for Service Request Playbook

Configure Engagement Messenger settings for creating and tracking non-emergency service requests.

Before you begin

Role required: sn_csm_ec.ec_admin or admin

About this task

Public sector end users can create and track service requests in Engagement Messenger. They can choose from a catalog of pre-packaged service requests that are provided with the Service Request Playbook application. If Virtual Agent is implemented, they can use the pre-built Virtual Agent conversation, Create a Service Request, to submit and update non-emergency service requests from Engagement Messenger. You must enable the Government Service Catalog and this pre-built Virtual Agent conversation in Engagement Messenger.

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Procedure

1. In Engagement Messenger, navigate to **All** > **Engagement Messenger** > **Modules**.
2. Customize the Catalog feature to use the Government Service Catalog, which provides the pre-packaged, non-emergency services that users can select from when creating a service request.
   a. From the **Features** section, open the **Catalog** feature.
   b. Select **Edit** to search for and then add the Government Service Catalog.
3. Customize the Chat feature by enabling the pre-built Virtual Agent conversation for creating a service request.
   a. From the **Features** section, open the **Chat** feature.
   b. Under **Reference chat**, find and select the **Create a Service Request** conversation topic.
4. Select **Update**.

Implement intelligence in Public Sector Digital Services

Integrate intelligence features to automate routine tasks and provide relevant content.

ServiceNow Otto for Public Sector Digital Services (PSDS)



Use ServiceNow Otto for PSDS to enhance user productivity and efficiency through conversation and proactive experiences using generative AI.

ServiceNow Otto for Public Sector Digital Services (PSDS)

Use the Public Sector Digital Services to boost productivity and efficiency with generative AI. This tool enhances user interactions by summarizing case information, generating resolution notes, and providing chat summaries. It also helps you quickly understand chat and case context, enabling faster and more accurate customer resolutions.

Configure AI Agents for Public Sector Digital Services

Configure the AI Agents to execute use cases and complete tasks autonomously in Public Sector Digital Services.

Before you begin

Role required: admin, sn_aia_trigger_configuration

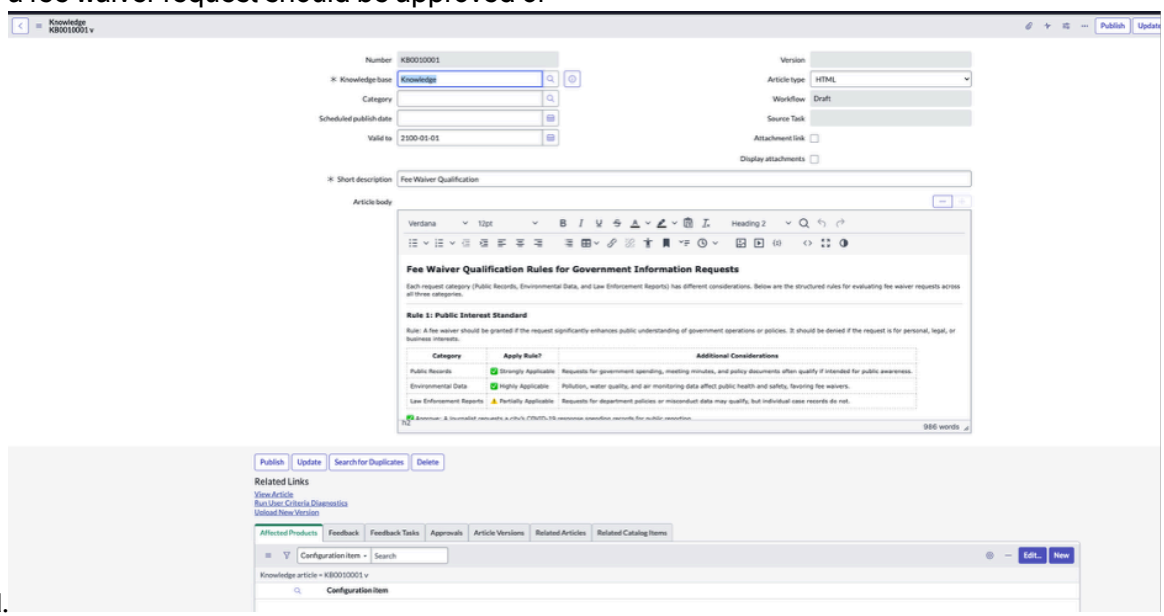
About this task

To get started with AI Agents, you must have the sn_gsm_ai_agents plugin installed, and the ServiceNow Otto panel and AI Search enabled on your instance.

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Procedure

1. Confirm that the ServiceNow Otto Panel and AI Search module are both enabled.
   For instructions on how to enable the ServiceNow Otto panel and on how to set up AI Search, see Configure ServiceNow Otto for Public Sector Digital Services (PSDS) and Configure AI Search for ServiceNow Otto for Public Sector Digital Services (PSDS).
2. Navigate to **All** > **AI Search** > **Indexed Sources.**.
3. Locate the Information Request Table and select the record.
4. Select **Index All Tables** to start the indexing process.
5. Select **Indexing History** once it is completed to confirm the Keyword Ingestion State has changed from Indexing to Indexed.
6. Select **Publish** to publish the search source for the Information Request table.
7. Create a KB article that will contain the criteria for determining whether a fee waiver request should be approved or rejected.



   The KB article must have a unique name and number.
8. Navigate to **All** > **AI Agent Studio** > **Create and Manage**.
9. Select **Information Request Playbook Fee Estimation Agent**.
10. Select **Define trigger**, and select **Information Request Fee Estimation and Review Trigger**.
11. Set the trigger to **Active**, and select **Save**, then **Continue**.

    Note: By default, the trigger is set to active.

12. Set Display to **Active**, then select **Save and Test**.

Result

The agentic workflow is now active. On this page, you can run a one-time test of the AI agent or agentic workflow to see how it thinks through the given task.

Set up constituent self-service in Public Sector Digital Services

Creating a self-service portal such as the Government Service Portal helps constituents submit requests independently. You can integrate features like knowledge bases, chatbots, and appointment booking for easy access to information.

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Government Service Portal Government Service Portal	Service catalog	GOV.UK Design System Service Portal
		
Set up the Government Service Portals to provide information and support to your constituents.	Create service catalogs to provide your customers with self-service opportunities to request items such as service and product offerings.	Configure the GOV.UK Developer Toolkit, a library of reusable portal widgets that enable developers to build service portals for UK constituents.

Configure the GOV.UK Design System Service Portal theme

Create and enable self-service portals that adhere to design patterns set forth by the GOV.UK Design System. Choose from a library of reusable portal widgets to build service portals for UK constituents. Integrate these portals with knowledge bases, communities, service catalogs, and chatbots. Additionally, provide features like walk-up experiences and appointment booking to enhance their self-service options.

Government Service Portal

Create and enable self-service portals for your customers to support their needs efficiently. Integrate these portals with knowledge bases, communities, service catalogs, and chatbots. Additionally, provide features like walk-up experiences and appointment booking to enhance their self-service options.

Service Catalog

Use the Service Catalog application to create and customize service catalogs so that your constituents can request items such as services and public records, or submit applications for grants or various social benefit programs. Additionally, you can standardize request fulfillment to maintain the accuracy and availability of the items in the catalogs.

Customize the Government Service Portal

Modify the Government Service Portal to meet your needs, for example to set the portal branding.

Before you begin

You can customize the Government Service Portal by following this procedure or by using guided setup for Public Sector Digital Services Core application.

Role required: admin

Procedure

Navigate to **All** > **Service Portal** > **Service Portal Configuration**.

Some of the components that you can customize include:

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- **Branding**: Configure the portal branding to give your Government Service Portal its own look and feel. For example, you can give your portal a name and add your logo.
- **Menus**: Configure the portal header menu to set up the main menu, one of the main navigation controls for your users.
- **Homepage**: Assign a homepage to the portal.
- **Widgets**: Use Service Portal widgets to define the content in your portal.
- **Roles**: Configure page security by role to either set up pages to be public (no login required) or to filter them by user role.

Configure the portal service catalog for a constituent, business, or agency

Configure the Public Sector Digital Services service catalog so that you can define the type of public service being offered, the service taxonomy, and which agency offers the service. These services are displayed on the Government Service Portal or GOV.UK Design System Service Portal.

About this task

For more information on creating and maintaining service catalogs, see Service Catalog.

Before you begin

Note: Determine which fields contain sensitive information and how to encrypt them to protect sensitive data.

Role required: admin

Procedure

1. Navigate to **All** > **Service Catalog** > **Catalog Definitions** > **Maintain Categories**.
2. Select **New** or open the catalog item to be edited.
3. On the form, fill in the fields.

Public Services Service Catalog form

Field	Description
Name	Name of the public service.
Catalog	Product category that the service falls under. If empty, select **Government Service**.
Category	Indicates the type of public service.
Application	Application scope of the service. Select from the following options: ○ Public Sector Digital Services Core ○ License and Permit Playbook ○ Information Request Administration ○ Service Request Playbook
Status	Status of the public service. Mapped in the active field as: ○ Available = true ○ Not Available = false

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Field	Description
Short description	Short description of the public service.
Description	Description of the public service.

4. Select **Submit** or **Update**.

Configure GOV.UK Developer Toolkit

Plan and configure your use of the GOV.UK Developer Toolkit, a library of reusable portal widgets that follow GOV.UK design guidelines, enabling developers to build service portals for UK constituents.

Install the GOV.UK Developer Toolkit

Install the GOV.UK Developer Toolkit application (sn_gsm_uk_gds_wdgt) to deliver citizen-centered digital services and portals without rebuilding them from scratch. This application includes demo data and installs related ServiceNow® Store applications and plugins if they aren't already installed.

Before you begin

- Ensure that the application and all of its associated ServiceNow Store applications have valid ServiceNow entitlements. For more information, see Get entitlement for a ServiceNow product or application.
- Review the GOV.UK Developer Toolkit application listing in the ServiceNow Store for information on dependencies, licensing or subscription requirements, and release compatibility.

Role required: admin

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the GOV.UK Developer Toolkit application (sn_gsm_uk_gds_wdgt) by using the filter criteria and search bar.

   You can search for the application by its name or ID. If you can't find the application, you might have to request it from the ServiceNow Store.

   In the list next to the **Install** button, the versions available to you are displayed.
3. Select a version from the list and select **Install**.

   In the Review Installation Details dialog box, any dependencies installed with your application are listed.
4. If you're prompted, follow the links to the ServiceNow Store to get any additional entitlements for dependencies.
5. **Optional:** If demo data is available and you want to install it, select the **Load demo data** check box.
   Demo data are the sample records that describe application features for common use cases. Load the demo data when you first install the application on a development or test instance.
6. Select **Install**.

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What to do next

Use the following procedures to configure and customize the GOV.UK Developer Toolkit GDS Service Portal to your needs:

Configure GOV.UK Developer Toolkit

Configure the GOV.UK Design System (GDS) Service Portal

Configure the GOV.UK Design System Service Portal User Profile page

Configure the GOV.UK Design System Service Portal Error Pages

Configure the GOV.UK Design System (GDS) Service Portal

Customize and modify the GOV.UK Design System Service Portal to meet your needs.

The GOV.UK Design System Service Portal (/ukgds) is a Service Portal with a library of configurable widgets and pages (catalog, case list, case details, knowledge articles, and record producer) that resemble the GOV.UK design system, and follow the patterns that GOV.UK dictates. The GOV.UK Design System Service Portal comes default with the GOV.UK Developer Toolkit.

A portal is the engine that contains all references to the content that constituents will see in their end-user experience. The portal record defines the URL extension for a site, the portal's knowledge base, its catalog, and its homepage. The portal record can also be used to define the header menu and portal branding. With the GOV.UK Developer Toolkit, you can use the base system GOV.UK Design System Service Portal that is provided for you, or you may add any number of GDS-adherant portal widgets and pages provided with the Developer Toolkit to an existing portal. For a list of widgets included in the GOV.UK Developer Toolkit widget library, see GDS Service Portal Widget Library.

After installation of the GOV.UK Developer Toolkit, you can customize the default GOV.UK Design System Service Portal to add or change widgets, themes, and branding, and can configure page and widget access by role.

Configuration Overview

This workflow provides a high-level overview for configuring the GDS Service Portal, after you have installed the GOV.UK Developer Toolkit.

1. Configure the base-system GDS Service Portal record.

   A base system GOV.UK Design System Service Portal is provided with the GOV.UK Developer Toolkit that can be modified using widgets and pages to fit your needs. The portal record defines the URL extension for an agency's portal site (which for the GDS Service Portal is, by default, /ukgds), and things like the knowledge base, catalog, record producers, and homepage. You can also use the portal record to define the header menu and the portal branding.

2. Configure the portal branding and theme.

   With the Branding Editor, you can configure the styles and theme of the GOV.UK Design System Service Portal with real-time updates, allowing you to see how your portal appears to users. By default, the GDS Service Portal theme adheres to standards set forth by the UK government for branding, accessibility, and responsive design. The default portal theme supplies standardized color palettes, typography, and styling for GDS Service Portal components, and styled headers, footers, search widgets, breadcrumbs, and knowledge pages, aligned with Gov.UK standards.

3. Configure portal pages and widgets.

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Pages are the centerpiece of the end-user portal experience. By default, the GOV.UK Developer Toolkit provides a library of already-configured portal pages that contain the necessary components that are set forth by GOV.UK Design System guidelines, and can be customized to fit your needs. You can also use any existing base system pages as examples when creating new pages from scratch.

Widgets are what define the content of your pages. By default, the GOV.UK Developer Toolkit provides a library of already-configured widgets that adhere to GOV.UK Design System guidelines, display relevant information, and can be customized to display different variations of information. You can use the base system widgets provided with the GOV.UK Developer Toolkit to get started configuring portal pages.

4. Configure search in the portal.

   Search data displays within a widget on the search page. To make data searchable from a portal, create a search source that fetches data from a single table within your instance, from multiple tables, or from an external site. Enable AI Search to allow constituents to take advantage of intelligent query features and find the answers they need.

5. Manage access to the portal.

   Manage who can access the GDS Service Portal by making pages or widgets public, configuring login and single sign-on (SSO), or limiting page access by role. You can also use advanced user criteria for access to pages, widgets, and more. Configure page/widget security by role to either set up pages or widgets to be public (no authentication required), or to filter them by user role. By default, all pages and widgets in the GDS Service Portal, except the login and registration pages (and their respective widgets), require authentication to be accessed.

Configure the GOV.UK Design System Service Portal record

Use the portal record on the platform UI to change components of your GDS Service Portal.

Before you begin

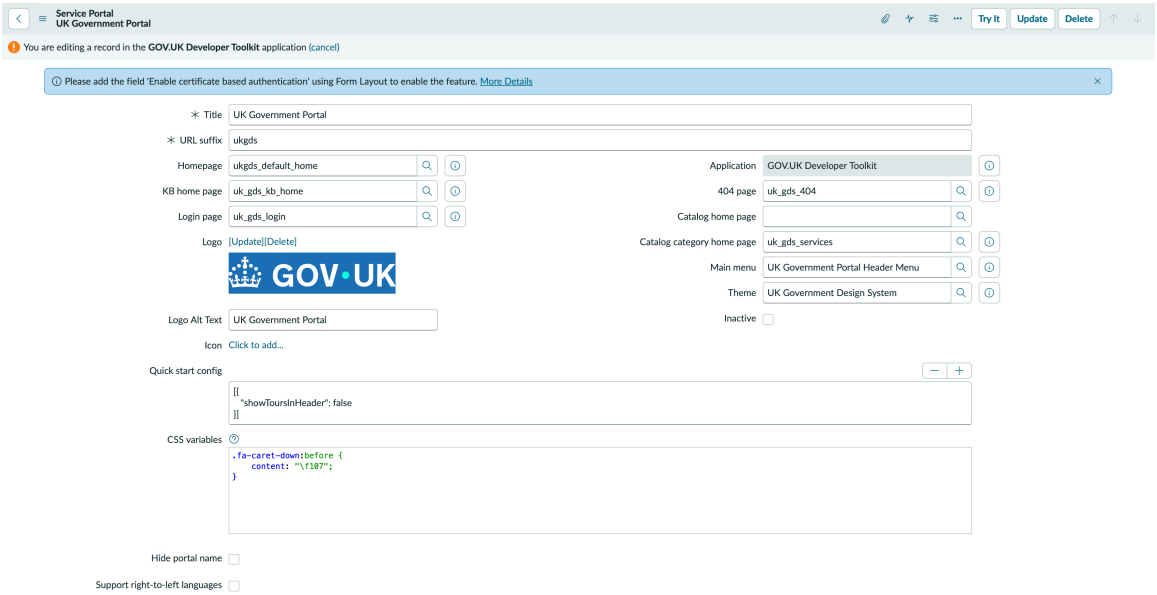
Role required: admin, sp_admin

Note: Ensure the scope is set to the **GOV.UK Developer Toolkit** application.

About this task

On the portal record page, you can change aspects such as portal title, URL suffix, homepage, login and registration pages, error pages, theme, menu headers, and catalog homepages. You can also define search sources and knowledge bases for the portal using the portal record.

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Procedure

1. Navigate to **All** > **Service Portal** > **Portals** and select **UK Government Portal** to open the portal record.
   A page opens in your instance where you can configure the GDS Service Portal.
2. Select the field you want to edit, and select the desired option using the catalog search menu for Page ID.

   Selecting the search icon ( ) will open a page in your instance that displays a list of Page IDs.
3. Select **Try it** to test out the edits your portal before publishing, or **Update** to save and publish your changes immediately.

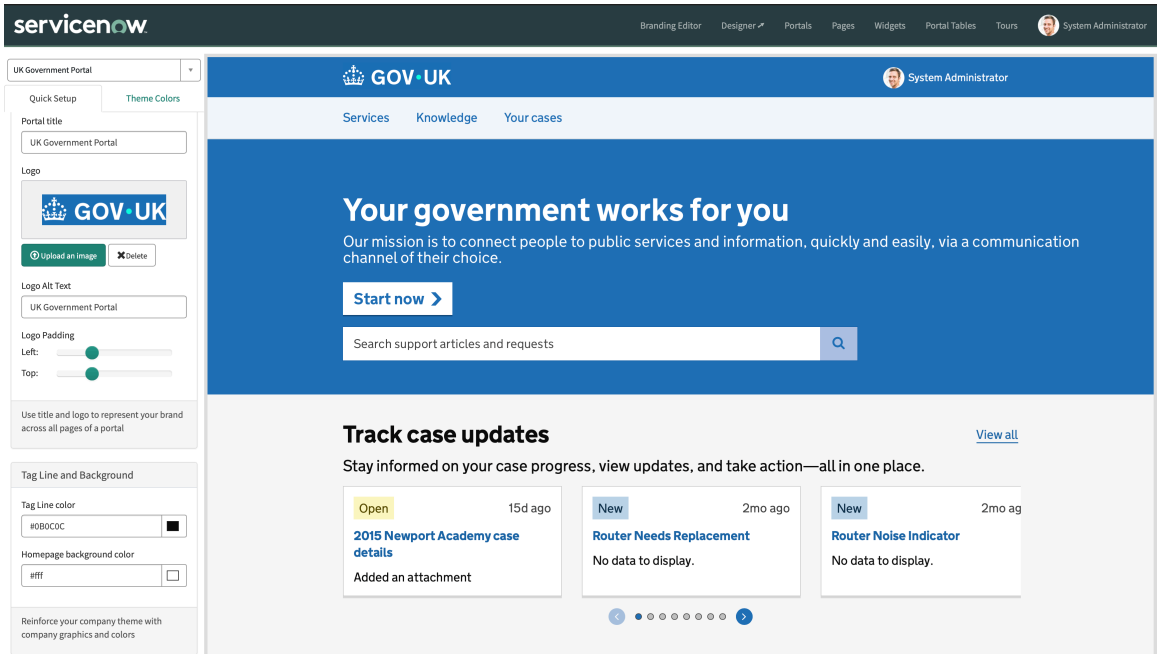
Configure the GOV.UK Design System Service Portal theme

Use the Branding Editor to give the GDS Service Portal its own look and feel.

You can customize the default GDS Service Portal theme to suit your needs using the Branding Editor. To access the Branding Editor, navigate to **Service Portal** > **Service Portal Configuration**, then select **Branding Editor**.

From the portal list, select **UK Government Portal**, and use the options on the Quick Setup and Theme Colors tabs to customize the portal.

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Quick Setup tab options

Field	Description
Portal Title	The name of your portal. Changing the name of the portal in the also changes the title on the portal form field in the platform UI.
Logo	The logo that appears in the header for your portal. This image is scaled to a maximum height of 46 px and a maximum width of 200 px.
Logo padding	Where you want the logo to sit in relation to the edge of the header. This information is stored in the CSS variables section on the portal form.
Tag line & background	Fields defined by the JSON schema in the **Quick start config** field on the portal record in the platform UI. The sample Service Portal adds **Tag Line** and **Background** to the using the following schema: `[{ "tagline": { "table" : "sp_instance", "sys_id" : "34fe3d96cb20020000f8d856634c9cf4", "field" : "title" }, "hero_background": { "table" : "sp_container", "sys_id" : "be98a8d2cb20020000f8d856634c9c63", "field" : "background_image" } }]` For more information on editing the portal from the portal record page, see Configure the GOV.UK Design System Service Portal record.
Tag line	Introduce your users to a portal page with a tag line. This text is stored in an instance of the homepage search widget.

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Quick Setup tab options (continued)

Field	Description
Tag line color	Select a color for the tag line.
Homepage background color	Add a color for your background. You can type in a color name, hex color, decimal (RGB), or select from the color palette.
Background image	Upload an image to appear in the background of your homepage. This image is stored in the container for the widget on your homepage.

The default theme for the GDS Service Portal employs Gov.UK design system standards, and includes the official Gov.UK color palette (primary, secondary, background, text colors). To choose other colors, navigate to the Theme colors tab. The theme preview updates as you make changes. Changes made to the theme colors in the appear in the CSS variables field of the portal form in the platform UI.

Add a header or footer

To add a header or footer to your portal, you must configure it through the theme of the portal.

1. Navigate to **All** > **Service Portal** > **Service Portal Configuration** > **Portal Tables** > **Themes**.
2. Select the theme you want to add the header or footer to.
3. In the header or footer field, select the header or footer you want to use for your portal.

   By default, the toolkit provides a GDS-compliant base system Stock Header or Sample Footer widgets that you may select for reuse.
4. Optional: Select **Fixed Header** or **Fixed Footer** to lock the header or footer in one place so when users scroll up or down they remain in the same location on the page.
5. To configure the appearance of the header, in the Service Portal configuration page, open the Branding Editor.
6. Under the **Theme Colors** tab, use the color selectors in the Navbar section to control the colors in the header.

For information on creating and customizing the header/footer menu, see Create a portal header menu.

Customizing the Portal CSS

Changes made in the Branding Editor or to specific components of the portal (such as a widget or a page container) override any customizations made to the theme. If your portal needs more customization than Branding Editor can provide, you can edit the CSS of the existing theme. For information on how to customize the portal theme using CSS, see Create a portal theme.

Configure the GOV.UK Design System Service Portal Pages

By default, the GOV.UK Developer Toolkit supplies you with pages that can be used as-is, or customized by adding and removing widgets in Service Portal Designer.

Portal pages

Use portal pages to organize content and design portal user experiences for your constituents. A page provides the base structure for how a collection of information is displayed in the

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constituent-facing GOV.UK Design System Service Portal. Pages house elements such as layouts, patterns, containers and rows (which, in turn, house widgets), and other components to display information. By manipulating the layout of the page and the widgets within it, you can construct the desired user experience and display the information your user needs to access.

- Pages are referenced using the page ID.
- Pages and its widgets can be referenced in more than one portal.
- Use base system pages as templates.

Several pages are included with the GOV.UK Developer Toolkit application for use with the GDS Service Portal. You can use these portal pages as is, or you can customize them to suit your needs. The GDS Service Portal contains the following pages by default:

GOV.UK Design System Service Portal pages

Page	Description
Homepage	This page serves as an entry point to the GDS portal for UK citizens, enabling access to relevant public services, and navigation to high-priority actions, key information, quick links, and case updates.
Registration and Log-in	These pages enable a user to register or login to the portal, with different configurable forms and widgets for constituent, business contact, and business, registration.
User Profile	This page provides the basic structure for UK constituents to view and manage their personal profiles, preferences, and activity history.
Services	This page enables UK constituents to view all the public services available to them in the GDS Service Portal.
Case List	This page enables UK constituents to view all of their submitted requests for public services.
Case Details	This page standardizes ticket views across the portal, allows UK constituents to track case status and communications, and staff agents to manage case details and documents.
Knowledge	These pages enable UK constituents to browse and search articles and guides, categorized into organized content sections (Featured, Most Useful, Most Viewed), without contacting support.
Frequently Asked Questions (FAQs)	This page provides an organized, searchable, and accessible repository of frequently asked questions, enabling users to find answers to common questions about services, submissions, or portal functionality.
Record Producer	This page enables UK constituents to submit new cases or requests via a GDS-compliant form.
Error Handling	These pages provides the basic structure for GDS-compliant error pages that display error messages with helpful links on a 404, 500, or 503 error.

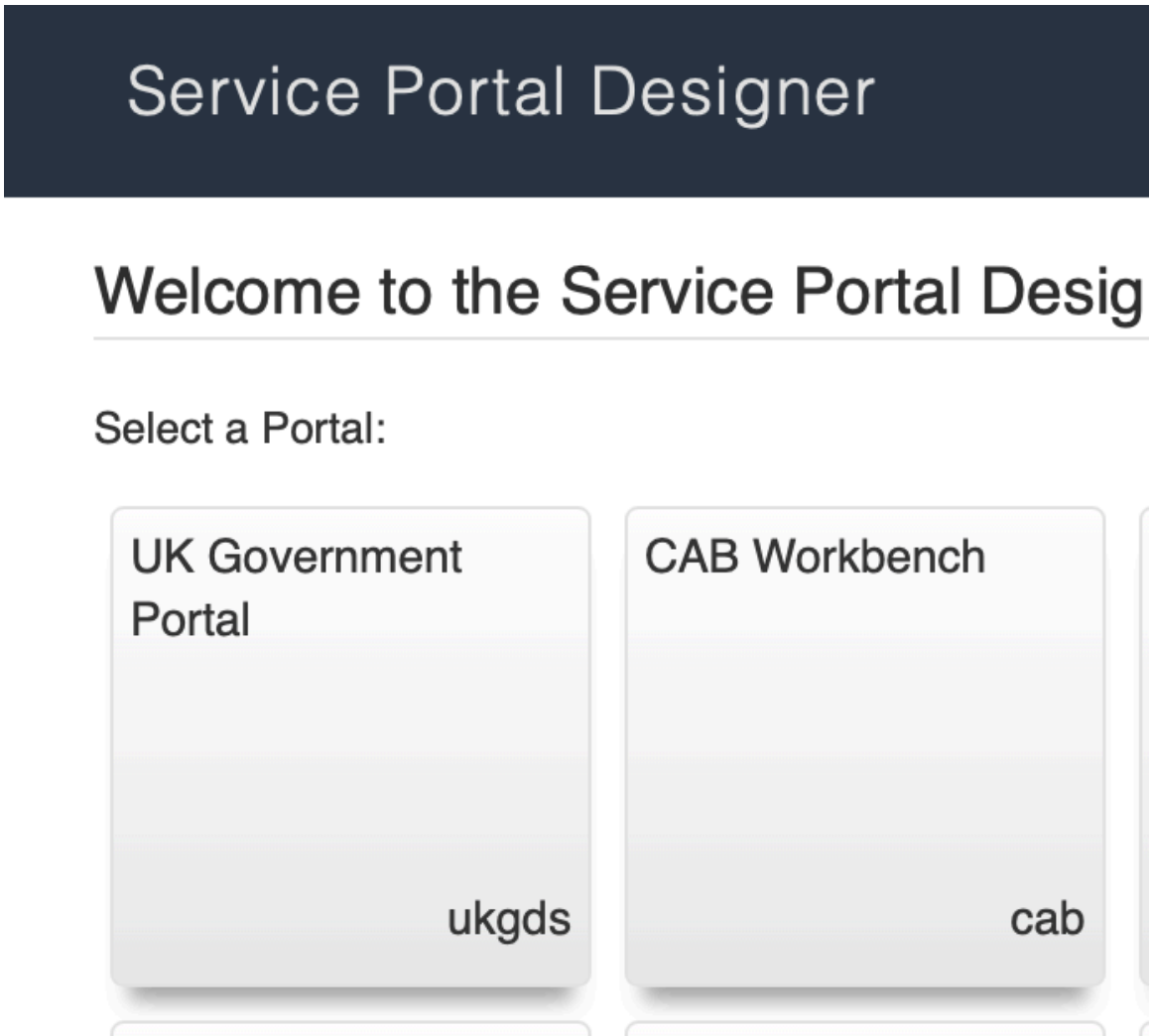
Navigate to **All > Service Portal > Pages** to see the Pages [sp_page] table, which displays a list of pages available for use and customization within the portal.

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Create and edit a GDS Service Portal page using Service Portal Designer

By default, the GOV.UK Developer Toolkit supplies you with already-configured pages that contain widgets and other elements that adhere to GDS guidelines, but you can create or edit existing pages to organize the columns that house the widgets and widget instances.

1. Navigate to **All** > **Service Portal** > **Service Portal Configuration**.
2. Select **Designer**.
3. Select UK Government Portal to switch to editing or designing pages for the GDS Service Portal.



4. From the Service Portal Designer, select a page to customize, or select **Add a new page**.

   For example, to customize the 503 Service Unavailable error response page for the GDS Service Portal, select **UK GDS 503**.

5. Edit page properties by selecting **Page** settings in the menu bar.

   Here, you can configure properties such as page title and ID, short description, and add page-specific custom CSS.

6. **Optional**: Under Layouts, select **Container** and drag it onto the page, then drag one of the other layouts and place it in the container.

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This layout defines the structure of your page and the space available to place widgets. The structure of the layout aligns with the Bootstrap grid template and adds up to 12. If you are editing an existing page and the existing layout of the page meets your needs, you may skip this step.

7. Edit container properties by selecting the **Container**, then selecting the edit icon ( ).

   Here, you can customize properties such as container name, width, CSS class, and the background color or image for that particular container (and its widgets).

8. Use the Widget filter to search for an existing widget, then drag the widget to the container layout to add it to the page.

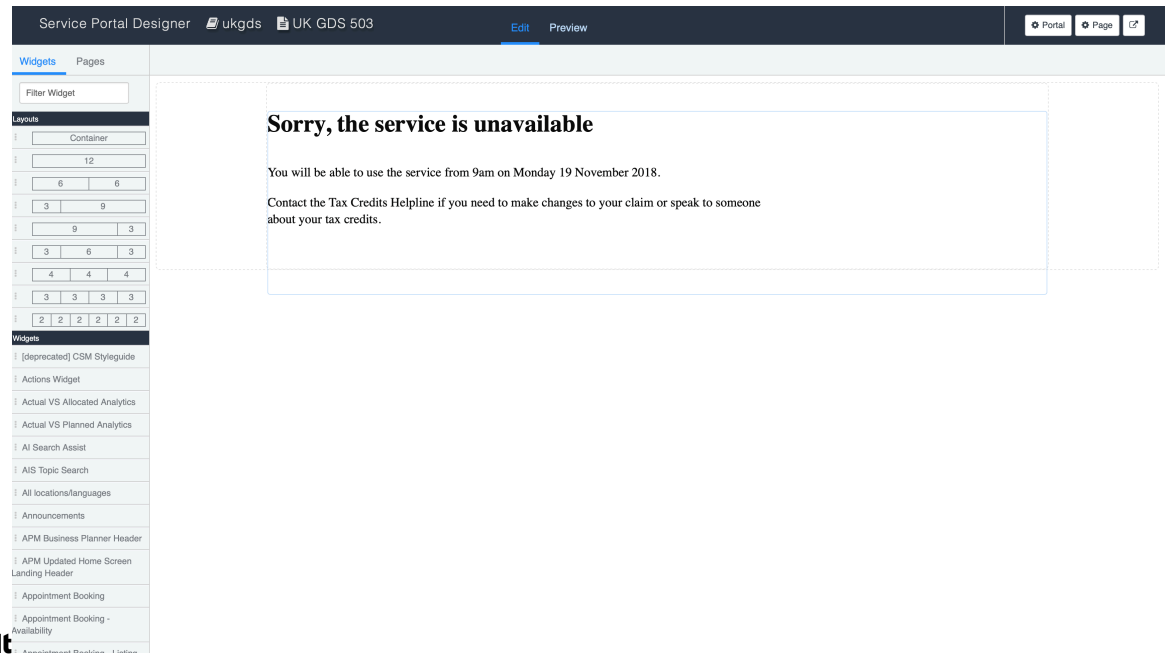
   Each widget added to a page becomes its own instance. Widget instances get their logic from the base widget template, as well as other set scripts and properties that can be configured specific to that instance. Select the pencil icon ( ) to edit an instance of a widget on this page. You may have multiple instances of the same widget on a page, each with different instance options configured. Editing the instance options of a widget does not affect the properties of the base widget template.

   For widgets that do not contain any information by default, you must configure the options for their widget instances before they will appear on a portal page. For more information about configuring widget instance options, see Configure widget instances.

   For more information on the library of widgets and other page components that are included with the GOV.UK Developer Toolkit and GDS Service Portal, see GOV.UK Design System Service Portal Widget Library.

9. Select the **Preview** tab to preview your changes to the page, or the icon to view the edited page in a new tab.

   Your changes save automatically.



Result

The page is created with, or is edited to include, the desired content and widgets.

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Add a page to the GOV.UK Design System Service Portal

Add a page in the GDS Service Portal, to which you can add any combination of GDS-compliant portal widgets from the GOV.UK Developer Toolkit widget library.

Before you begin

Role required: admin or sp_admin

Procedure

1. Navigate to **All** > **Service Portal** > **Service Portal Configuration** > **Designer**.
2. On the Service Portal Designer page, select **Add a new page**.
3. Enter the text for the page title.
4. Enter an ID for the page that does not include spaces or any special characters
5. Select **Submit**.

Result

The page is created in the Service Portal Designer and is added to the GDS Service Portal. It can be configured using any number of widgets or other components designed for use with this portal. For a list of widgets and other page components included with the GOV.UK Developer Toolkit and GDS Service Portal, see GOV.UK Design System Service Portal Widget Library.

This page can also be added to other portals using Service Portal Configuration.

Configure the GOV.UK Design System Service Portal Registration and Login pages

The GOV.UK Developer Toolkit provides default GDS Service Portal registration and login pages that are complaint with GOV.UK design standards. You can use these pages as-is, or you can configure the default widgets to meet your needs.

Portal Landing page

When accessing the portal homepage as a non-authenticated user, users are displayed the option to log in or register for the GDS Service Portal. This homepage is the same page as the portal homepage, albeit without any of the widgets that would be shown to an authenticated user. This page contains a login button in the header, and a link to the registration page for users that don't have a record in the system. On login or registration, the page redirects users to the portal homepage view for logged-in users, that is populated with widgets that display various sources of information that requires authentication.

Note: You can configure this page to display widgets or components that don't require authentication. To configure access to widgets or pages, see Manage role-based access to pages and widgets in GOV.UK Design System Service Portal.

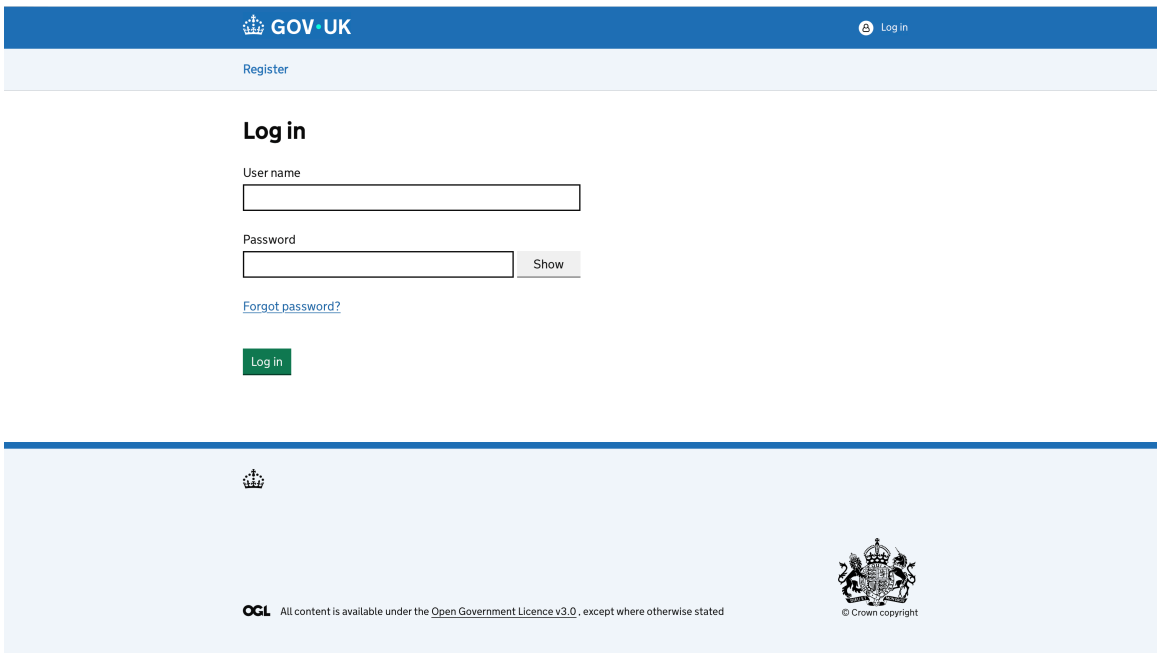
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Login Page

When a user selects **Log in** on this landing page, they are directed to the default GDS Service Portal login page. The default login page (uk_gds_login) contains the UK GDS Login widget, which provides a field for users to enter their credentials for log-in to the GDS Service Portal. This widget uses credentials from the User [sys_user] record, and redirects users to the portal homepage view for logged-in users upon authentication.



This login page can be customized using widgets, and you can define different login scenarios that will redirect user to certain pages on authentication. For more information on customizing login scenarios in a portal, see Define login scenarios.

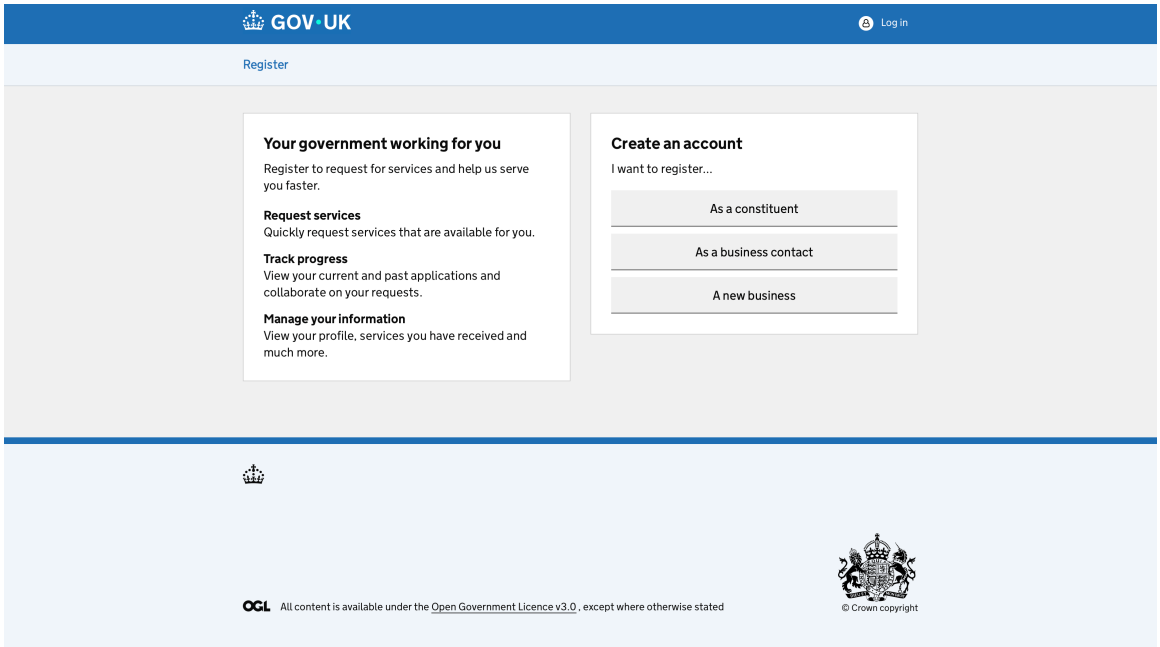
Registration Pages

When a user selects Register on this page, the default GDS Service Portal registration page (uk_gds_register) displays. The default registration page contains the following widgets:

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- UK GDS Registration Content widget, which displays a card showing a heading, subtitle, and a list of benefits of registration for the portal.
- UK GDS Registration Info widget, which displays registration type options (constituent, business contact, new business). Selecting a type within this widget will navigate to the registration page for that type, each with distinct widgets or forms that can be customized or replaced.

Authenticated users are redirected to the portal homepage.



The default Constituent registration page (uk_gds_constituent_register) contains the UK GDS Registration Request widget, which displays a field that captures email, first name, last name, phone (optional), password, and acceptance of the terms and conditions.

The default business registration page (uk_gds_business_register) contains the UK GDS Business Registration widget, which displays a multi-section registration form allowing users to register a new business, and creates a `sn_gsm_business_registration` record.

The default business contact registration page (uk_gds_business_contact_register) contains the UK GDS Business Contact Registration widget, which displays a "Create an account" form allowing users to register as a business contact, creating a `sn_customerservice_registration`record.

These pages and forms adhere to GOV.UK form patterns using single-column layout, inline validation via `ukgds-error-message`, error summary via `ukgds-error-summary`, reCAPTCHA, and a terms & conditions checkbox.

For more information on how to edit widgets that appear on a page in the Service Portal Designer, see Configure the GOV.UK Design System Service Portal Pages. For more information on portal pages, see Create and edit a page using the Service Portal Designer.

Configure the GOV.UK Design System Service Portal Homepage

By default, the GOV.UK Developer Toolkit provides a homepage that is complaint with GOV.UK design standards. This page contains widgets and other components that enable UK constituents to access cases, announcements, and helpful content, and quick navigation to detailed views and actions. You can use this page as-is, or you can configure the default widgets on the page to meet your needs.

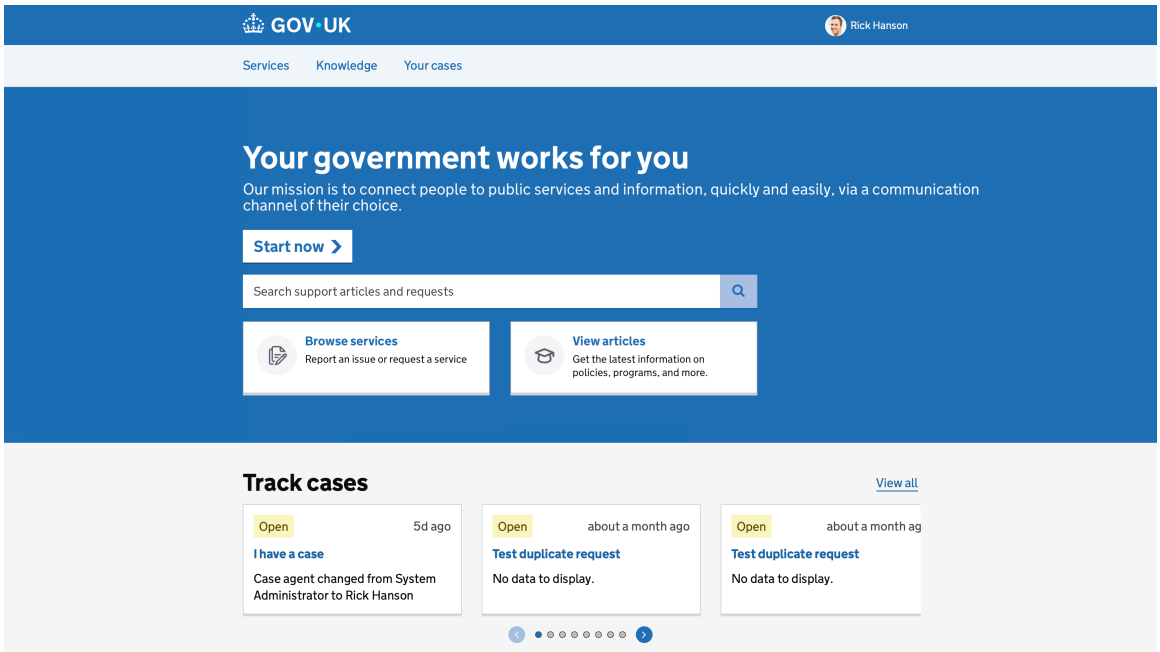
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Before you begin

Role required: admin

About this task

By default, the GDS Service Portal experience begins on the homepage for authenticated users when referenced by the URL suffix (/ukgds). The homepage houses several widgets and page components that contain the major information and actions that users see when they access the portal or log in. Each homepage widget offers different interaction options for accessing detailed information and completing actions.



The default GDS Service Portal homepage contains the following widgets that can be toggled on or off, rearranged, or edited to fit your portal needs.

UK GDS default homepage Widgets

Widget	Description
Header	Contains GDS logo and branding, Global navigation links (Home, Search, My Work, Reports, Tasks, Calendar, Approvals, Notifications), a search bar for content lookup, and access to authenticated user profiles.
Portal Banner with Quick Links	Contains a personalized greeting message, customizable call-to-action button, and search functionality for services and articles.
Case Cards	Display recent case updates in card format. Include timestamps and status indicators.
Quick Links	Cards for common actions (e.g., Create procurement request, Incident report). Links to guides and tutorials.
Browse Catalog Cards	Grid or card layout for service categories (Driving license application, Child benefit application, Report an issue, etc.).

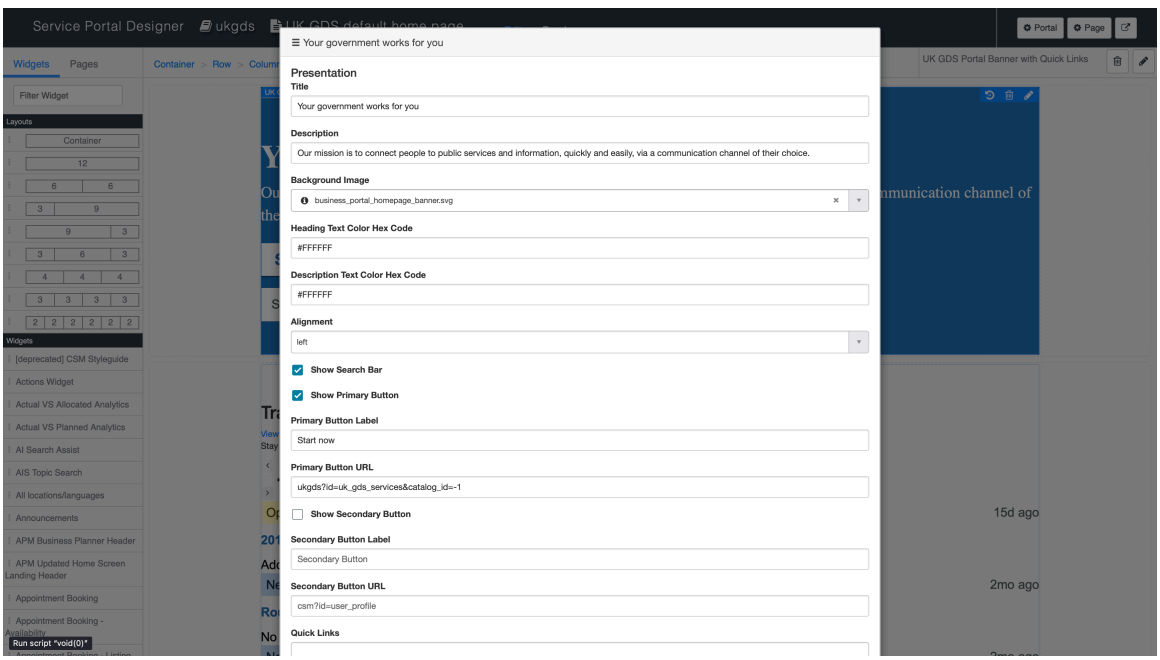
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UK GDS default homepage Widgets (continued)

Widget	Description
Knowledge Links	Showcase popular articles with engagement metrics (views, likes, comments).
Catalog Quick Links	Highlight frequently accessed services for quick navigation.
FAQ	Expandable list of common questions with answers
Footer	Links for support, resources, legal information, and social/connect options.

Procedure

1. Navigate to **All** > **Service Portal** > **Service Portal Configuration** > **Designer** and from the pages list, select **UK Government Portal Homepage**.
2. Add or delete existing widgets, or select the edit icon to modify page properties such as titles, quick links, colors, and images.



What to do next

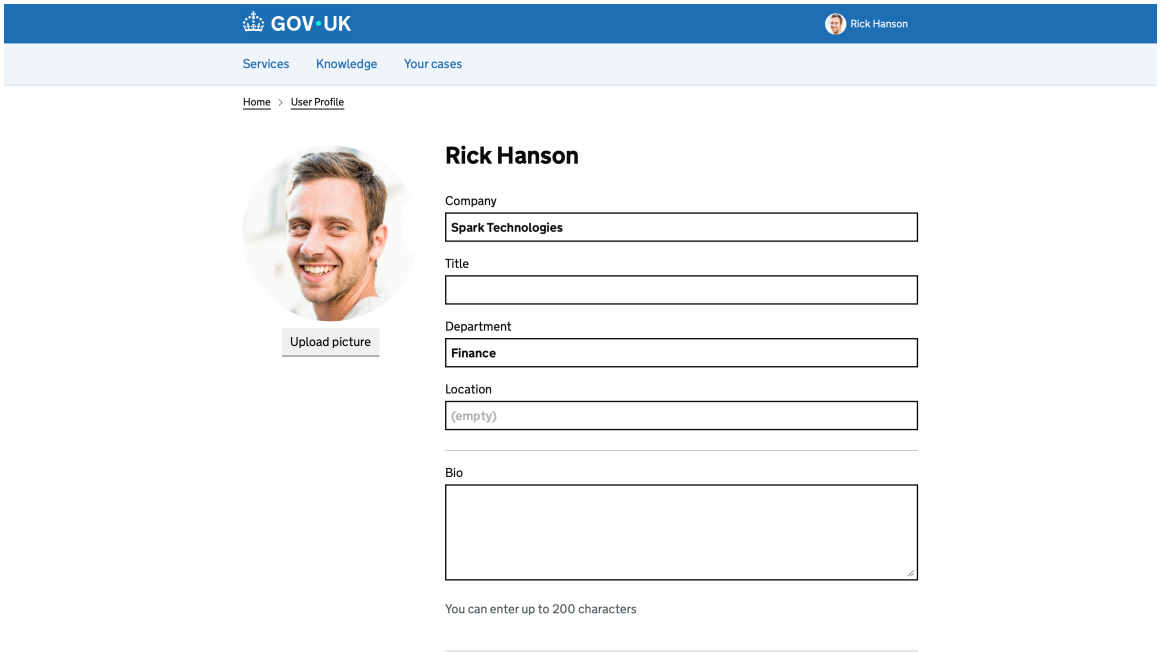
For more information on how to edit widgets that appear on a page in the Service Portal Designer, see Configure the GOV.UK Design System Service Portal Pages. For more information on portal pages, see Create and edit a page using the Service Portal Designer.

Configure the GOV.UK Design System Service Portal User Profile page

Configure the user profile page using widgets and widget instances, enabling UK citizens to view and manage their personal profiles, preferences, and activity history.

By default, constituents editing their profile in the GDS Service Portal will be shown the user profile page, which houses several GDS-adherant widgets and page components that allow them to add, update, or delete information from their user profile.

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This default page provides the basic structure for a user profile page that specifies details about an user like their name, company, title, and location. By default, the User Profile page contains the following widgets that can be customized or removed:

- Header widget, which controls which options appear in the page header. Contains GOV.UK logo, global navigation, language selector, notifications, user profile.

  Note: This widget cannot be cloned for modification. Instead, configure the header menu by associating the header menu with a portal. For more information on configuring a header menu, see Configure a portal header menu.

- Breadcrumbs widget, which displays information based on where a page is located in a portal, allowing users to navigate around.

  Note: You can customize this widget only to change the breadcrumb path. For more information, see KB0719179.

- User Profile portal widget, which displays profile photo, name, contact details, and other user profile information.

  Note: You can use this base system widget as-is on the User Profile portal page, modify the widget instance (which makes changes on this page **only**), or clone it to make modifications across multiple pages that suit your own business needs. For more information on how to clone widgets and use widget instances, see Configure the GOV.UK Design System Service Portal Widgets.

- Footer Widget, which displays support links, other resources, and legal disclaimers.

  Note: Add or edit a footer for your portal by configuring it in the Theme form. For more information on adding a footer to a portal, see Add a header or footer to a portal.

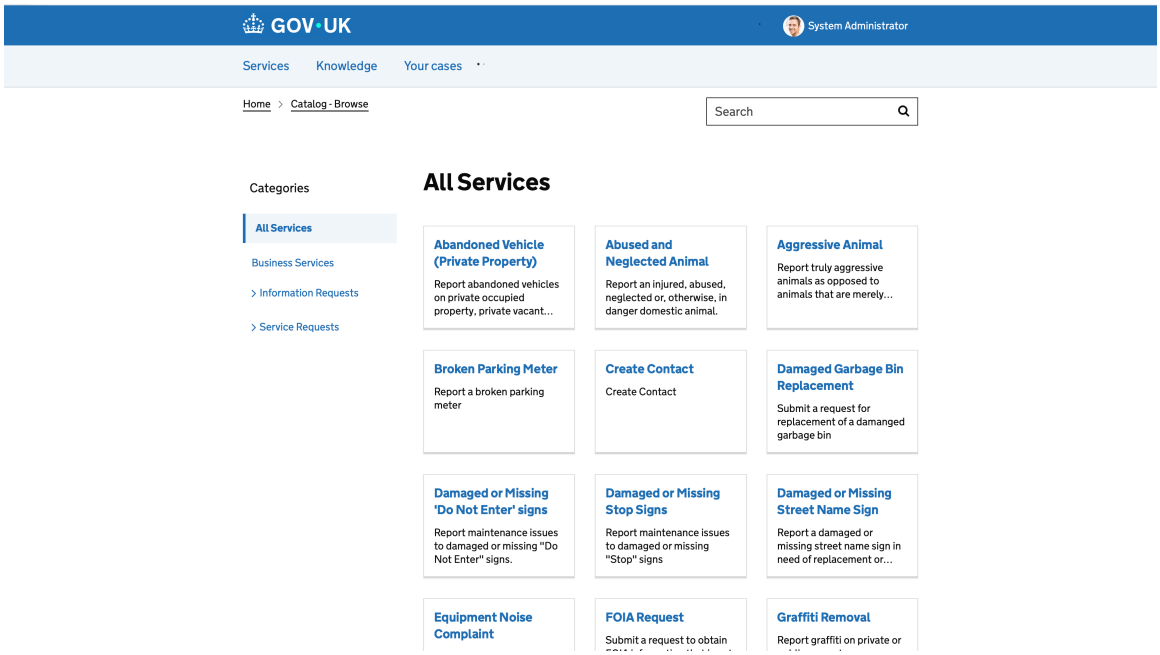
For more information on how to edit widgets that appear on a page in the Service Portal Designer, see Configure the GOV.UK Design System Service Portal Pages. For more information on portal pages, see Create and edit a page using the Service Portal Designer.

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Configure the GOV.UK Design System Service Portal Services Page

Configure the Services page, which enables constituents to browse and search catalog items from different service catalogs and categories and see all services available to them.

By default, users requesting services through the GDS Service Portal will be shown the Services page, a service catalog homepage that lists the services available to constituents from that catalog. Catalog items may be grouped into categories, which can also contain one or more subcategories. By default, the first 10 items in a category appear under the category name on the service catalog home page.



This default page houses several GDS-adherent widgets and page components that enable them to browse and view all the services that are available for them to request. By default, the Services page contains the following widgets that can be customized or removed:

- Header widget, which controls which options appear in the page header. Contains GOV.UK logo, global navigation, language selector, notifications, user profile.

  Note: This widget cannot be cloned for modification. Instead, configure the header menu by associating the header menu with a portal. For more information on configuring a header menu, see Configure a portal header menu.

- Breadcrumbs widget, which displays information based on where a page is located in a portal, allowing users to navigate around.

  Note: You can customize this widget only to change the breadcrumb path. For more information, see KB0719179.

- Catalog Search widget and Typeahead Search widget, which displays a search box that navigates to the search results page with information specific to the service catalog.
- UK GDS SC Categories widget, which displays the service catalog categories through the catalog selector dropdown and category tree in the sidebar.

  Note: This widget renders the categories available in this widget from the Categories table in Service Catalog [sc_category]. For more information on associating your portal with catalogs, see Configure a catalog in Service Portal and Configure GOV.UK Design System Service Portal Catalog Items.

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- UK GDS SC Category Page widget, which lists the service catalog items available within a certain category.

  Note: Categories are determined within the Service Catalog module.

- Footer Widget, which displays support links, other resources, and legal disclaimers.

  Note: Add or edit a footer for your portal by configuring it in the Theme form. For more information on adding a footer to a portal, see Add a header or footer to a portal.

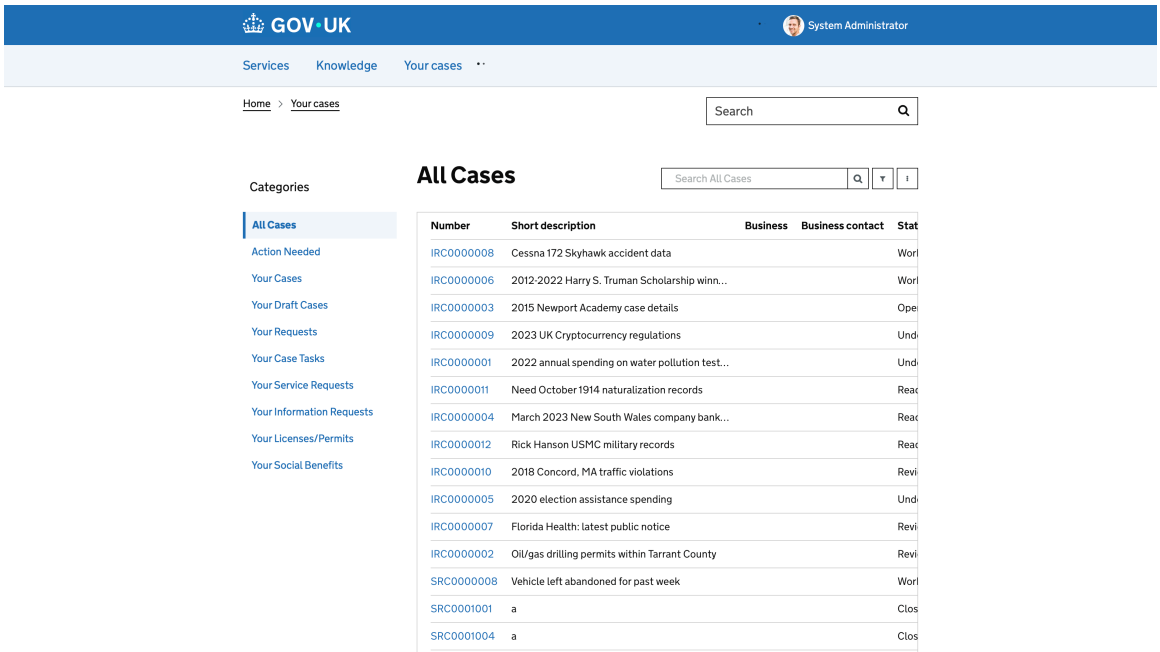
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For more information on how to edit widgets that appear on a page in the Service Portal Designer, see Configure the GOV.UK Design System Service Portal Pages. For more information on portal pages, see Create and edit a page using the Service Portal Designer.

Configure the GOV.UK Design System Service Portal Case List page

Configure the case list page.

By default, users seeking to view the status of a case they have submitted through the GDS Service Portal will be shown the case list page, which enables a constituent to access all cases they can view or act on in the GDS Service Portal. This may include cases they have submitted, or cases that have been submitted on their behalf.



By default, the Case List page contains the following widgets that can be customized or removed:

- Header widget, which controls which options appear in the page header. Contains GOV.UK logo, global navigation, language selector, notifications, user profile.

  Note: This widget cannot be cloned for modification. Instead, configure the header menu by associating the header menu with a portal. For more information on configuring a header menu, see Configure a portal header menu.

- Breadcrumbs widget, which displays information based on where a page is located in a portal, allowing users to navigate around.

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Note: You can customize this widget only to change the breadcrumb path. For more information, see KB0719179.

- Search widget and Typeahead Search widget, which displays a search box that navigates to the search results page with a list of cases related to the search query.
- UK GDS Portal Data List widget, which displays data related to cases from selected case tables in either a list or card format.

Note: JSON parameters control what data categories appear on the Case List page in the GDS Service Portal portal. The Portal Data List widget JSON options define the following 10 case data categories:

  - All Cases
  - Action needed
  - Your cases
  - Your draft cases
  - Your requests
  - Your case tasks
  - Your service requests
  - Your information requests
  - Your licenses/permits
  - Your social benefits

  You can add new data categories to the GDS Service Portal Case List page by inserting a JSON configuration block into the Portal Data List widget in Service Portal Designer.

- Footer Widget, which displays support links, other resources, and legal disclaimers.

Note: Add or edit a footer for your portal by configuring it in the Theme form. For more information on adding a footer to a portal, see Add a header or footer to a portal.

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For more information on how to edit widgets that appear on a page in the Service Portal Designer, see Configure the GOV.UK Design System Service Portal Pages. For more information on portal pages, see Create and edit a page using the Service Portal Designer.

Configure the GOV.UK Design System Service Portal Case Details (standard ticket) page

Configure individual request types to display case details, the request-specific information shown to constituents when viewing submitted requests. They can view case statuses and request history, and communicate with caseworkers and agents.

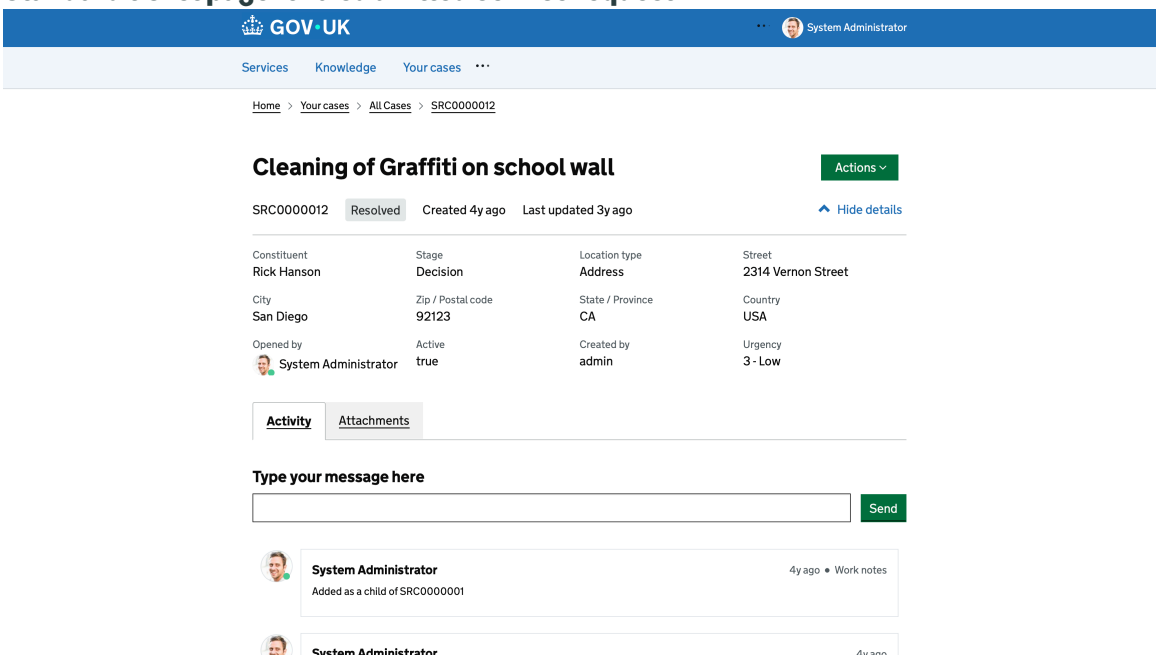
The standard ticket case details page provides UK citizens with updates on their submitted cases. Citizen users can view case status, last updated timestamp, and communication history on the Case Detail Page.

To display the related information, you can configure the standard ticket page for requested services on the GDS Service Portal. This configuration verifies a consistent experience when viewing submitted requests in the portal. For example, in the GDS Service Portal, you can access the ticket page for a requested service using the **Your Cases** option from the main menu header.

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The information displayed in each section of a standard ticket page depends on the individual request type. If a configurable section has no specified values or if a user doesn't have access to the information, it isn't visible. For new GDS Service Portal instances, the standard ticket page is available by default.

Standard ticket page for a submitted service request



Header Widget

By default, this header widget instance displays the following information on the standard ticket page for a submitted service request:

- Identification number
- Created and updated dates
- State.

> **Note:** Instead of the State field, you can also configure any other field that represents the state of the ticket.

To customize the content of this header widget instance, navigate to **All**Service Portals**Service Portal Configuration**Designers**. Confirm that **UK Government Portal** is the portal selected.

Info Widget

If configured, this section displays the following regions for a submitted request:

- Case description with the short description, and optionally the description.

> **Note:** You can map the Description field to any other field on the record.

- Actions region
- Case details

Tab Widget

This widget displays the following tabs for a submitted request, allowing constituents to switch between views and navigate case sections. Each tab is a widget instance.

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- Activity
- Attachments

You can configure the tabs for standard ticket page. For more information, see Configure tabs for standard ticket page.

Customization

You can configure the case details page components, including toggling widgets, customizing header and footer content, and managing breadcrumb navigation to reflect case hierarchy. For more information on how to edit widgets that appear on a page in the Service Portal Designer, see Configure the GOV.UK Design System Service Portal Pages. For more information on portal pages, see Create and edit a page using the Service Portal Designer.

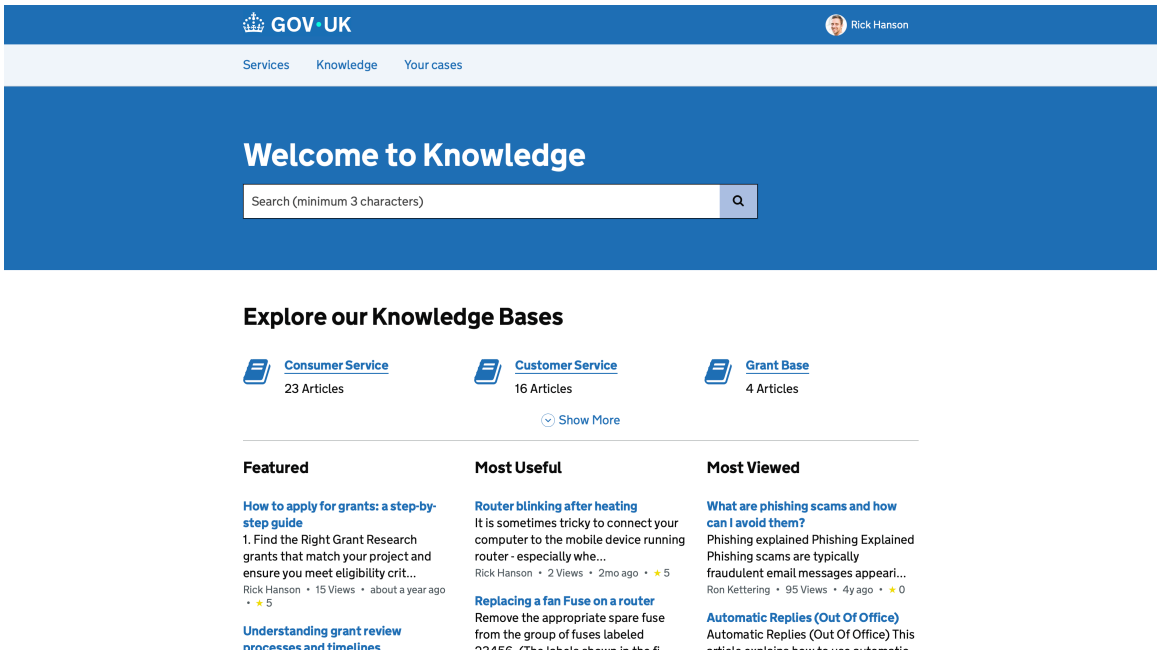
Configure the GOV.UK Design System Service Portal Knowledge Pages

Display knowledge base content for UK constituents using the GDS Service Portal.

By default, the GOV.UK Developer Toolkit comes with four base system knowledge pages, which contain the following widgets.

Most widgets can be configured by cloning and modifying, or you can use the instance options where available to configure widgets for a portal page. For more information on the instance options available for each widget, see Portal Widget Library.

Knowledge Home



The Knowledge homepage contains the following widgets:

- Knowledge Banner Header widget, which controls which options appear in the page header. Contains GOV.UK logo, global navigation, language selector, notifications, user profile.

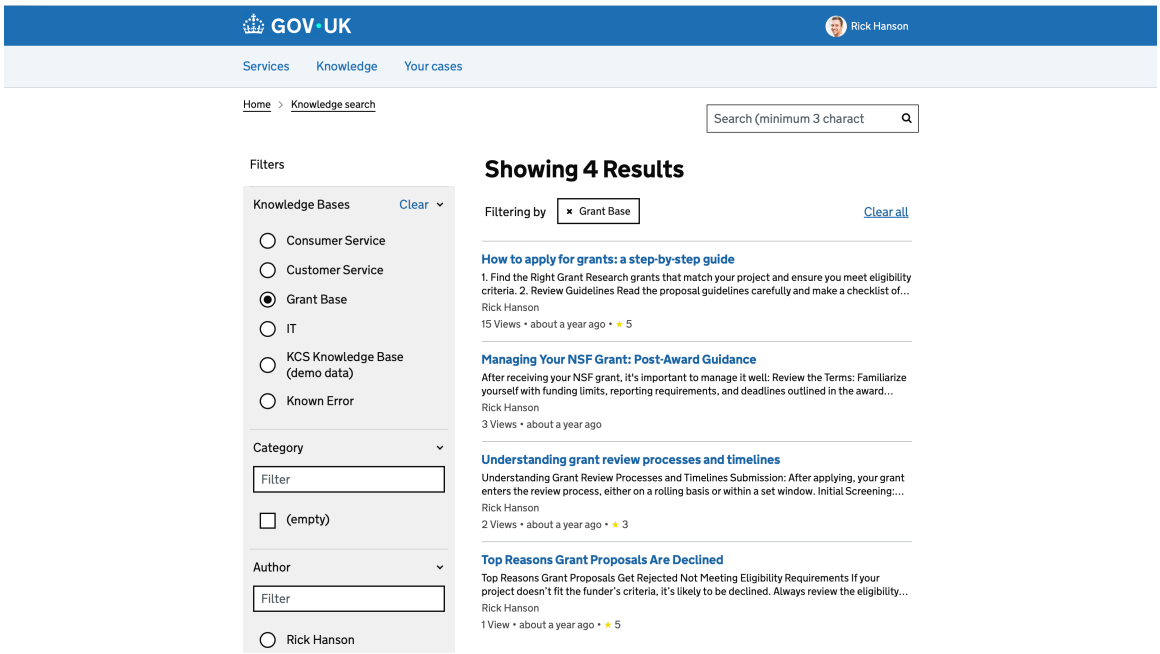
  Note: This widget cannot be cloned for modification. Instead, configure the header menu by associating the header menu with a portal. For more information on configuring a header menu, see Configure a portal header menu.

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- Knowledge Featured Articles widget, which displays profile photo, name, contact details, and other user profile information.
- Knowledge Most Viewed Articles widget, which displays the most viewed knowledge base articles.
- Knowledge Most Useful Articles widget, which displays profile photo, name, contact details, and other user profile information.
- Knowledge Base Categories widget, which displays profile photo, name, contact details, and other user profile information.
- Footer Widget, which displays support links, other resources, and legal disclaimers.

Note: Add or edit a footer for your portal by configuring it in the Theme form. For more information on adding a footer to a portal, see Add a header or footer to a portal.

Knowledge Search



The Knowledge search page contains the following widgets:

- Knowledge Banner Header widget, which controls which options appear in the page header. Contains GOV.UK logo, global navigation, language selector, notifications, user profile.

Note: This widget cannot be cloned for modification. Instead, configure the header menu by associating the header menu with a portal. For more information on configuring a header menu, see Configure a portal header menu.

- Knowledge Base Breadcrumbs widget, which displays information based on where an article is located in a knowledge base. You can broaden your search of the knowledge base to include all of the articles in a particular category by selecting the titles in the breadcrumbs. This widget also includes a search box so that you can search for an article by name.

Note: You can customize this widget only to change the breadcrumb path. For more information, see KB0719179.

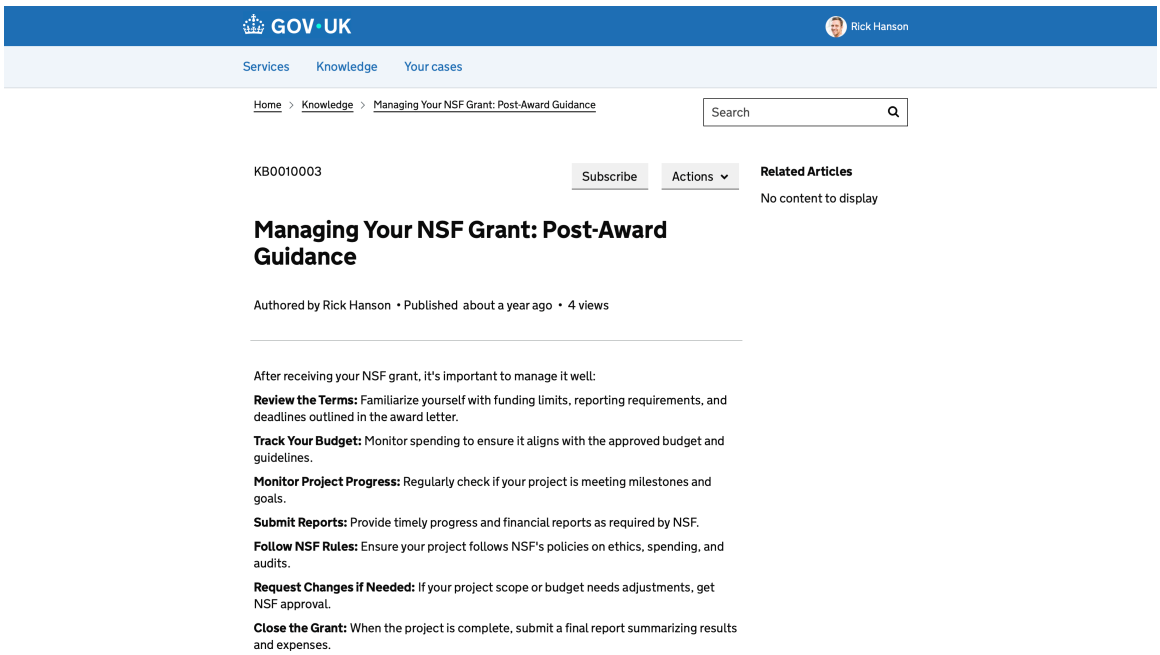
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- Knowledge Search widget which displays search information specifically confined to the knowledge base.
- Knowledge Selected Filter widget, which displays profile photo, name, contact details, and other user profile information.
- Knowledge Result widget, which displays profile photo, name, contact details, and other user profile information.
- Footer Widget, which displays support links, other resources, and legal disclaimers.

> **Note:** Add or edit a footer for your portal by configuring it in the Theme form. For more information on adding a footer to a portal, see Add a header or footer to a portal.

Knowledge Article View

The Knowledge Article view page displays knowledge base details, including the article number, short description, and article content. You can also give feedback or comment on an article.



The Knowledge homepage contains the following widgets:

- Knowledge Banner Header widget, which controls which options appear in the page header. Contains GOV.UK logo, global navigation, language selector, notifications, user profile.

> **Note:** This widget cannot be cloned for modification. Instead, configure the header menu by associating the header menu with a portal. For more information on configuring a header menu, see Configure a portal header menu.

- Knowledge Base Breadcrumbs widget, which displays information based on where an article is located in a knowledge base. You can broaden your search of the knowledge base to include all of the articles in a particular category by selecting the titles in the breadcrumbs. This widget also includes a search box so that you can search for an article by name.

> **Note:** You can customize this widget only to change the breadcrumb path. For more information, see KB0719179.

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- Knowledge Base Search Widget and Typeahead Search widget, which displays search information specifically confined to the knowledge base, with a predictive text feature that shows words as users type.

  Note: The Typeahead Search widget is embedded in the Knowledge Base Search Widget, but each widget has its own instance options. For more information on the instance options available for each widget, see Portal Widget Library.

- Knowledge Article Page widget, which displays Knowledge Base articles within the GDS Service Portal.
- Knowledge Related Articles widget, which displays profile photo, name, contact details, and other user profile information.
- Footer Widget, which displays support links, other resources, and legal disclaimers.

  Note: Add or edit a footer for your portal by configuring it in the Theme form. For more information on adding a footer to a portal, see Add a header or footer to a portal.

Configure the FAQ page for GOV.UK Design System Service Portal

Add the Portal FAQ widget to your portal and modify its data, presentation, and behavior. You can use the Portal FAQ widget to display a frequently asked questions list (FAQ) from a knowledge table on the portal.

The Portal FAQ widget displays a frequently asked questions list (FAQ) from the selected knowledge table in the widget on the portal. It enables your users to find answers to their queries without the need to contact customer support or navigate through multiple knowledge article pages. You can filter the FAQs using options in the main navigation.

For more information on how to edit widgets that appear on a page in the Service Portal Designer, see Configure the GOV.UK Design System Service Portal Pages. For more information on portal pages, see Create and edit a page using the Service Portal Designer.

Configure the GOV.UK Design System Service Portal Error Pages

Use Portal Widgets to configure and customize the error page that is shown when a user encounters errors such as broken links, service issues, or downtime (404, 500, 503).

About this task

This page provides the basic structure for GDS-compliant, fully responsive error pages (404, 500, 503), displaying clear error messages with helpful links. By default, each error page contains the following configurable widgets:

- Header widget, which controls which options appear in the page header. Contains GOV.UK logo, global navigation, language selector, notifications, user profile.

  Note: This widget cannot be cloned for modification. Instead, configure the header menu by associating the header menu with the portal. For more information on configuring a header menu, see Configure a portal header menu.

- Error widget, which displays information based on the error encountered.
- Footer Widget, which displays support links, other resources, and legal disclaimers.

  Note: Add or edit a footer to your portal by configuring it in the Theme form. For more information on adding a footer to a portal, see Add a header or footer to a portal.

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The header, footer, and error message content widgets may be customized to fit your needs using Widget Instances. Optionally, the display of support links or alternative actions can also be configured. For more information on how to configure widgets and widget instances, see Configure the GOV.UK Design System Service Portal Widgets.

Before you begin
Role required: admin

Procedure

1. Navigate to **Service Portal** > **Properties**
2. Select the error page you want to configure, and add a default or customized widget. For more information on how to clone edits for modification, see Configure the GOV.UK Design System Service Portal Widgets.
3. In the Default 404 page for Service Portals, type the page ID found in the ID field of the page form and select **Save**.

Configure the GOV.UK Design System Service Portal Widgets

Configurable portal widgets provide you with the ability to configure the behavior, content, and layout of the GOV.UK Design System Service Portal by configuring widget settings and instance options. Use the base system widgets included with the GDS Service Portal to get started configuring portal pages.

The GDS Service Portal uses widgets for configuration. Widgets are what define the content of your portal pages. You can use the base system widgets provided with the GOV.UK Developer Toolkit in their default state, or you can clone, modify, or develop custom widgets to better fit your needs.

Note: To learn more about cloning or creating widgets, see Developing custom widgets.

When you create or update a page in the Service Portal Designer, you can add widgets to that page by searching in the widget filter and dragging a widget onto the page. You can then configure widget behavior, visual appearance, and content to update the information presented on the widgets. Each time you add a widget to a page, an instance of that widget is created that can be modified individually for use on that page. For each instance of a base system widget that you add to a page, you can configure the instance options available for that widget.

For a list of base system widgets that enable you to configure various pages within the GOV.UK Design System Service Portal, see Widget Library. You can also access all widget records from the platform at **All** > **Service Portal** > **Widgets**.

There are four main categories of widgets available for use with the GDS Service Portal.

Service Catalog widgets

Service Catalog widgets let you browse, request, and track services directly from the GDS Service Portal. They provide the building blocks for a complete Service Catalog experience, allowing users to find what they need and submit requests in one central place.

Service Catalog widgets allow portal users to do the following:

- Browse available services and catalog items.
- Search the catalog from the portal homepage.
- View services by category and submit requests.
- Track requests and approvals.

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These widgets display service information in a streamlined, task-focused way. For example, some widgets help users search or browse the catalog, while others let users view request details or check the status of services they have already requested. As an admin, you can use the Service Catalog widgets to build a catalog for your portal.

Knowledge Management widgets

Knowledge Management widgets enable users to search, browse, and read knowledge articles directly in the GDS Service Portal, so they can find answers to their questions and learn how to use services without contacting support. These widgets provide the core components for building a knowledge experience that can help them find answers quickly and consistently. For more information on creating and maintaining the articles that are shown on the Knowledge Management widgets, see Knowledge Management.

Constituents can use Knowledge Management widgets to do the following:

- Search the knowledge base for information and solutions.
- Browse knowledge bases and categories.
- View knowledge articles and related content.
- See popular, featured, or top-rated articles.
- Interact with articles by rating or commenting, when available.

These widgets organize knowledge content in a clear, navigational way. Some widgets help users discover articles through search and filters, while others display article details and related information on the article page. As an admin, you can use Knowledge Management widgets to build a knowledge base for your portal. For more information on maintaining a knowledge base within a portal, see Configure Knowledge Base.

Service Portal configuration page widgets

Service Portal configuration page widgets help you set up and manage your Service Portal experience. Use these widgets when you configure portals, pages, themes, and widgets in the Service Portal Configuration workspace. These widgets support portal configuration tasks such as:

- Navigating Service Portal configuration pages.
- Viewing portals and pages in a structured, tree-based layout.
- Editing portal themes and previewing design changes.
- Configuring pages and widgets using visual editors.

Service Portal configuration page widgets run behind the scenes and are internal to the configuration experience. For example, they power tools like the Portal Map, Page Map, Branding Editor, and Widget Editor, helping you understand and manage how your portal is structured and displayed.

As an admin, navigate to **Service Portal** > **Service Portal Configuration**to use these widgets.

Search widgets

Service Portal search widgets let you find information quickly across the GDS Service Portal. Use these widgets to search for knowledge articles, catalog items, records, and other content without navigating through multiple pages.

Search widgets help users to do the following:

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- Search for answers, services, and records from a single search bar.
- See relevant results as they type with predictive search.
- Filter and refine search results to find what they need.
- Get suggested or context-aware results while submitting requests.

Service Portal search widgets work in different locations, such as the portal homepage, search results page, or within record producers. Some widgets display a search bar, while others show detailed results with filters and facets for easier discovery. As an admin, you can configure search in Service Portal using any of the search widgets by navigating to **Service Portal** > **Service Portal Configuration** and adding widgets to a page. For a list of Search Widgets available by default in the GDS Service Portal, see Widget Library.

Example widgets

Service Portal example widgets help show what you can do in the GDS Service Portal. These widgets demonstrate how common portal features work and what information you can access directly from a portal page, serving as example code for how scripts are used in a widget.

Example widgets help users to do the following:

- Search for answers, services, and records from a single search bar.
- See relevant results as they type with predictive search.
- Filter and refine search results to find what they need.
- Get suggested or context-aware results while submitting requests.

These widgets appear as ready-to-use components in the GDS Service Portal configuration. Some focus on everyday tasks, such as approving requests or changing a password, while others show interactive or informational elements you might see on a portal page.

As an admin, you can use the example widgets to see how to use HTML, CSS, or client and server scripts in the GDS Service Portal, and clone and extend each widget to suit your needs. For a list of example Widgets available by default in the GDS Service Portal, see Widget Library.

For more information on using configurable widgets in portals, see Using portal widgets.

Customize Widgets for GOV.UK Design System Service Portal pages

You can use base system widgets as-is in the GDS Service Portal, or you may clone them to suit your needs.

Before you begin

Role required: admin

About this task

By default, the GOV.UK Developer Toolkit provides you with a library of reusable portal widgets that follow UK GDS guidelines. Base system widgets are read-only so you can benefit from future updates. To make changes, you can clone base system widgets.

Note: Cloned widgets are considered custom and don't benefit from future updates to the widgets they were cloned from. To learn more about cloning or creating widgets, see Developing custom widgets.

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Procedure

1. Navigate to **All** > **Service Portal** > **Service Portal Configuration**.
2. Open the **Widget Editor**, then select an existing widget from the **Select a widget** list.

   For example, select **Error Widget**.

   Note:

3. From the list menu in the widget header, select **Clone [Widget Name]**.

   For example, select **Clone Error Widget**.

4. Enter a name for the cloned widget.

   The widget ID is created automatically based on the widget name.

5. **Optional**: Select **Create test page** to automatically create a page containing the widget.
6. Use the check boxes to show or hide the different components of the widget editor as needed.
7. Make changes to the HTML Template, CSS, client script, server script, or the link function.

   Note: For server-side scripts, you can turn on using the ECMAScript 2021 (ES12) JavaScript mode if your application uses ES5 Standards mode or Compatibility mode. Scripts in applications with the JavaScript mode set to ECMAScript 2021 (ES12) use ECMAScript 2021 (ES12) by default. For more information, see Turn on ECMAScript 2021 (ES12) mode for a script.

8. To enable a preview of your widget, select the eye icon from the menu bar to **Enable Preview**.
9. Select **Save**.

   Note: If you clone a widget that uses the Angular ng-template, you must manually clone the template and change the name of the template reference in the widget.

Result

The cloned widget is created and can be added to any page that has been created in the portal. Adding a widget to a page creates a new Widget Instance that can be modified separately, and changes will appear on that page **only**. For information on how to add portal widgets to page(s), see Configure the GOV.UK Design System Service Portal Pages.

Add Widgets to GOV.UK Design System Service Portal pages

Add widgets to your portal pages and modify its data, presentation, and behavior. You can use base system widgets as-is in the GDS Service Portal, or you may clone them to suit your needs.

Before you begin

Role required: admin or sp_admin

Note:

If you have not already created the page to which you want to add the widget, see Configure the GOV.UK Design System Service Portal Pages.

About this task

By default, the GOV.UK Developer Toolkit provides you with a library of reusable portal widgets that follow UK GDS guidelines. Base system widgets are read-only so you can benefit from future updates. To make changes, you can clone base system widgets. For information on how to

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configure and clone base-system widgets, see Customize Widgets for GOV.UK Design System Service Portal pages.

Procedure

1. Navigate to **All** > **Service Portal** > **Service Portal Configuration**.
2. Select **Designer**.
3. On the Service Portal Designer page, search for and select the page to which you want to add the widget.
4. Select the **Widgets** tab.
5. In the Layouts section, drag the Container layout onto the portal edit page.
6. On the container, add a set of columns by selecting the plus icon (⊕)
7. On the Widgets pane, in the **Filter Widget** field, enter the Widget name.
8. Drag the widget onto the container.
9. Select **Save**.

Result

The widget is added to the page. Adding a widget to a page creates a new Widget Instance that can be modified separately, and changes will appear on that page **only**. For information on how to add portal widgets to page(s), see Configure the GOV.UK Design System Service Portal Pages.

Add a step-by-step navigation widget to a GOV.UK Design System Service Portal page

You can use base system widgets as-is in the GDS Service Portal, or you may clone them to suit your needs.

Before you begin

Role required: admin

About this task

Step-by-step navigation is a full, deliberately-built pattern implementation with two cooperating widgets, the UK GDS Step-by-Step (uk-gds-step-by-step) widget, and the optional UK GDS Task List widget (uk-gds-task-list) that shows task progress. The GOV.UK Developer Toolkit step-by-step navigation follows the GOV.UK step-by-step navigation pattern guidelines — numbered, collapsible steps, each with one or more task that links out to a question-page journey, record producer, portal page, KB article, external service, or offline action. This navigation can be hosted on a sidebar or directly on a landing page, and shows task order or status, depending on the widget configured.

The Step-by-step navigation page pattern widgets can be viewed and cloned from the default page for `uk_gds_missed_waste`. You can clone and copy the page and all its components, then customize it to fit your needs.

> **Note:** Cloned widgets are considered custom and don't benefit from future updates to the widgets they were cloned from. To learn more about cloning or creating widgets, see Developing custom widgets.

Procedure

1. Navigate to **All**.
2. Run script:

```
npx now-sdk build
npx now-sdk install --demoData
```

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3. Verify the post-install correction ran by checking the system log for `[UK GDS fix] done` before continuing.
4. Open the **Widget Editor**, then select an existing widget from the **Select a widget** list.

   For example, select **Error Widget**.

   Note:

5. From the list menu in the widget header, select **Clone [Widget Name]**.

   For example, select **Clone Error Widget**.

6. Enter a name for the cloned widget.

   The widget ID is created automatically based on the widget name.

7. **Optional**: Select **Create test page** to automatically create a page containing the widget.
8. Use the check boxes to show or hide the different components of the widget editor as needed.
9. Make changes to the HTML Template, CSS, client script, server script, or the link function.

   Note: For server-side scripts, you can turn on using the ECMAScript 2021 (ES12) JavaScript mode if your application uses ES5 Standards mode or Compatibility mode. Scripts in applications with the JavaScript mode set to ECMAScript 2021 (ES12) use ECMAScript 2021 (ES12) by default. For more information, see Turn on ECMAScript 2021 (ES12) mode for a script.

10. To enable a preview of your widget, select the eye icon from the menu bar to **Enable Preview**.
11. Select **Save**.

    Note: If you clone a widget that uses the Angular ng-template, you must manually clone the template and change the name of the template reference in the widget.

Result

The cloned widget is created and can be added to any page that has been created in the portal. Adding a widget to a page creates a new Widget Instance that can be modified separately, and changes will appear on that page **only**. For information on how to add portal widgets to page(s), see Configure the GOV.UK Design System Service Portal Pages.

Configure Widgets Instance Options for GOV.UK Design System Service Portal pages

You can use widget instances to configure the location, properties, and CSS specific to that instance of the widget. Create unique instances of widgets by configuring the options for each instance.

Before you begin

A page must already be created with widgets added to it. For information on how to create or edit a portal page and add widgets, see Configure the GOV.UK Design System Service Portal Pages. You can also configure the existing widget instances on a base system page. For more information on the base system pages that come with the GOV.UK Developer Toolkit, see Configure the GOV.UK Design System Service Portal Pages.

Role required: admin, sp_admin

About this task

Each widget added to a page becomes its own instance. Because widgets are reusable and can appear on different pages to enable the user to do different things, the application of a widget on

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a page is referred to as a Widget Instance. The page loads with content represented by instances of a widget specific to that page.

Widget instances get their logic from the base widget template, client scripts, server scripts, and depending on the widget, CSS.

You can have several instances of the same widget on a page, and each instance of the widget you configure remains unique. For example, each instance of a Knowledge widget on a page could map to a different knowledge base, or be organized in a different way.

Adding a widget to a page creates a new Widget Instance, as well as a record on the Widget Instances [sp_instance] table with the following information:

- A reference to the widget
- A reference to the column of the page where the widget is located
- The configuration for a widget in the form of pre-defined form fields and an **Additional Options** field in JSON format

You can use widget instances to configure the location, properties, and CSS specific to that instance of the widget.

Note: For widgets that do not contain any information by default, you must configure the options for their widget instances before they will appear on a portal page.

For more information on configuring widget instances, see Configure Widgets Instance Options for GOV.UK Design System Service Portal pages.

For information on how to clone and edit a default GDS Service Portal widget, see Customize Widgets for GOV.UK Design System Service Portal pages.

Procedure

1. Navigate to **All** > **Service Portal** > **Service Portal Configuration**
2. Select **Designer**.
3. Select the page with the widget instance(s) you want to configure.
4. In the Service Portal Designer, move to a widget instance and select the **Edit** icon.
5. In the instance options window, fill in the fields to configure the widget instance.
6. Select **Save**.

Configure the GOV.UK Design System Service Portal Page Patterns

Configurable page patterns are best-practice design solutions that combine reusable components to help users complete specific, goal-oriented actions through government services. By default, the GOV.UK Developer Toolkit comes with a pattern library that conforms to the Gov.UK Design System guidelines, and can be copied and used for specific user tasks. Use the base system example page included with the GDS Service Portal to get started configuring with patterns.

Page patterns let you combine different configurable components to help a constituent using your services to complete a task. That task might involve entering information, like an address, household information, or ID number, or it might involve helping users upload a file or submit a request. Patterns can be used to request specific information or actions from constituents, to guide them in completing tasks or confirming details, or simply to relay a message or provide information.

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Patterns often use one or more reusable components, such as widgets or catalog items, and explain how they are adapted to the context. You can use the base system patterns provided with the GOV.UK Developer Toolkit in their default state, or you can clone, modify, or develop custom page pattern journeys to better fit your needs.

There are two pages available for use with the GDS Service Portal that conform to the Gov.UK page pattern guidelines:

- Report an abandoned vehicle
- Report a missed waste collection

Both sample tiles should appear on the catalog page by default, alongside the two record producers they sit next to.

Step-by-Step navigation journey pattern (widget)

The step-by-step navigation page pattern guides users through an end-to-end user flow in sequential stages, with each step providing links to the content needed to complete that step. Step-by-step navigation is useful when:

- A user is completing a journey that has a specific start and end point
- There are steps that require the user to engage with multiple guidance elements or complete multiple transactions
- The steps or tasks need to be completed in a specific order

A step-by-step navigation journey can link guidance and information from different sources, agencies, and services, and can be completed in either a single session, or allow a user to return to the navigation at multiple points in time. In the GOV.UK Developer Toolkit, it is presented as a GDS Service Portal reusable widget that conforms to the Gov.UK Design System page pattern, containing numbered, collapsible steps, each with one or more task links out to a question-page journey, record producer, portal page, KB article, external service, or offline action. This widget can be enabled and customized, and can either be rendered in the right-hand sidebar of pages that are part of the step-by-step navigation, or displayed on a page as a standalone.

For more information on how to configure and customize the step-by-step navigation pattern widgets, see Add a step-by-step navigation widget to a GOV.UK Design System Service Portal page

Question journey pattern

The question journey page pattern is a forms experience where the questions are surfaces one by one on the UI, and the user can see their responses at the bottom and make changes to them. In the GDS Service Portal, this pattern is followed whenever you need to ask users questions within the service, and must include a back link, page heading, and continue button. It asks one question per page, ensuring that users are presented with a clear goal for each interaction.

For more information on configuring question journeys and page patterns, see Configure the GOV.UK Design System Service Portal Page Patterns.

Confirmation pattern

Confirmation pattern pages are ones where a user sees the confirmation page after submitting their answer to the last question.

Configure the GOV.UK Design System Service Portal Question Page Pattern Journey

Configurable portal widgets provide you with the ability to configure the behavior, content, and layout of the GOV.UK Design System Service Portal by configuring widget settings and instance

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options. Use the base system widgets included with the GDS Service Portal to get started configuring portal pages.

The GDS Service Portal question pages are formatted around the GOV.UK "one question per page" page pattern journey. Page patterns are "best practice design solutions to user-specific focused tasks." A citizen answers a short series of pages, each with one question, and when the constituent selects Submit, a case is created and every answer is recorded as a summary comment within the case.

This app ships the following two examples that may be cloned and used as a template. Both sample tiles should appear on the catalog page by default— "Report an abandoned vehicle (GDS-question-pages-pattern example)" and "Report a missed waste collection (GDS-question-pages-pattern example)" — alongside the two record producers they sit next to.

Journey	Case table	Questions	Mapped to case columns
Report Abandoned Vehicle (Private Property)	`sn_gsm_service_request_case`	13	9
Report a Missed Waste Collection	`sn_gsm_government_service_case`	13	5

A constituent filling out a form using the default GDS Service Portal question page journey will see the following:

1. A journey **tile** on the services catalog page, beside the ordinary request forms.
2. A **landing page** explaining the service, with a **Start** button. Each question journey needs its own landing page.
3. A series of **question pages**, one question at a time, with Back links.
4. A **full summary of questions and answers** before submitting.
5. A **confirmation**.

A constituent filling out a form using the default GDS Service Portal question page journey will see the following:

- **A short description naming the journey**. For example, an agent will see:

```
Report Abandoned Vehicle (Private Property)
 (GDS-question-pages-pattern example): someone
          has left a car outside my house
```

  The journey name comes first so an agent knows which service the case was opened under.
- **Selected answers written to real case fields**(address, postcode, contact) so they can be searched, filtered and reported on.
- **A comment listing every question and answer**, including answers that aren't written to a field. An answer only becomes reportable if a matching column exists on the case table.
- **A link to a read-only copy of the submitted journey**, rendered in the portal as the constituent answered it, with any uploaded files as download links. Only the citizen who submitted it, and staff who can read the case, can open that view.

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Configure the GOV.UK Design System Service Portal Question Page Pattern Journey

Use the question page pattern as a template to set up a question journey for your constituents using the GDS Service Portal.

Before you begin

Before creating a service journey, plan the following:

1. The citizen-facing service name.
2. Introductory guidance.
3. The target case table.
4. The question pages or sections.
5. The questions in each section.
6. Which questions are mandatory.
7. The control required for each question: text, text area, number, date, Yes/No, radios, dropdown, checkboxes, reference lookup, or attachment.
8. Which answers must map to case fields.
9. Who should be able to discover and start the service.
10. A short outcome-oriented service name, such as **Report a blocked public footpath**.

Role required: admin

Procedure

1. Navigate to **Assessments** > **Metric Types** to view the Classic Assessment metric-type list, where you will create a metric type with the following values:

Field	Value
Name	Citizen-facing journey name
Active	true
Evaluation method	Survey
Publish state	Published
Portal pagination	Category
Schedule type	On demand
Allow retake	false, unless the service explicitly requires it
Roles	Empty
Source table	The case table selected during planning
Introduction	Introductory guidance for the citizen

Save the record and copy the **sys_id**, which is the journey identifier used in the portal URLs.

a. After saving, re-open the record and verify the following:

- `roles` is empty. The **OOTB Create Survey Records** business rule may add the `survey_admin`and `survey_reader`. Remove those roles if they appear.
- `schedule_type` is `on_demand`.

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- `publish_state` is `published`.
- `source_table` is populated before mapping questions to fields.

Note: Creating the metric type normally creates a default metric category with:

- A name that matches the journey name character-for-character
- Order `1`
- Empty questions

Do not delete this category. It does not render as a citizen-facing page, but the assessment engine uses it to resolve the journey. Verify it exists by viewing the metric type's related lists, or from **Assessments** > **Metric Types** > **Categories**.

2. Create an assessment metric category for each page or logical group of questions.

   For each category, set the fields to the following values:

Field	Guidance
Metric type	The journey created in Step 1
Name	Page heading (e.g, `Location details`)
Order	Sequential values with substantial gaps (e.g., `100, 200, 300`)

   Because portal pagination is set to category per GOV.UK GDS guidelines, each category is rendered as a separate question page.

3. Create assessment metrics under the appropriate category.

   For each question, configure the following values:

Field	Guidance
Metric type	The journey metric type
Category	The question-page category
Question	Citizen-facing question text
Name	same as Question
Method	Assessment
Condition question	`Always`, unless conditional logic is deliberately configured
Active	`true`
Mandatory	As required
Scored	`false` (for normal service-request questions)
Weight	`10` (suitable for non-scored questions)
Order	Sequential values with substantial gaps (e.g., `100, 200, 300`)
Source field	Optional case field mapping

   The following is a list of supported question types that allow for one-question-per-page organization.

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Desired control	Metric datatype	Additional setting
Text input	`string`	String option `short` or `wide`
Textarea	`string`	String option must be `multiline`
Number	`long` or `percentage`	—
Date	`date`	Uses the browser's native date input
Yes/No radios	`boolean`	—
Single checkbox	`checkbox`	—
Dropdown	`choice`	Add metric definitions. For a small list, use a `scale`radio group instead of a `choice` dropdown, in line with GOV.UK guidance.
Radio group	`scale` or `numericscale`	Add metric definitions. For a small list, use a `scale`radio group instead of a `choice` dropdown, in line with GOV.UK guidance.
Checkbox group	`multiplecheckbox`	Add metric definitions
Reference autocomplete	`reference`	Set the reference table
File upload	`attachment`	—

Note: Conditional questions are supported only within the same category/page. Set **Depends on** to the controlling question, and **Displayed when** to the option values that reveal the dependent question. Classic Assessment cannot skip a later category based on an answer from an earlier page.

4. Add the options for the choice questions; for `choice`, `scale`, `numericscale`, and `multiplecheckbox` questions, add assessment metric definitions through the question's related list.

   For every choice option, set the following values:

Field	Guidance
Metric	Enter the question text.
Display value	Enter the citizen-facing option label.
Value	Enter the stable internal value.
Order	Sequential values with substantial gaps (e.g., `100, 200, 300`)

5. Map the question answers to case fields in the case table.

   To copy an answer into a case field, set the question metric's `Source field`.

   To proceed, both of these conditions must be met:

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a. The metric type has the correct **Source table**.

b. The selected field exists on that table and accepts the question's value.

For example, when the target is `sn_gsm_service_request_case`, address answers can be mapped to fields such as `street`, `city`, `province`, or `zip`, **if** those fields exist on that table.

Inherited fields are valid mappings, but fields defined only on a child table are not available when the journey targets its parent. Verify the effective field set for the selected target table in **System Definition** > **Tables & Columns** before saving the mapping.

Unmapped answers are still included in the case's question-and-answer summary, but they are **not** available as separate reportable case fields. An answer only becomes reportable if it contains a matching field in the table.

Set the source table before mapping any questions. If the source table is changed later, the OOTB **Wipe Metric Source Fields** rule can clear every mapping in the journey. Re-open all questions and restore their Source field values after any source-table change.

6. Configure a dedicated assessment page for case creation.

The shared `ukgds_assessment` page is useful for testing, but its widget options are shared by every journey using that page. Do not set a journey-specific case table on the shared instance unless every journey on it should create the same kind of case.

For a configuration-only service:

a. Open Service Portal → Service Portal Configuration → Designer.

b. Clone the existing `ukgds_assessment` page.

c. Assign a unique page ID, for example `ukgds_blocked_footpath_assessment`.

d. Open the UK GDS Assessment widget instance options on the cloned page.

e. Set **Metric type sys_id** (`metric_type_sys_id`) to the metric type created in Step 1.

f. Set **Case target table** (`case_target_table`) to the intended case table.

g. Set **Allow resume** according to the service policy.
`True` lets a citizen resume an in-progress assessment.

h. Enable or disable the step indicator, inline answer summary, section descriptions, and question guidance as required.

i. If completed submissions should link to the read-only answer view, set **Case view page ID** to `ukgds_assessment_view`.

j. Save and test the cloned page directly.

Because the widget instance pins `metric_type_sys_id`, the cloned page URL does not need the `type` parameter. The configured `case_target_table` supplies the journey-to-case registration that would otherwise require a source-code map entry.

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7. After submitting, locate the newest case on the configured target table.
   Verify that:
   - A case was created on the expected table.
   - `opened_by` identifies the submitting citizen.
   - The short description identifies the journey.
   - `correlation_id` contains the assessment instance sys_id.
   - Mapped answers populated the intended case fields.
   - The case comments contain the complete question-and-answer summary.
   - Attachments are available to the agent where applicable.

Configure a GOV.UK Design System Service Portal citizen-facing landing page

Create a catalog anchor landing page that lets constituents find a question-page journey on the GDS Service Portal.

Before you begin

Role required: admin

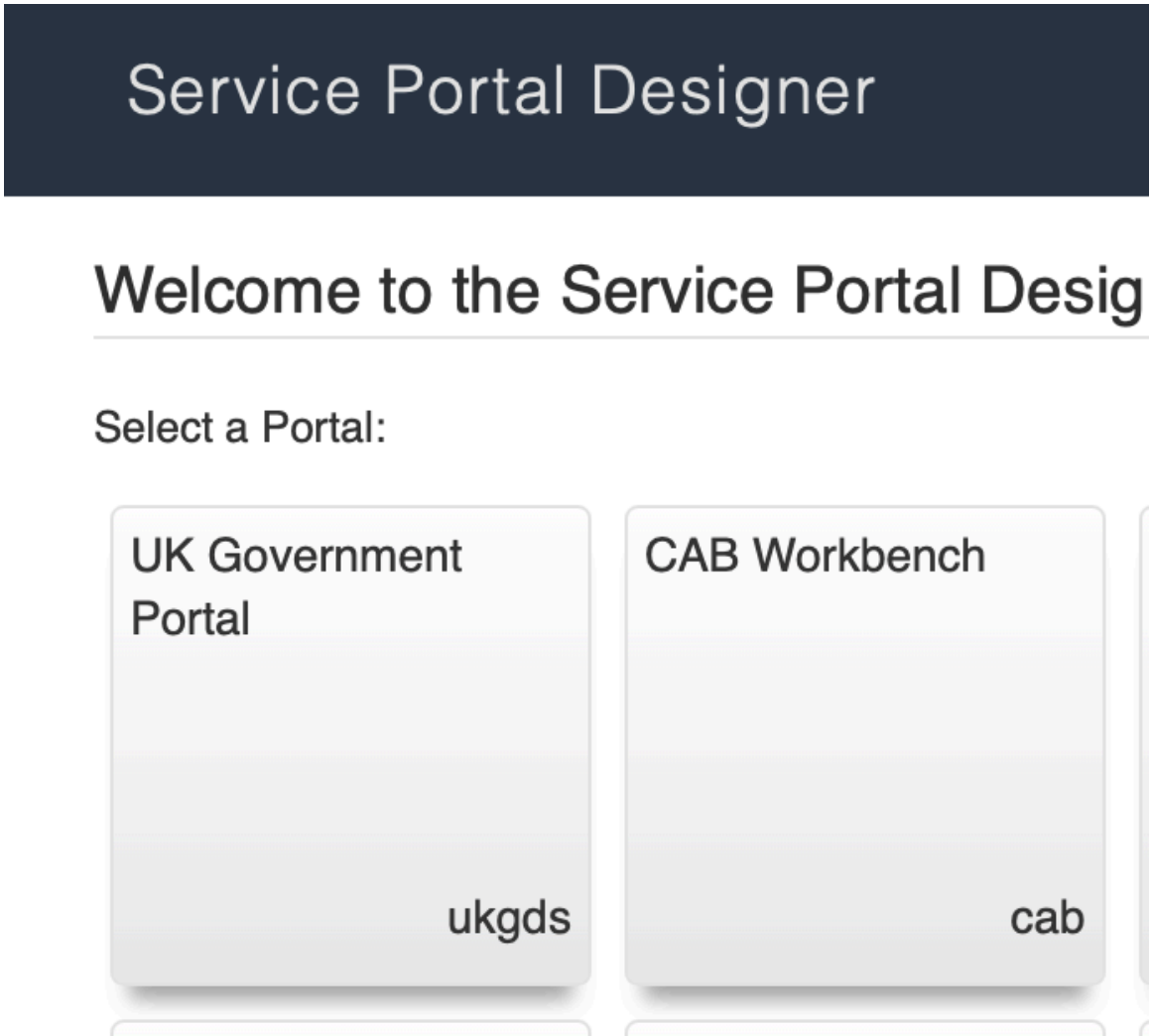
About this task

A question or service request journey lives on its own instance page, and, by default, without an anchor, nothing in the catalog will point at it and render it reachable. Create a catalog anchor item on the services page (by default, `uk_gds_services`) to ensure that the question or service request journey appears as a listed catalog item. You can use **Service Portal Designer** to create or copy a page.

Procedure

1. Navigate to **All** > **Service Portal** > **Service Portal Configuration**.
2. Select **Designer**.
3. Select UK Government Portal to switch to editing or designing pages for the GDS Service Portal.

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4. From the Service Portal Designer, select an existing GOV.UK journey landing page, and select **Copy**.
5. Give it a unique page ID, such as `uk_gds_blocked_footpath`.
6. Update the heading and introductory content.
7. Configure its Start link to open the dedicated assessment page created for the question journey.
   For more information, see the last step of this procedure: Configure the GOV.UK Design System Service Portal Question Page Pattern Journey.
8. Restrict the page to **snc_external** and/or **snc_internal**.

   Note: Mark the page public **if** anonymous users are allowed to use the service.

9. To make the journey discoverable from the Services page, create a content item in the Service Catalog by entering the following values:

Field	Value
Name	Journey name
Active	true
Content type	External

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Field	Value
URL	`?id=<landing_page_id>`
Access type	Restricted
Catalog	UK Government catalog
Category	Appropriate service category
Available on desktop	true
Visible standalone	true

Navigate to the **Not Available For** and **Available For** related lists to set the user criteria for the intended audiences. The user criteria can be set to:

- users with SNC `External` role to allow both registered and unregistered constituents to access the question or service request journey from the catalog landing page.
- users with `snc_internal` role to allow only registered constituents to access the question or service request journey from the catalog landing page.

Note: **Not Available For** overrides **Available For**. Access to the catalog landing page is configured separately.

Configure GOV.UK Design System Service Portal Catalog Items

Use the Service Catalog and the Service Catalog widgets to add or edit existing items to the GDS Service Portal catalog.

Configuration for the Service Catalog portal widgets takes place in the Service Catalog application of the platform.

By default, three catalog items are included in the Service Catalog Widget view as part of the GOV.UK Developer Toolkit GDS portal demo data:

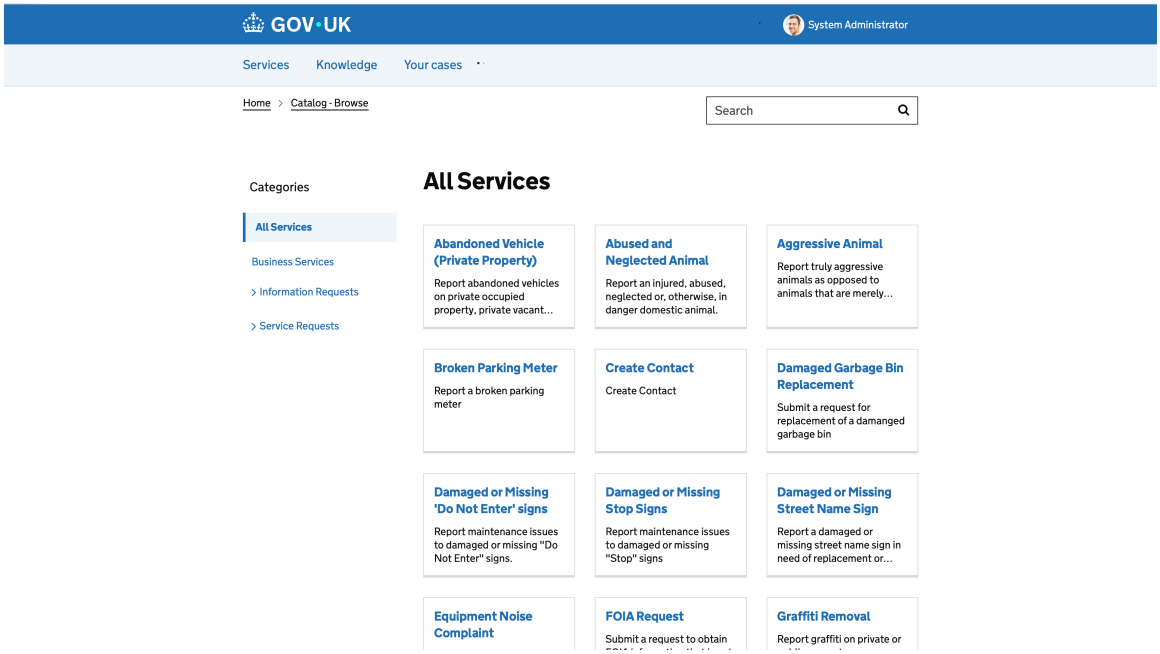
- Abandoned vehicle
- Create contact
- Damaged garbage bin

You can customize what is shown in the Service Catalog widget by adding or removing items in the Service Catalog for the Portal. For more information on creating catalog items to appear in the catalog, see Create or edit a catalog item.

The Catalog Content widget is part of the Service Catalog, and includes a tiled list of all the service items available in the catalog. The items that appear on the page are grouped by category alphabetically. Catalog items and categories are defined in the Service Catalog application in the platform.

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Service Catalog Landing Page



The GDS Service Portal service catalog landing page (uk_gds_services) is the display page for service catalog items or service catalog record producers on the GDS Service Portal. This page provides an interface from where you can access the catalog items, requests, approvals, popular items, recent items, and saved bundles, and is configured by default with the GOV.UK Developer Toolkit. Navigate to **Service Portal** > **Pages** to view and edit the properties of this page.

For information on configuring this page, see Configure the GOV.UK Design System Service Portal Services Page.

Configure GOV.UK Design System Service Portal Knowledge Base

Use Knowledge Base widgets to build a knowledge base for your GDS Service Portal.

Knowledge Management widgets are included as part of the GDS Service Portal. Use these widgets to build a knowledge base for your portal.

You can customize what is shown in the Knowledge base widgets by adding or removing items in the Knowledge base associated with the Portal. For more information on creating catalog items to appear in the catalog, see Create or edit a catalog item.

For more information on knowledge management, see Knowledge Management.

Configure Knowledge Base sources

Associate the GDS Service Portal with one or more knowledge bases to display articles from this knowledge base in the portal widgets.

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About this task

Note:

Users with the knowledge_admin or admin role can configure the widget instance options used on the Knowledge Management Service Portal pages. Use the context menu to access the widget instance options and configure a widget instance. For more information, see Configure Widgets Instance Options for GOV.UK Design System Service Portal pages.

You can also use the external content integration feature to integrate content from various external sources and enable unified knowledge search results. For more information, see Integration with external knowledge sources.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **Knowledge** > **Administration** > **Knowledge Bases** to create or edit the knowledge base you want to associate with the GDS Service Portal.
2. Navigate to **All** > **Service Portals** > **Portals**.
3. In the Knowledge Bases related list, select **Edit**.

   Note: If you don't see the **Edit** option, confirm that you have the GOV.UK Developer Toolkit application scope selected in the application picker.

4. On the **Edit Members** form, select one or more knowledge bases to add to the GDS Service Portal, and move the desired knowledge bases from the available items in the **Collection** column to the **Knowledge Bases List** column.
5. Select **Update**.

Result

The knowledge bases are displayed on the KB homepage for the portal. If no knowledge bases are added, all knowledge bases are available in the portal. If knowledge bases are mapped, only those knowledge bases are available in the portal. All search results and all widgets display results from the mapped knowledge bases only.

What to do next

Determine whether certain users or categories of users can access knowledge bases and knowledge articles by controlling contribute and read access. For more information, see Managing access to knowledge bases and knowledge articles.

Configure GDS Service Portal Search Widgets

Configure and use search widgets for GDS Service Portal so that portal users can take advantage of intelligent query features and find the answers they need.

GDS Service Portal displays search results data within a widget on the search page. Search data displays within a widget on the search page.

To make data searchable from the GDS Service Portal portal, create a search source that fetches that data from a single table within your instance, from multiple tables, or from an external site.

You can also configure **Typeahead** search settings to allow search results to populate the search field based on user input.

Enable AI Search to take advantage of intelligent query features and allow constituents to find the answers they need.

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Configure search sources in GDS Service Portal

Configure search for GDS Service Portal so that portal users can take advantage of intelligent query features and find the answers they need.

Before you begin

Role required: admin or sp_admin

Note: Verify that the scope is set to GOV.UK Developer Toolkit.

About this task

A search source is a record that describes the behavior and source of searchable data. A search source defines:

- Where to retrieve search data from.
- Whether search suggestions can populate the search field based on user input.
- How a search entry displays in the search result page.

Search sources have basic and advanced configurations. A basic search source configuration allows you to define a table or other source (such as a knowledge base) within your instance as a source of searchable data for the search source to query and return results from. An advanced configuration uses a data fetch script that will fetch data from multiple tables or from any number of sources on the web, and return a data result array to the search widget. For information on how to configure an advanced search source that pulls data from external tables or sources, see Tutorial: set up an external knowledge base search source.

By default, the GDS Service Portal has the following search sources configured. This means that when a constituent searches for something using the search widget on the portal, the widget will display results from these three sources, with an option to filter by source.

- Knowledge Base [uk-gds-kb], for which the search results display a list of knowledge articles related to the search.
- Services [uk-gds-service-catalog], for which the search results display a list of available services that match or partially match the search query
- Government Cases [gds-cases], for which the search results display a list of cases related to the search query from the Government Service Case table [sn_gsm_government_service_case] that the user has access to.

To configure a basic search source to query data from a source other than the default (another knowledge base, catalog, table, or other source that is already created within your instance), do the following.

Procedure

1. In the platform UI, navigate to **Service Portal** > **Portals** and select the portal you want to add search sources to.
2. From the **Search Sources** related list, select **New** to add a search source.
3. Define the fields on the **Search Source** form.

Search Source form

Field	Description
Name	The display value for the search category.
ID	The record ID. The value should be unique, and should not include any spaces or special characters.

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Field	Description
Application	The scope of the search source. By default, this field will display GOV.UK Developer Toolkit and cannot be edited.
Roles	Define user roles to access this search source. Select the pencil icon ( ) to configure user roles.
Search page template	The HTML template that displays the search results. If defining a basic search source, you don't need to change the default template. For an example of a modified template, see Tutorial: set up an external knowledge base search source.

4. Complete the fields on the **Data Source** tab.

Field	Description
Is scripted source	Adds an advanced data fetch script. If configuring an instance table or knowledge base as the data source (basic configuration), do not select the checkbox for this option.
Data fetch script	Script defining the endpoint and API calls to fetch data. This field is only visible when **Is scripted source** is selected. For an example of a data fetch script, see Tutorial: set up an external knowledge base search source. **Note:**
Facet generation script	Script defining search facets for a scripted search source. This field is only visible when **Is scripted source** is selected. **Note:**
Table	Select a table from the list that you want to draw your results from. You can select any table in the platform. **Note:** Only indexed tables return search results. Learn more: Configure a table for indexing and searching.
Conditions	Filters results based on defined conditions. For example, Active is True. This field is optional.
Primary display field	Select which field you want to display on the search results page. For example, Name.
Display fields	Select additional fields to display on the search results page. For example, User ID, Email, and City.
Paginate results	Paginates search results. True by default. If Is scripted source is selected, the value updates to false. Define the maximum number of results per query for the search source in the Search Page widget or Faceted Search widget instance options.

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5. Configure **Typeahead** settings to allow search results to populate the search field based on user input.

Field	Description
Enable typeahead	Allows typeahead functionality. If you don't want to integrate typeahead into your search source, unselect the check box.
Advanced typeahead config	Optionally add an advanced typeahead script to configure the way search results display. For more information, see Create an advanced typeahead template.
Typeahead glyph	Adds an icon beside each typeahead result.
Page	Defines the service portal page on which the selected results will be displayed. For example, if **form** is configured, a selected typeahead result opens in a form. If **uk_gds_case_details**is configured, a selected typeahead result opens on the case details page.

6. Select **Submit**.

Result
Search capabilities are enabled throughout the portal, and constituents can use search to see results from various sections of the portal the next time they log in.

Enable AI Search in GDS Service Portal

Configure the ServiceNow AI Search application for GDS Service Portal so that portal users can take advantage of intelligent query features and find the answers they need.

Before you begin
Role required: admin or sp_admin

Note:

AI Search is enabled in Service Portal for all new and zBoot customers by default.

If you're upgrading to Brazil as an existing customer, AI Search is inactive in Service Portal by default. You can enable it by updating the portal record.

If you leave AI Search inactive, the portal uses the legacy search experience.

About this task
Using AI Search, GDS Service Portal users can find answers with features like auto-complete search queries, natural language support, and typo handling.

Procedure

Result
AI Search is enabled throughout the portal, and constituents can use AI Search the next time they log in.

The Search Sources related list is hidden from the portal record. You now define search sources in the AI Search application. For more information, see Defining search sources and Link a search source to a search profile.

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To use AI Search for knowledge articles, you can keep the default **Knowledge Bases** search source or select a custom one.

What to do next

Search widgets that you cloned or customized before a system upgrade may not be compatible with AI Search. You can resolve this issue by running a fix script that reclassifies search widget instances. For more information, see Reclassify cloned or customized search widgets.

Manage role-based access to pages and widgets in GOV.UK Design System Service Portal

Control user access to components of the GOV.UK Design System Service Portal.

Control who accesses your portal and what they can see in the following ways:

- Authentication: Configure login and single sign on for users
- Limit page access by role: Use roles to limit the users who can see a page.
- Public pages: Use the public check box on a page record to make the page publicly accessible.

> **Note:** Some portal pages that are installed by default are marked public. Filter your list of Service Portal pages for Public [is] true to identify these pages. Setting the Public value to false will prevent these pages from being publicly available.

You can see all roles for a page by navigating to **All** > **Service Portal** > **Pages** and using the Roles or [is] Public column to filter.

For more information on configuring portal access by role, see Managing portal access.

Configure page security in the GDS Service Portal by role

Set up GDS Service Portal pages to be public, or filter them by role.

Before you begin

Role required: admin or sp_admin

About this task

Public pages won't require a user login; anyone can access them. All other pages require user authentication.

By default, the GDS Service Portal pre-login page is set to public. All other pages require authentication and the following roles (snc_external, snc_internal) to be viewed and accessed.

Procedure

1. In the Service Portal configuration page (**Service Portal** > **Service Portal Configuration**), open the Page Editor.
2. In the Select Page list, search for the page to apply page security to.
3. Select the highest level node in the tree view.
4. Configure page security.
   - To make a page public, select the **Public** check box. All users can access pages marked as **Public**.
   - To limit access to a certain role, add the roles in a comma separated list. Users without the role listed can see links to the page if they appear in the portal. Trying to open the page results in a "page not found" error.

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> **Note:** If you select **Public** and add a list of roles, the page is still accessible by any user.

- To create a draft page that only administrators can see while the page is still in development, select **Draft**. Users must have the admin role to see any pages in draft. Users without the admin role see a "page not found" error.

5. Select **Save**.

What to do next
Follow the steps in Configure widget security to configure security for the widgets on your page.

Configure widget security in the GDS Service Portal by role

Configure widget security to verify that your GDS Service Portal widgets are being accessed only by the intended audience.

Before you begin
Role required: admin or sp_admin

About this task
There are several ways to configure widget security:

- Restrict the widget to users with a login only (authenticated users)
- Restrict the widget to users with certain roles only
- Restrict which tables a public widget can access and return data from for guest (unauthenticated) users

When you configure widget security, configure the page security accordingly so that users can access the widget via the page on which it appears. For more information, see Configure page security.

Procedure
1. Navigate to **All** > **Service Portal** > **Widgets**.
2. Open the record of the widget to configure.
3. On the form, configure the widget security.

Option	Procedure
Restrict the widget to authenticated users	Unselect the check box next to **Public** and leave the **Roles** field blank. This will display the widget to ALL users with a login.
Restrict the widget to certain roles	**a.** Clear the **Public** check box. **b.** Next to **Roles**, select the edit icon ( ). **c.** In the Roles related list, select a role by moving it from the **Available** list to the **Selected** list. **d.** Select **Done**.

4. Select **Update**.

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What to do next
For more information on configuring portal access by role, see Managing portal access.

Configure the Grants Management Portal

As an admin, you can configure various elements of the Grants Management Portal.

About this task
You can customize the Grants Management Portal by following these procedures or by using guided setup for Public Sector Digital Services Core application.

Before you begin
Role required: admin

Procedure

Navigate to **All** > **Service Portal** > **Service Portal Configuration**.

Some of the components that you can customize include:

- **Branding**: Configure the portal branding to give the Grants Management Portal its own look and feel. For example, you can give your portal a name and add your logo.
- **Menus**: Configure the portal header menu to set up the main menu, one of the main navigation controls for your users.
- **Homepage**: Assign a homepage to the portal.
- **Widgets**: Use Service Portal widgets to define the content in your portal.
- **Roles**: Configure page security by role to either set up pages to be public (no login required) or to filter them by user role.

Approve registration for a business contact or organization in Grants Management Portal

As an admin, you can approve or reject the registration of a new business contact or organization, submitted through the Grants Management Portal.

Before you begin
Role required: admin

Procedure

1. Navigate to **All** > **Self Service** > **My approvals**.
2. Select **Requested Approvals**, where you'll find the organization registration that has requested to be added.
3. Select the record to open the detail view, where you can see the business information and approval fields.
4. You can choose to **Approve** or **Reject** registration for the business contact or organization. Your selection will be reflected in the **State** field.

Extend capabilities of Public Sector Digital Services

Extend the capabilities of Public Sector Digital Services.

Install the Performance Analytics and Reporting Solution for Public Sector Digital Services

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Install the Performance Analytics and Reporting Solution for Public Sector Digital Services

Install the content pack for the Public Sector Digital Services Platform Analytics Solution from the ServiceNow Store.

Before you begin

- Activate the full, subscription version of Performance Analytics on the instance where you are activating this Platform Analytics Solution. You can activate Performance Analytics on a non-production instance without purchasing a subscription. For more information, see Activate your Performance Analytics subscription.
- Install Public Sector Digital Services Core from the ServiceNow Store.

Role required: admin

Procedure

1. Navigate to **All** > **System Applications** > **All Applications** > **ServiceNow Store**.
2. Browse for Performance Analytics Content Pack for Public Sector Digital Services and verify that you have the necessary valid entitlements.

   You need a HI account and permission to request applications for the instances under consideration. The HI account and the instance need to be part of the same company. For more information, see Install a ServiceNow Product on the ServiceNow Store.
3. Search for `Performance Analytics Content Pack for Public Sector Digital Services`.
4. Install the application.

Domain separation and Public Sector Digital Services

Domain separation is not supported for Public Sector Digital Services. Domain separation enables you to separate data, processes, and administrative tasks into logical groupings called domains. You can control several aspects of this separation, including which users can see and access data.

Support level: No support

- The domain field may exist on data tables but there is no business logic to manage the data.
- This level is not considered domain-separated.

For more information on support levels, see Application support for domain separation.

Related topics

Domain separation for service providers

Integrating Public Sector Digital Services with other applications

Extend the capabilities of Public Sector Digital Services and connect with other departments to assist with case resolution by integrating with other applications.

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Public Sector Digital Services provides integrations with the following applications:

Field Service Management

Financial Services OperationsDocument Processor

Integrating the Public Sector Digital Services application with the Field Service Management application enables you to create and view all work orders and appointments related to your case, depending on the business needs.

Integrating Public Sector Digital Services with the Financial Services OperationsDocument Processor

Identity Provider Integration plugin

The Identity Provider Integration plugin (sn_idp_integ) allows provides ServiceNow developers with the data model foundation to develop OpenID Connect (OIDC) integrations that authenticate and verify constituent identities through approved government OpenID Connect (OIDC) providers — ID.me (US), myID (Australia), GOV.UK One Login (UK) — replacing email-only identification. It standardizes and enhances the identity verification process, delivering a provider-neutral OIDC framework for capturing and storing key identity provider data, including identity provider issuer, identity provider ID, and assurance level from OIDC providers on top of the existing Multi-Provider SSO (MPSSO) plugin.

Identity Provider Integration adds a new standalone table that stores OIDC identity-provider metadata for externally authenticated users. The table supports more than one identity-provider association per user over time. This enables agencies to reliably identify constituents, prevent duplicate accounts, and protect sensitive data via role-based ACLs. The model supports multiple providers per user, and enforces provenance-based write access to downstream user fields.

Two MPSSO configurations support the workflow:

- Login Authentication Configuration — the standard "Sign in with ID.me" login flow, configured with scopes that only require self-reported user attributes,
- Verification configuration— the "Verify with ID.me" step-up flow, configured with scopes that require remotely verified user attributes

Both Provider configurations return OIDC claims through the same MPSSO transform script, validated against the OIDC provider sandbox. The script, which runs a find-or-create logic before a new user is created from an OIDC provider login, checks if this identity already exists by searching the `sn_idp_integration` table for a Identity Provider Issuer + Identity Provider ID match, reusing the existing, verified user instead of creating a duplicate if it finds a match, or creating a new user record table entry if there's no match.

For more information about the Identity Provider Integration plugin, see Identity Provider Integration Data Model.

Related topics

Install Identity Provider Integration

Install Identity Provider Integration

You can install the Identity Provider Integration plugin (sn_idp_integ) if you have the admin role.The application includes demo data and installs related ServiceNow® Store applications and plug-ins if they aren’t already installed.

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Before you begin

- Ensure that the application and all of its associated ServiceNow Store applications have valid ServiceNow entitlements. For more information, see Get entitlement for a ServiceNow product or application.
- Certain features in the Identity Provider Integration (sn_idp_integ) application are available based on your ServiceNow entitlements and may require installation of other ServiceNow applications and activation of specific plug-ins.
- Review the https://store.servicenow.com/sn_appstore_store.do#!/store/application/f8a220de91070710f87783bc40ac6f96/1.0.1 application listing in the ServiceNow Store for information on dependencies, licensing or subscription requirements, and release compatibility.

Role required: admin

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the PSDSInvestigative Case Management application (com.sn_gsm_icm) using the filter criteria and search bar.

   You can search for the application by its name or ID. If you cannot find the application, you might have to request it from the ServiceNow Store.

   In the list next to the **Install** button, the versions available to you are displayed.
3. Select a version from the list and select **Install**.

   In the Review Installation Details dialog box, any dependencies installed with your application are listed.
4. If you're prompted, follow the links to the ServiceNow Store to get any additional entitlements for dependencies.
5. **Optional:** If demo data is available and you want to install it, select the **Load demo data** check box.
   Demo data are the sample records that describe application features for common use cases. Load the demo data when you first install the application on a development or test instance.
6. Select **Install**.

Integration with Field Service Management

The Public Sector Digital Services integration with the ServiceNow® Field Service Management application enables you to view work order and work order task information from a public sector case.

Integrating the Public Sector Digital Services application with the Field Service Management application enables you to create and view all work orders and appointments related to your case, depending on the business needs.

The Field Service Management application users can view the constituent, household, business, and contacts on work orders and work order tasks in the Field Service Management application.

Product use rights included with this application

With the integration with Field Service Management, Public Sector Digital Services agents can create and view all work orders and appointments related to their cases.

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Field Service Management field agents can view relevant Public Sector Digital Services data from work orders with the right roles.

External users with the snc_external and other relevant Public Sector Digital Services and Customer Service Management (CSM) roles can view all case-related work orders and appointments related to their accounts.

Configuring the integration with Field Service Management

To configure the Public Sector Digital Services application integration with the Field Service Management application, complete these steps:

1. Activate the Customer Service with Field Service Management plugin. (com.snc.csm_fsm_integration).
2. Add UI actions to the PSDS case type tables where needed. Depending on your experience, you can also add some actions to relevant playbooks.
3. Add the Work orders related list to the PSDS case type tables for all relevant views on Classic UI and or Workspace.
4. If you're an FSM field agent, you can view the relevant PSDS customer data from the work orders by being assigned with the right customer data viewer roles.

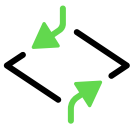
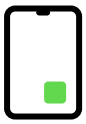
> **Note:** An administrator must assign the appropriate PSDS customer data viewer roles to FSM field agents so that they can view the relevant PSDS customer data from work orders. For more information on roles, see Roles installed with Public Sector Digital Services.

Using Public Sector Digital Services

Learn how public sector agencies help constituents and businesses with digital services and resolve their issues.

Government Service Portal	Playbooks	CRM Workspace
		
Report issues, request public records, search for information, and seek assistance from a government service agent— all within a customizable interface.	Guide government agents through the lifecycle of a license and permit, social benefit program, government record, public information, or non-emergency service request case.	Set up CSM Configurable Workspace and expand the Workspace UI to optimize agent government service processes.

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Portals	Virtual Agent	Mobile Agent
		
A one-stop shop to manage and submit public service requests, or applications.	Use Virtual Agent to create chatbot conversations tailored to public sector use cases.	Enable the development of public sector applications for the delivery of digital services to constituents, such as benefits, licenses, and service requests.

ServiceNow Otto®

Use ServiceNow Otto for PSDS to enhance user productivity and efficiency through proactive experiences using generative AI.

Using Playbooks Public Sector Digital Services

A playbook provides government service agents with step-by-step guidance through the life cycle of a public service request case. Use Playbooks to fulfill requests for license and permits, government records and other public information, or non-emergency service requests.

A playbook takes a workflow and breaks it into multiple stages or lanes. Each stage in a playbook includes one or more activities, or steps, for you to complete. Stages can also include automated activities, such as auto-sending an email to a customer when a stage or activity is complete. When using a playbook, you can:

- View the playbook stages and activities.
- Select an activity and perform the work to complete that activity.
- Mark an activity as complete and move to the next activity or stage.
- Complete the stages and activities to resolve the case.

The following applications are available with Public Sector Digital Services that enable you to create and use playbooks:

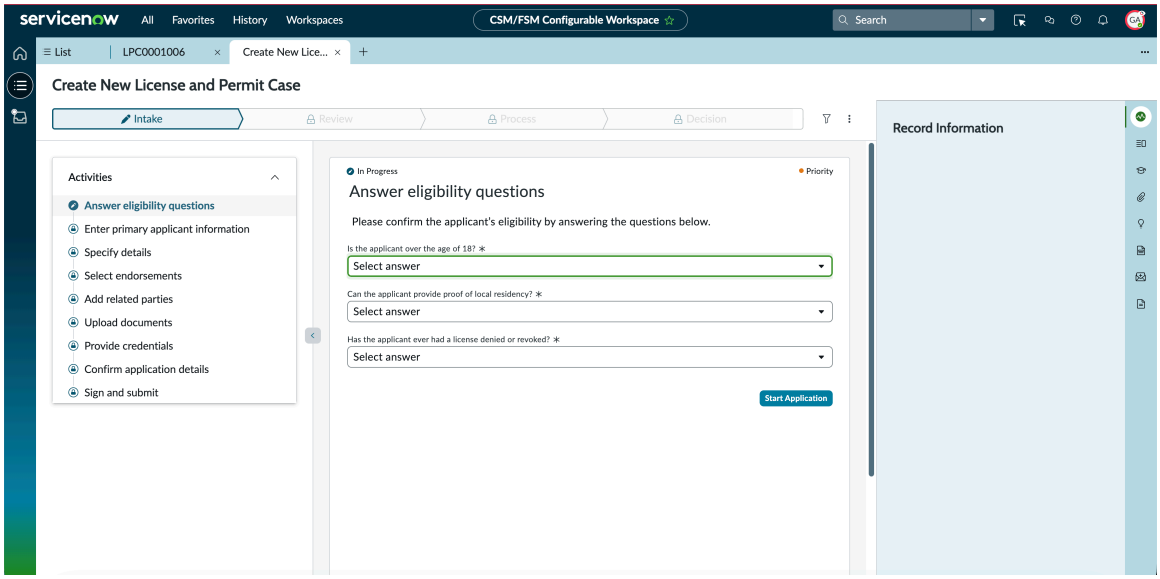
- Grants Management
- Social Benefits Playbook
- License and Permit Playbook

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- Information Request Administration
- Service Request Playbook

The corresponding playbook for each case type automatically appears in the **Playbook** tab when you create an public service request case as an agent in the CRM Workspace, or when a constituent puts in a request through the Government Service Portal.

The workflows for a type of case and the activities that you need to resolve these cases are in the playbook. By using a playbook, you can visualize the entire life cycle of the public service case workflow.



Playbook stages

Each playbook contains four stages (Intake, Review, Process, and Decision) and several activities in each stage. Below is a diagram illustrating the base playbook workflow. This workflow can be modified to match a specific public service request use case, depending on what your agency offers.

The base Playbook workflow stages are listed in the following table.

Playbook stages

Task	Description
Intake	Guides you through the record creation process by capturing the details of the request and assigning it to the right agent.
Review	Acts as a checkpoint for duplicate cases and provides you with an opportunity to review the case details.
Process	Guides you through the activities for request fulfillment.
Decision	Captures and communicates the decision and any supporting information to the constituent and any other agents or involved parties.

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Playbook layout

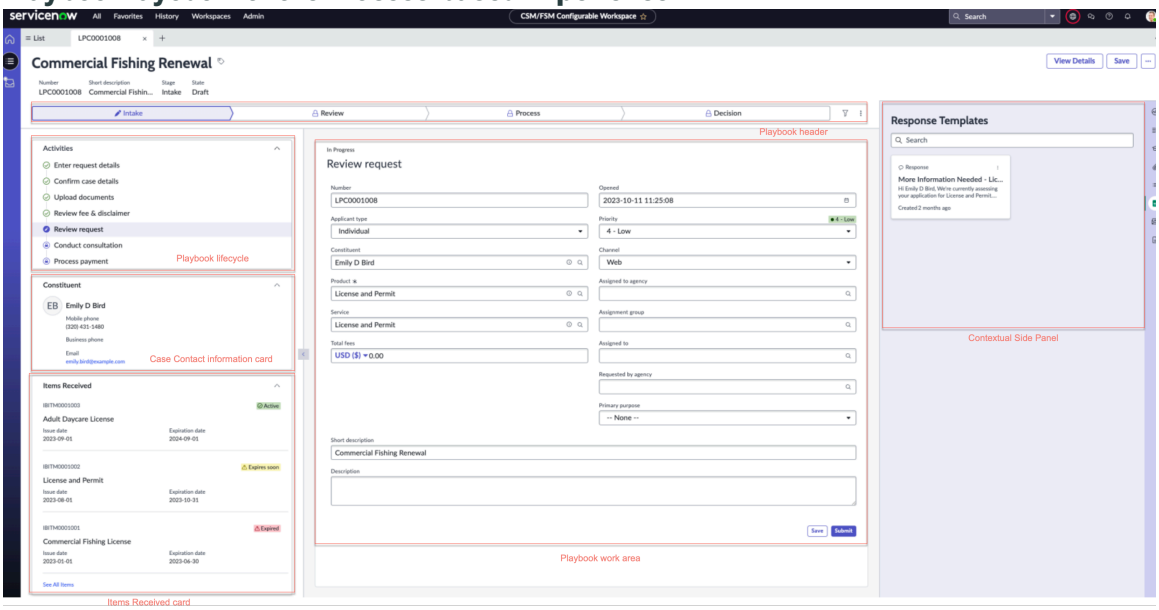
A playbook is made up of several areas, including the playbook life cycle, the playbook work area, and the contextual side panel. The activity view determines how the stages and activities appear in the playbook.

The default activity view for Playbooks in Public Sector Digital Services is the process-based experience view. This view, which is shown in the following example, shows constituent or business information and case task information at the forefront of the playbook work area as you work on it.

The process-based playbook layout shows the following features:

- A horizontal stage picker that gives the agent a complete view of the entire process and where they currently are in that process. Agents can use the stage picker to track their overall progress as they work on cases.
- Record information on the left side of the page, such as the contact information that is always available.
- Related records in the contextual side panel supported by the dynamic related records component.

Playbook layout with the Process-based Experience



The following table shows the components shown in the Playbook workspace.

Playbook components

Playbook area	Description
Playbook header	• Appears at the top of the playbook. • Shows the title of the playbook and a horizontal stage picker that displays progress through the playbook stages.

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Playbook components (continued)

Playbook area	Description
	• Includes a filter that you can use to filter the activities by the assigned user or the activity status. • Includes the Playbook Actions menu that you can use to select the playbook-level and activity-level actions.
Playbook Lifecycle	• Appears in a panel on the left side of the playbook. • Displays a list of the activities for each stage. • With the horizontal stage layout, you can expand or collapse the entire list of activities for the current stage.
Playbook work area	• Appears in the middle of the playbook. • Displays the card for the current activity.
Contextual side panel	• Appears on the right side of the playbook. • Includes the tabs that you can use to display the following types of information: ○ Case or case task activity stream. ○ Ribbon information such as the case overview, customer details, timeline, and service level agreements (SLAs). ○ Dynamic related records. For more information, see Dynamic related records.
Case Information Contact Card	• Contact information for the constituent or business that submitted the request. • Appears in a panel on the left side of the playbook.
Service Request Map Card	• *`Service Request Playbook`* **only** • New component of the process-based playbook layout. • Appears after the intake stage, if the sn-geo-map plugin is installed, and Google API key is configured.
Items Received Card	• *`License and Permit Playbook`* **only** • Appears on the left side of the playbook. • Shows licenses/permits that are active, expired, and expiring soon, and the time remaining on each one.

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Public Sector Digital Services Playbooks

The Public Sector Digital Services platform includes the following playbooks:

Social Benefits Playbook

The Social Benefits Playbook application provides an end-to-end workflow for handling requests for social benefits submitted by public sector end users. The application includes the following:

- Packaged playbook that deploys out of the box case types, playbooks, business logic, SLAs, notifications and more to automate workflow to orchestrate the process and help agents resolve requests faster and efficiently.
- Customizable catalog of pre-built social benefit options that constituents and businesses can choose from on the Government Service Portal.
- Extendable data model through service definitions.

License and Permit Playbook

The License and Permit Playbook application provides an end-to-end workflow for handling license and permit requests submitted by public sector end users. The application includes the following:

- Packaged playbook that deploys out of the box case types, playbooks, business logic, SLAs, notifications and more to automate workflow to orchestrate the process and help agents resolve requests faster and efficiently.
- Customizable catalog of pre-built license and permit request options that constituents and businesses can choose from on the Government Service Portal.
- Extendable data model through service definitions.

Information Request Administration

The Information Request Administration application provides an end-to-end workflow for handling public record and information requests submitted by public sector end users. The application includes the following:

- Service catalog of pre-built, information request options that constituents and businesses can choose from on the Government Service Portal.
- Automated workflow process that agents use to resolve information requests faster and efficiently.
- If using Advanced Work Assignment, an Information Request service channel that admins can use to automatically route information requests to designated agents.

Service Request Playbook

The Service Request Playbook application provides an end-to-end workflow for handling non-emergency service requests submitted by public sector end users. The application includes the following:

- Service catalog of pre-built, non-emergency request options that constituents and businesses can choose from on the Government Service Portal.
- Automated workflow process that agents use to resolve non-emergency service requests faster and efficiently.

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- If using Advanced Work Assignment, a Service Request service channel that admins can use to automatically route non-emergency service requests to designated agents.
- Pre-built Virtual Agent conversation topic that enables constituents and businesses to use Virtual Agent to submit non-emergency service requests.

For more information on installing and configuring Playbooks for Public Sector Digital Services, see Configuring Public Sector Digital Services.

Using Social Benefits Playbook

If you're a social benefits case agent or manager, you can use the Social Benefits Playbook for Public Sector Digital Services to manage and resolve requests for social benefits.

The Social Benefits Playbook automatically appears in the **Playbook** tab when you create a social benefits request case by using the CRM Workspace. A playbook takes a workflow and breaks it into multiple stages or lanes. Each stage in a playbook includes one or more activities, or steps, for you to complete. Stages can also include automated activities, such as auto-sending an email to a customer when a stage or activity is complete. When using a playbook, you can:

- View the playbook stages and activities.
- Select an activity and perform the work to complete that activity.
- Mark an activity as complete and move to the next activity or stage.
- Complete the stages and activities to resolve the case.

The workflows for a type of case and the activities that you need to resolve these cases are in the playbook. By using a playbook, you can visualize the entire life cycle of the information request workflow.

Playbook stages

Like other Public Sector Digital Services playbooks, this playbook contains four stages (Intake, Review, Process, and Decision) and several activities in each stage. Below is a diagram illustrating the base Social Benefits Playbook workflow. This workflow can be modified by an admin to match a specific social benefits use case.

The Social Benefits Playbook stages are listed in the following table.

Playbook stages

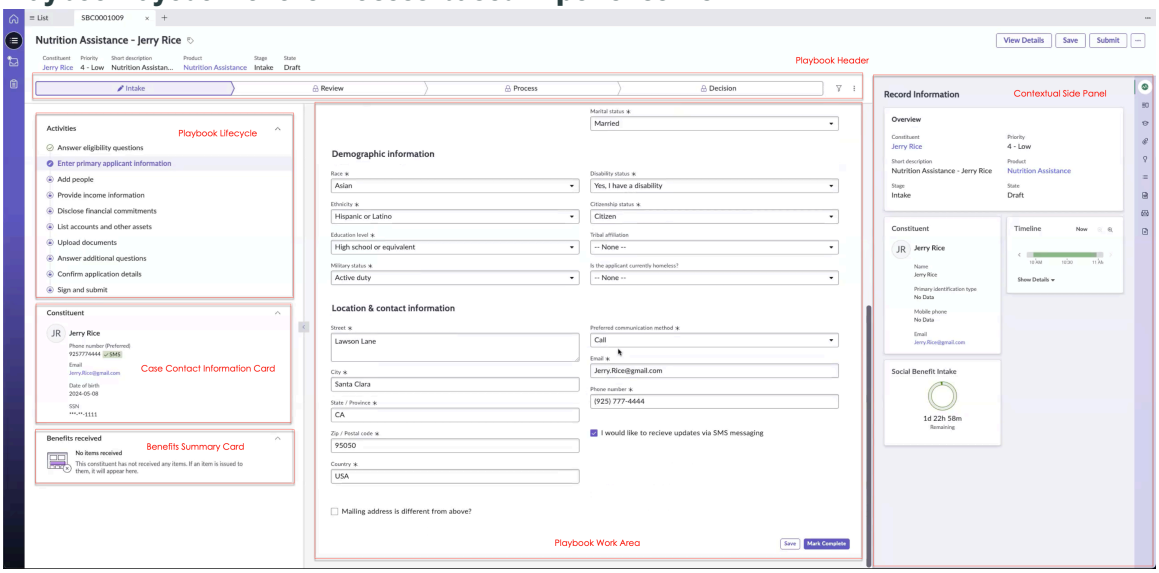
Task	Description
Intake	Guides you through the record creation process by capturing the details of the social benefits request and assigning it to the right agent.
Review	Acts as a checkpoint for eligibility verification and provides you with an opportunity to review the case details.
Process	Guides you through the activities for social benefits request fulfillment.
Decision	Captures and communicates the decision and next steps to the constituent and any other agents or involved parties.

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Playbook layout

The following figure shows the components that you can see in the Social Benefits Playbook workspace.

Playbook layout with the Process-based Experience view



Playbook components

Playbook area	Description
Playbook header	• Appears at the top of the playbook. • Shows the title of the playbook and a horizontal stage picker that displays progress through the playbook stages. • Includes a filter that you can use to filter the activities by the assigned user or the activity status. • Includes the Playbook Actions menu that you can use to select the playbook-level and activity-level actions.
Playbook Life-cycle	• Appears in a panel on the left side of the playbook. • Displays a list of the activities for each stage. • With the horizontal stage layout, you can expand or collapse the entire list of activities for the current stage.
Playbook work area	• Appears in the middle of the playbook. • Displays the card for the current activity.
Contextual side panel	• Appears on the right side of the playbook. • Includes the tabs that you can use to display the following types of information:

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Playbook components (continued)

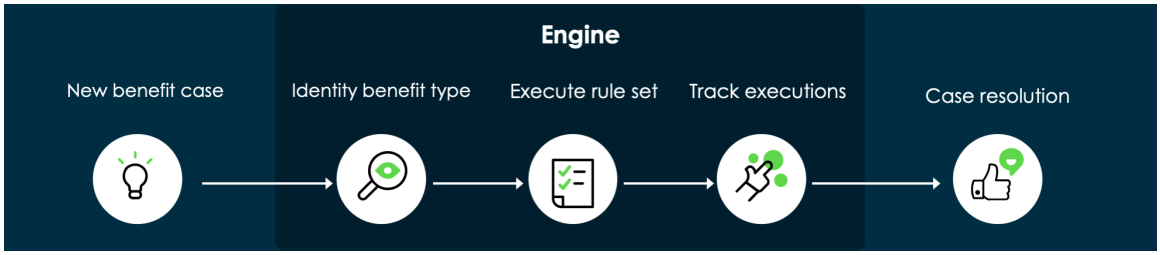
Playbook area	Description
	○ Case or case task activity stream. ○ Ribbon information such as the case overview, customer details, timeline, and service level agreements (SLAs). ○ Dynamic related records. For more information, see Dynamic related records.
Case Information Contact Card	• Contact information for the constituent or business that submitted the request. • Appears in a panel on the left side of the playbook. • Displays the preferred communication method indicated by the applicant. • Allows an agent to start an email draft directly from the playbook workspace by selecting the applicant's email address. • Displays the identity type provided by the applicant, either SSN, Driver's License, Medicare, or State Identification number.
Items Received Card	• Appears on the left side of the playbook. • Shows licenses/permits that are active, expired, and expiring soon, and the time remaining on each one.
PaCE policy card	• Appears in the contextual side panel during the Propose decision activity of Process stage. • Provides agents additional insight into eligibility criteria via a link to a corresponding KB article containing the full text of the policy.

Using the Social Benefits Playbook Eligibility Rules Engine (PaCE)

Define and manage rules to determine eligibility and calculate benefits.

The Social Benefits Playbook uses an Eligibility Rules Engine, a series of pre-defined policies that are associated to a specific benefit, to determine whether they are eligible to apply for one or more social benefit programs that your agency offers. These policies are a set of pre-defined rules and logic that determines whether a constituent will receive benefits or not. Using a set eligibility rules criteria for Social Benefits Playbook may aid in deflecting applications for which the applicant is not eligible for a specific social benefit program. These policies can be updated as rules and regulations surrounding these social benefit programs change. The policies in Social Benefits Playbook Eligibility Rules Engine are powered by Policy as Code Engine (PaCE).

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A PaCE policy is a set of pre-defined rules and logic that determines the desired behavior of an application or a service. When invoked, the rules in the policy are applied on the provided input, and a decision is reached. In PSDS, a PaCE policy represents a set of eligibility criteria that must be satisfied for a constituent to receive benefits. When invoked, the rules in the policy are applied to the case, and an auto-calculated eligibility recommendation is provided to the agent. For more information on understanding PaCE within the Social Benefits Playbook, see Understanding Policy as Code Engine (PaCE) and the Social Benefits Playbook.

You can use the eligibility rules engine to manage the life cycle of a policy and create, update, review, and execute policies. With the eligibility rules engine, you can:

- Evaluate any changes to ensure they meet your organization's policy management requirements.
- Create a policy, modify policy information, or copy a policy and its version to a new policy.
- Create a new policy version by copying an existing policy version and modifying it.
- View and define mapping information for any policy.
- Review executed policy activity and execution history for policies and policy versions.
- Use tags and categories to manage your policies more efficiently.

If the applicant fulfills all the criteria set forth by the eligibility rules engine policies, then the applicant can proceed with their application, or the agent can proceed in creating a case for the applicant. Case information must satisfy the conditions of each pre-defined policy for a constituent's request to be deemed 'eligible.' If the information from the case is found to be non-compliant with one or more policies, and the applicant does not fulfill at least one of the eligibility criteria, neither an agent nor an applicant can proceed in creating a case for the social benefit program, and their request will be labeled as "not eligible."

The Social Benefits Playbook Eligibility Framework:

- Allows governments to design an eligibility system and institute updates as laws and regulations change
- Reduces manual effort from agents by providing auto-calculated eligibility recommendations
- Allows governments to render consistent and accurate benefit decisions

Workflow

Understanding Policy as Code Engine (PaCE) and the Social Benefits Playbook

PaCE enables you to manage, administer, and audit eligibility rules (policies) from a centralized location.

Policy as Code Engine (PaCE) is a powerful, low code rules engine capable of processing rules in seconds. This engine allows process owners and admins to create and maintain the rules that drive eligibility determination and benefits. The rule-sets created within this rules engine are called policies.

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A PaCE policy is a set of pre-defined rules and logic that determines the desired behavior of an application or a service. When invoked, the rules in the policy are applied on the provided input, and a decision is reached. This decision-making is the main function of PaCE and helps determine if a policy is compliant or non-compliant. The decision is then relayed to the software calling service or application, so that it can act on it to enforce a desired behavior.

With PaCE, admins and process owners can:

- Create a policy to build out the logic determining eligibility and benefits.
- Use templates to pre-define logic and data sources, quick-starting policy creation
- Map policies to one or more benefit types
- Pilot new policies using a test playground
- Audit policy executions with built-in reporting of decisions, statuses, and processing times.

PaCE also allows a full life cycle management of policies, reuse of existing policies, Testing and validation of policies, and central automation of compliance, audits, and regulatory processes. Policy developers can view and understand an existing policy, make and assess changes, and decide if a policy can be used as a baseline for another policy. They can also use PaCE before debugging to understand how the policy should work, and why it is not working as expected.

PaCE can be used to:

- Make decisions (compliant or non-compliant) based on a change in the application or service.
- Automate execution of policies.
- Standardize policies so that they can be shared and reused within a service and across services.
- Collect evidence and proof of compliance for audit purposes. This feature can be used by internal auditors to automate the process of collecting evidence for governance and risk requirements.

The Social Benefits Playbook Eligibility Rules Engine, powered by PaCE, evaluates case data against pre-defined eligibility rules for faster decision-making.

Resolving a social benefits case using Social Benefits Playbook

You can use playbooks to create cases and to complete the tasks and activities that are needed to resolve specific types of cases.

Note: Verify that the Social Benefits Playbook application, which is separate from the Public Sector Digital Services Core application, has been installed and configured. For instructions, see Install and configure the Social Benefits Playbook application.

By default, the following stages are available to you as a government service agent in the Social Benefits Playbook in the CRM Workspace.

- Intake
- Review
- Processing
- Decision

Case Stages in Social Benefits Playbook

The Social Benefits Playbook experience starts with the **Intake** stage. This stage is the default playbook stage for a new social benefits request case.

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Use this playbook stage to gather and confirm information about the applicant, the social benefit program being applied for, and whether the applicant is eligible for this type of social benefit program. You can also request additional information from the applicant at this stage, upload additional documents, add additional beneficiaries, and schedule a interview, if needed.

If the case was submitted by a constituent through the Government Service Portal, the constituent will be able to upload documents, review proposed benefits, and respond to interview requests before the case continues. At the end of the Intake stage, agents must review and verify the information provided before proceeding.

The playbook continues with the **Review** stage. In this stage, agents must review and verify the information provided, verify supporting documents and credentials (and flag any for follow-up), check for duplicate requests, and set up any interviews needed for social benefit program approval. You can move the case to the next stage when all documents have been verified and there are no pending case tasks.

The playbook continues with the **Process** stage. In this stage, the agent proposes their decision. The case might then be routed to a higher-tier agent, who can assess the entire application, create any additional case tasks, request or perform additional interviews, add or request additional information, or simply approve or deny based on the information provided. Once requests for any additional information and any open case tasks are complete and all agents have reached a decision, the case is moved to the **Decision** stage.

The final stage of the Social Benefits Playbook is the **Decision** stage, where the status of the decision is relayed to the constituent. The status of the social benefit application is changed to **Granted**, and the social benefit program can be routed to the constituent. A notification is sent to the applicant via the Government Service Portal, letting them know that their application has been has approved.

Complete the Intake stage in Social Benefits Playbook

Complete the Intake stage as your first step in resolving a case using the Social Benefits Playbook.

Before you begin

Role required: sn_gsm.constituent_agent, sn_gsm.relationship_agent, sn_gsm.government_service_manager, sn_gsm.business_agent, sn_gsm.agency_constituent_agent, sn_gsm.agency_manager, sn_gsm.agency_agent

Procedure

1. In the CRM Workspace, navigate to **Lists** > **Social Benefits** > **All**.
2. Select **New** to create a case.
3. Select **Create Case**.
   The Social Benefits Playbook opens and initiates the first activity for collecting the request details and determining eligibility for the social benefits offered by your agency.
4. On the Answer eligibility questions activity card, confirm the applicant's eligibility using the eligibility questions, and select **Check Eligibility**.
   The benefits card will display possible eligibility for each of the social benefits offered by the agency. An agent can review the details of the case to make a final determination.
5. If the applicant is eligible for the benefit associated with the application currently open, select **Start Application**.
   If the applicant is not eligible for the benefit associated with the application currently open, the application cannot move forward. The benefits card displays other social benefit programs the applicant may be eligible for, in addition to or instead of the benefit associated with the application currently open.

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6. On the form, fill in the fields with the primary applicant's personal and financial information, including SSN, demographic information, location, and contact information.
7. **Optional:** Select the checkbox if the customer has indicated that they would prefer to be contacted via SMS.
8. Select **Mark Complete** to continue to the next activity.
9. **Optional:** Add any people who would also be receiving benefits along with the primary applicant.
   You may add more than one. Related people may include spouses, dependents, children, household members, or any person who may be receiving benefits along with the primary applicant.
10. Select **Mark Complete** to move to the next activity.
11. **Optional:** If anyone in the applicant's household has a source of income, select **Yes**, and on the form, fill in the fields.
    If no one in the applicant's household has a source of income, select **No**.
12. **Optional:** If anyone in the applicant's household has any pre-tax contributions on any of their current income, select **Yes**, and enter any pre-tax contributions that affect income for the applicant's household.
    If no one in the applicant's household has any pre-tax contributions, select **No**.
13. Select **Mark Complete** to move to the next activity.
14. **Optional:** If anyone in the applicant's household has any expenses or financial commitments, select **Yes**.
    If no one in the applicant's household has any expenses or financial commitments, select **No**
15. **Optional:** On the form, fill in the fields, doing so for each expense item.
    You may add more than one. Select **Add Item** to add multiple expenses to the list.
16. Select **Mark Complete** to move to the next activity.
17. If anyone in the applicant's household has any financial accounts, assets, or resources, select **Yes**, and on the form, fill in the fields.
    You may add more than one. Select **Add Item** to add multiple expenses to the list. If no one in the applicant's household has any financial accounts, assets, or resources, select **No**.
18. Select **Mark Complete** to move to the next activity.
19. Upload any supporting documents that verify the identity of the applicant and any related parties, or provide additional context for their request.
    A case is created with the information the agent has provided on the applicant thus far, and is now routed back to the applicant via the Government Service Portal. There, they can upload any applicable identity documents, credentials, or supporting documentation required for their application. The case continues once the applicant has uploaded these documents. Required documentation varies by request.
20. Once the applicant has uploaded supporting documentation via the Government Service Portal, review the attachment(s) and select **Mark Complete** to move to the next activity.
21. On the form, select the options that best describe the applicant's criminal history, communication preferences, and accessibility needs.
22. Select **Mark Complete** to move to the next activity.
23. Review the application in its entirety and correct any errors before submitting the application.
24. Select **Request Signature** to request a signature from the constituent via the **Sign and Submit** activity on the Government Service Portal.
    If the constituent does not respond, you may move this application directly to the **Decision** stage, where the case can be closed.

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Once the constituent has completed the **Sign and Submit** activity via the Government Service Portal, the case is automatically moved to the next activity.

25. **Optional:** Select **Apply Now** to use information from the current application to apply for other social benefits programs that the applicant may be eligible for.
    You may apply for more than one. Each new application opens in a new browser tab. The option to create an appended case expires after a specified amount of time.
    A child Social Benefits case is appended to the case of the original benefit application, and the benefit card updates based on the status of the new application.
26. **Optional:** Select **Skip** to skip this activity.
    The case state of the additional benefit application changes to "Not submitted". A new case can no longer be created and appended to the primary application.
27. Select **Mark Complete** once the desired applications are submitted.
    The case is moved to the **Review** stage, and the **Intake** stage is marked complete.

Complete the Review stage in Social Benefits Playbook

Complete the Review stage as your second step in resolving a case using the Social Benefits Playbook.

Before you begin

Role required: sn_gsm.constituent_agent, sn_gsm.relationship_agent, sn_gsm.government_service_manager, sn_gsm.business_agent, sn_gsm.agency_constituent_agent, sn_gsm.agency_manager, sn_gsm.agency_agent

Procedure

1. Review the information collected during the intake stage, and confirm that the information is complete and correct.

   If the agent is selecting the case from an unassigned queue, they will see the option to **Assign to Me**. If the case is auto-assigned, they will see the option to **Mark Complete**.
2. Correct any errors before submitting the application, and select **Mark Complete**.
   Select the pencil icon to navigate back to an Intake stage activity that needs to be corrected.
3. Verify there are no duplicate benefit applications for the primary applicant, and select **Mark Complete**.
4. Review and verify the files and supporting documentation attached to the application.
   Here, you can flag documents for further verification, request additional documents, or close the case by moving it directly to Decision.
5. Select **Mark as Complete** once all documents have been verified and any flagged documents have been resolved.
6. Select a date and time in the dropdown menu to recommend an interview slot if an interview is required to process the application, and select **Request Interview**
   The interview is now routed to the applicant, who can accept, reject, or respond to the interview request via the Government Service Portal. The case continues once the applicant has responded to the request. If an interview is not required, select **Skip**.
7. Select **Move to Process** once the interview is complete.

Result

The case is now moved to the **Process** stage.

Complete the Process stage in Social Benefits Playbook

Complete the Process stage as your third step in resolving a case using the Social Benefits Playbook.

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Before you begin
Role required: sn_gsm.constituent_agent, sn_gsm.relationship_agent, sn_gsm.government_service_manager, sn_gsm.business_agent, sn_gsm.agency_constituent_agent, sn_gsm.agency_manager, sn_gsm.agency_agent

Procedure
1. Review the auto-calculated eligibility assessment and the benefit summary card, which uses application information as an input to provide guidance on the benefit amount for which an applicant may qualify.
   This engine utilizes information such as the total household income, assets owned, expenses, etc. as inputs into the calculation.
2. Select **Grant** or **Deny** in the Proposed Decision dropdown to propose a decision for the applicant's social benefits case.
3. Enter a justification for the proposed decision in the description box, then select **Propose Decision**.
   The case is now routed to an approval agent. The Process stage will complete automatically once the decision is approved.

Result
The Process stage is complete and the case is moved to the Decision stage.

Complete the Decision stage in Social Benefits Playbook

Complete the Decision stage as your last step in resolving a case using the Social Benefits Playbook.

Before you begin
Role required: sn_gsm.constituent_agent, sn_gsm.relationship_agent, sn_gsm.government_service_manager, sn_gsm.business_agent, sn_gsm.agency_constituent_agent, sn_gsm.agency_manager, sn_gsm.agency_agent

Procedure
1. Enter the resolution code and cause.
2. Enter resolution notes outlining the case decision for the applicant, or other users on the case watch-list.
3. Select the checkbox for **Add resolution notes to comments** if these notes are to be shown to the applicant.
4. Select **Close** to close and resolve the case.
   A notification is sent to the applicant that lets them know that the request is completed.

Add a beneficiary to a social benefits application in Social Benefits Playbook

As an agent, you can add multiple beneficiaries to an existing request for social benefits. Applicants, or the representatives of an applicant, can also add additional beneficiaries to an application through the Government Service Portal. Beneficiaries are people that share the household or are related to the applicant who will benefit from the assistance being provided.

Before you begin
Role required: admin

Procedure
1. In the CRM Workspace, navigate to **Lists** > **Social Benefits** > **All**.
2. Select **New** to create a case.

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3. Select **Create Case**.
4. On the Answer eligibility questions activity card, confirm the applicant's eligibility using the eligibility questions, and select **Check Eligibility**.
5. If the applicant is eligible for the benefit associated with the application currently open, select **Start Application**.
6. On the form, fill in the fields with the primary applicant's personal and financial information, including SSN, demographic information, location, and contact information, and select **Mark Complete** to continue to the next activity.
7. Add any people who would also be receiving benefits along with the primary applicant. You may add more than one. Related people may include spouses, dependents, children, household members, or any person who may be receiving benefits along with the primary applicant.
8. Select **Mark Complete**.

Using License and Permit Playbook

If you're an license and permits case agent or manager, you can use the License and Permit Playbook for Public Sector Digital Services to manage and resolve requests for licenses and permits.

A playbook provides you with step-by-step guidance through the life cycle of a license and permits request case.

The License and Permit Playbook automatically appears in the **Playbook** tab when you create an license and permit request case by using the CRM Workspace.
A playbook takes a workflow and breaks it into multiple stages or lanes. Each stage in a playbook includes one or more activities, or steps, for you to complete. Stages can also include automated activities, such as auto-sending an email to a customer when a stage or activity is complete.
When using a playbook, you can:

- View the playbook stages and activities.
- Select an activity and perform the work to complete that activity.
- Mark an activity as complete and move to the next activity or stage.
- Complete the stages and activities to resolve the case.

The workflows for a type of case and the activities that you need to resolve these cases are in the playbook. By using a playbook, you can visualize the entire life cycle of the information request workflow.

Playbook stages

Like other PSDS playbooks, this playbook contains four stages (i.e., Intake, Review, Process, and Decision) and several activities in each stage. Below is a diagram illustrating the base License & Permit playbook workflow. This workflow can be modified to match a specific license/permit use case.

The License and Permit Playbook stages are listed in the following table.

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Playbook stages

Task	Description
Intake	Guides you through the record creation process by capturing the details of the license and permit request and assigning it to the right agent.
Review	Acts as a checkpoint for duplicate cases and provides you with an opportunity to review the case details.
Process	Guides you through the activities for the license and permit request fulfillment.
Decision	Captures and communicates the documents and information to the constituent and any other agents or involved parties.

Playbook layout

A playbook is made up of several areas, including the playbook life cycle, the playbook work area, and the contextual side panel. The activity view determines how the stages and activities appear in the playbook.

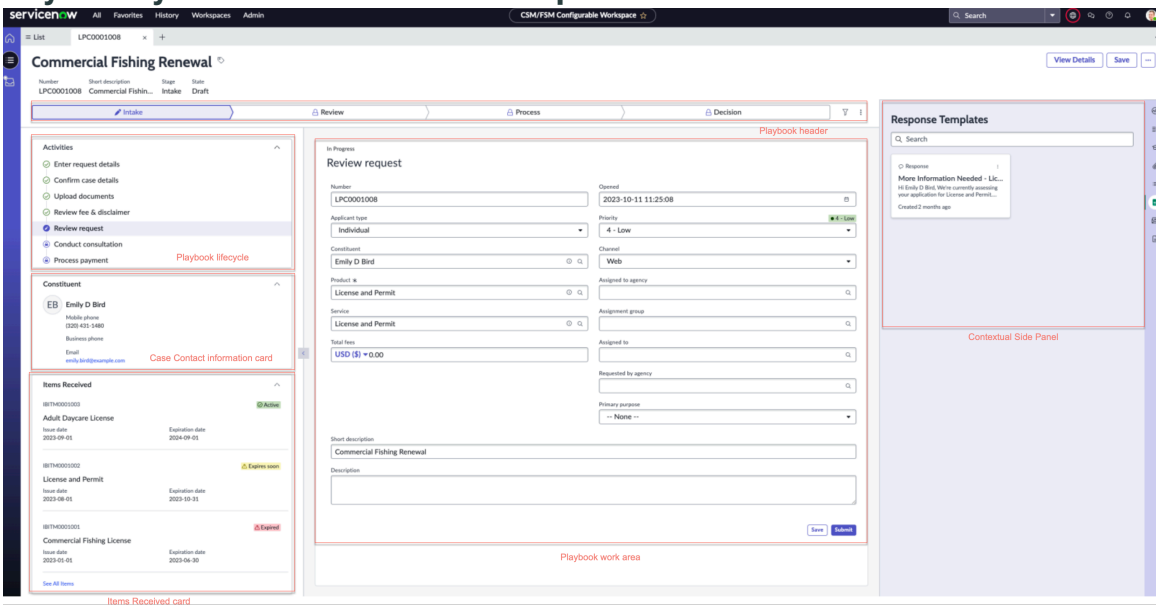
The default activity view for the License and Permit Playbook is the Process-based experience view. This view, which is shown in the following example, shows constituent or business information and case task information at the forefront of the playbook work area as you work on it.

The process-based playbook layout shows the following features:

- A horizontal stage picker that gives the agent a complete view of the entire process and where they currently are in that process. Agents can use the stage picker to track their overall progress as they work on cases.
- Record information on the left side of the page, such as the contact information that is always available.
- Related records in the contextual side panel supported by the dynamic related records component.

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Playbook layout with the Process-based Experience view



The following table shows the components that you can see in the License and Permit Playbook workspace.

Playbook components

Playbook area	Description
Playbook header	• Appears at the top of the playbook. • Shows the title of the playbook and a horizontal stage picker that displays progress through the playbook stages. • Includes a filter that you can use to filter the activities by the assigned user or the activity status. • Includes the Playbook Actions menu that you can use to select the playbook-level and activity-level actions.
Playbook Lifecycle	• Appears in a panel on the left side of the playbook. • Displays a list of the activities for each stage. • With the horizontal stage layout, you can expand or collapse the entire list of activities for the current stage.
Playbook work area	• Appears in the middle of the playbook. • Displays the card for the current activity.
Contextual side panel	• Appears on the right side of the playbook. • Includes the tabs that you can use to display the following types of information:

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Playbook components (continued)

Playbook area	Description
	○ Case or case task activity stream. ○ Ribbon information such as the case overview, customer details, timeline, and service level agreements (SLAs). ○ Dynamic related records. For more information, see Dynamic related records.
Case Information Contact Card	• Contact information for the constituent or business that submitted the request. • Appears in a panel on the left side of the playbook.
Items Received Card	• Appears on the left side of the playbook. • Shows licenses/permits that are active, expired, and expiring soon, and the time remaining on each one.

Resolving a license and permit case using License and Permit Playbook

You can use playbooks to create cases and to complete the tasks and activities that are needed to resolve specific types of cases.

Note: Verify that the License and Permit Playbook application, which is separate from the Public Sector Digital Services Core application, has been installed and configured. For instructions, see Install and configure the License and Permit Playbook application.

By default, the following stages are available to you as a government service agent in the License and Permit Playbook in the CRM Workspace.

- Intake
- Review
- Processing
- Decision

Case Stages in License and Permit Playbook

The License and Permit Playbook experience starts with the **Intake** stage. This stage is the default playbook stage for a new license and permit request case.

Use this playbook stage to gather and confirm information about the requester, the license or permit being requested, whether the requester is eligible for this type of license or permit, and whether they are exempt from the fees associated with the license or permit. You can also request additional information from the requester at this stage, upload additional documents, add additional comments, add related parties, and schedule a consultation through the work notes.

If the case was submitted by a constituent through the Government Service Portal, the constituent will be able to upload documents, and review the fees and disclaimers associated

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with the license or permit application before the case continues. At the end of the Intake stage, agents must enter details about the payment that was processed or waived.

The playbook continues with the **Review** stage. In this stage, you can do the initial troubleshooting on the case, verify supporting documents and credentials, and set up any inspections needed for license or permit approval. You can move the case to the next stage when details are provided in the work notes on the inspections (open work orders or work performed during) or verifying documents.

The playbook continues with the **Process** stage. In this stage, the case might be routed to a higher-tier agent, who can assess the entire request for the license or permit, approve a fee exemption, create case tasks, request or perform additional inspections, and add or request additional information.

Once requests for any additional information and any open case tasks are complete, the case is moved to the **Propose Decision** activity. Additional information may be solicited from the requester at any time during this stage. After the decision, often made by a higher-tier agent, is proposed, it is routed to the original agent, who may request or perform their own additional inspections, and add or request more information. This agent then has the option of confirming or vetoing the decision proposal of the other agent.

The final stage of the License and Permit Playbook is the **Decision** stage. At the Decision stage, the status of the license or permit is changed to **Granted**, and the license or permit can be generated and routed to the constituent. A notification is sent to the requester that lets them know that license or permit approval has been has obtained and the requested license or permit has been digitally generated within the playbook, and delivered via the Government Service Portal.

The requester can then either accept or reject the license or permit. If the requester accepts the outcome, the case is automatically closed. If the requester rejects the solution, the case is reopened, and the agent must propose another outcome. A request for a license or permit may also be conditionally approved, or denied. The agent can specify why in the work notes.

Complete the Intake stage in License and Permit Playbook

Complete the Intake stage as your first step in resolving a case using the License and Permit Playbook.

Before you begin

Role required: sn_gsm.constituent_agent, sn_gsm.relationship_agent, sn_gsm.government_service_manager, sn_gsm.business_agent, sn_gsm.agency_constituent_agent, sn_gsm.agency_manager, sn_gsm.agency_agent

Procedure

1. In the CRM Workspace, navigate to **Lists** > **License & Permit Requests** > **All**.
2. Select **New** to create a case.
3. Select **General License/Permit** under the Service dropdown, and **New License/Permit Request** under the Case Type dropdown.
4. Select **Create Case**.
   The License and Permit Playbook opens and initiates the first activity for collecting the request details.
5. On the Enter Application Details activity card, confirm the applicant's eligibility and select **Continue**.
6. On the form, fill in the fields with the requester's contact information and details of the request.
7. Under Representation, select the checkbox for **Requesting on behalf of someone else**.

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8. Enter the name of the constituent or business that the requester is submitting the application on behalf of, and select **Save**.

   Note: All license/permit co-applicants must have a business contact account associated with your business to be included on a license/permit application. Each contact can create an account by registering on the Government Service Portal, or a government service agent can create a business contact record for them. For information on how agents can create a business contact record from information entered in a License and Permit application, see Create a business contact account from license or permit application data.

9. **Optional:** Select any add-ons, such as permit endorsements.
   You may add more than one. The pricing of the license or permit varies with each selection or combination of selections.
10. Review the fees associated with the requester's choices.
    The fee total changes dynamically based on the options selected. If the constituent or requester is fee exempt, select the **Fee Waiver** checkbox and enter a justification to claim an exemption for them.
11. Select **Submit** to move to the next activity.
12. Add any additional related parties.
    Related parties may include business partners, managers, or any business contact who may need access to this license/permit. They must be contacts already registered on the Government Service Portal and associated with your business.
13. Select **Mark Complete** to move to the **Upload Documents** activity.
14. Upload any documents that verifies the identity of the requester and the related party, or provides additional context for your request.
    A case is created with the license or permit request information and all related parties, and is now routed to the constituent via the Government Service Portal, where they can upload any applicable identity documents, credentials, or supporting documentation required for this license/permit request. The case continues once the constituent has uploaded these documents. Required documentation varies by request.
15. Once the constituent has uploaded supporting documentation, review the attachment(s) and select **Mark Complete** to move to the **Review Fees & Disclaimer** activity.
    The case is again routed to the constituent via the Government Service Portal, where they can upload fee waiver justification documents, if applicable, or other supporting documentation required for this license/permit request. The case continues once the constituent has uploaded these documents and acknowledged the fees and disclaimers.
16. Once the constituent has acknowledged the fees and disclaimers, the case is moved to the queue, where it can be picked up by another agent in your agency, who will review the request and provide appointment options for the license or permit consultation.
17. Select **Mark Complete** to acknowledge that you have reviewed the request.
18. Enter available times in the work notes.
19. Select **Schedule Consultation**
    The case is again routed to the constituent via the Government Service Portal, where they can accept or reject the times proposed for an interview consultation or inspection.
20. After the consultation, enter any relevant notes about the case in the work notes and select **Mark Complete** to move to the next activity.
21. Payment.
22. Select **Move to Review**.
    The case is moved to the **Review** stage, and the **Intake** stage is marked complete.

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Complete the Review stage in License and Permit Playbook

Complete the Review stage as your second step in resolving a case using the License and Permit Playbook.

Before you begin

Role required: sn_gsm.constituent_agent, sn_gsm.relationship_agent, sn_gsm.government_service_manager, sn_gsm.business_agent, sn_gsm.agency_constituent_agent, sn_gsm.agency_manager, sn_gsm.agency_agent

Procedure

1. Review the files attached to the case, and confirm that the requester has included the required documents to validate their identity by selecting the boxes associated with the document type.
2. Select **Mark as Complete**.
3. Select any exemptions that apply to the case, and select **Mark as Complete**.
   If no exemptions apply to the case, select **No exemption code(s) applicable**.
4. Do one of the following actions depending on whether you have similar or linked completed requests.

Options	Steps
If there are no similar or linked completed requests	Select **Mark as Complete**.
If there are similar or linked completed requests	Review them to see if any are relevant to the current request.

5. Estimate the fees associated with this request by using the fee estimator.
   The fee estimator can only be run once.
6. Enter details on the fee estimate in the work notes, then select **Request Fee Approval**.
   If the requester qualifies for a fee waiver, enter that information here. The fee estimate is now sent to billing to be approved. Once the fee estimate has been approved, mark the step as complete.
7. Select **Send for Requester Approval** to send the fee estimate to the requester.

   This activity will automatically be marked complete once the requester has approved the fee, and the case will be moved to the Process Payment activity.
8. Verify the payment has been sent, and select **Move to Process**.
   The Review stage is now complete and the case is moved to the Process stage.

Complete the Process stage in License and Permit Playbook

Complete the Process stage as your third step in resolving a case using the License and Permit Playbook.

Before you begin

Role required: sn_gsm.constituent_agent, sn_gsm.relationship_agent, sn_gsm.government_service_manager, sn_gsm.business_agent, sn_gsm.agency_constituent_agent, sn_gsm.agency_manager, sn_gsm.agency_agent

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Procedure

1. Upload the documents needed to fill this request by selecting **New Document** or **Link Document**.
2. Move to the next activity by selecting **Prepare for Review**.
3. Enter any additional work notes or details needed for legal review, and then select **Send for Legal Review**.
   A case task is now created and assigned to the Legal Review assignment group for approval. If the uploaded documents are rejected during the legal review, you may need to make changes and request a review again or move the case directly to the Decision stage.
4. After the legal review is complete, select **Mark as Complete**.
   The case is moved to the Final Review Pre-release activity, where the documents and details of the request are reviewed by the Final Review Team assignment group.
5. After the documents have been approved by the Final Review Team, select **Move to Decision**.
   The Process stage is complete and the case is moved to the Decision stage.

Complete the Decision stage in License and Permit Playbook

Complete the Decision stage as your last step in resolving a case using the License and Permit Playbook.

Before you begin

Role required: sn_gsm.constituent_agent, sn_gsm.relationship_agent, sn_gsm.government_service_manager, sn_gsm.business_agent, sn_gsm.agency_constituent_agent, sn_gsm.agency_manager, sn_gsm.agency_agent

Procedure

1. Enter any work notes for the customer or other users on the case watch-list, and then select **Release** to release the information to the requester.
2. **Optional:** If the requester has opted to be notified by mail, in the work notes, verify that the notice has been sent by mail and select **Mark as Complete**.
3. **Optional:** If the requester has opted to be notified by phone, in the work notes, verify that the notice has been sent by phone and select **Mark as Complete**.
4. Review the resolution code and resolution notes, and select **Propose solution**.
   All case tasks must be closed before an agent can propose a solution to the case.
   A notification is sent to the constituent that lets them know that the request is completed. The constituent can either accept or reject the proposal. If the constituent accepts the proposal, the case is automatically closed. If the constituent rejects the solution, the case is reopened, and the agent must propose another outcome.

Track license and permit requests using License and Permit Playbook

Track all the license and permit requests that are assigned to you or other agents in your government agency by using the License and Permit Playbook.

Before you begin

Role required: sn_gsm.constituent_agent, sn_gsm.business_agent, sn_gsm.agency_agent, sn_gsm.relationship_agent, and sn_gsm.service_manager, sn_gsm_lic_prmt.case_task_agent, sn_gsm_lic_prmt.case_task_agent, sn_gsm_lic_prmt.government_service_manager

About this task

When you select a case, a form opens with the following sections:

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- A record of activity on the case, including added attachments or any interactions between the requester and the license and permit request case agent.
- Tasks or actions that need to be taken on the user's part, such as accepting or rejecting a case outcome.
- The case details, including contact information, the case number, and the case's stage and status.
- Any attached files.

Procedure

1. Open the License and Permit Playbook by navigating to Lists in the CRM Workspace.
2. Navigate to the **License and Permit Requests** list and select **All**.
3. In the License and Permit Requests section, select a list that is described in the following table.

License and Permit Request Lists

List	Description
All	All license and permit request cases that the agent has access to.
My Cases	All license and permit request cases assigned to the agent.
My Open	Open cases assigned to the license and permit request case agent.
Unassigned for my group	Cases that belong to any of the license and permit request case agent's groups but haven't been assigned to an agent.

Create a License and Permit request on behalf of a constituent or business

Government service agents can create requests on behalf of constituents or business from the Government Service Portal. Constituents can also create and submit license/permit requests on behalf of someone else through the Government Service Portal.

Before you begin

Role required: sn_gsm.constituent_agent, sn_gsm.relationship_agent, sn_gsm.government_service_manager, sn_gsm.business_agent, sn_gsm.agency_constituent_agent, sn_gsm.agency_manager, sn_gsm.agency_agent

Procedure

1. In the CRM Workspace, navigate to **Lists** > **License & Permit Requests** > **All**.
2. Select **New** to create a case.
3. Select **General License/Permit** under the Service dropdown, and **New License/Permit Request** under the Case Type dropdown.
4. Select **Create Case**.
   The License and Permit Playbook opens and initiates the first activity for collecting the request details.
5. On the **Enter Application Details** activity card, confirm the applicant's eligibility and select **Continue**.
6. On the form, fill in the fields with the requester's contact information and details of the request.
7. Under Representation, select the check box for **Requesting on behalf of someone else**.
8. Enter the name of the constituent or business that the requester is submitting the application on behalf of, and select **Save**.

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Note: All license/permit co-applicants must have a business contact account associated with your business to be included on a license/permit application. Each contact can create an account by registering on the Government Service Portal, or a government service agent can create a business contact record for them. For information on how agents can create a business contact record from information entered in a License and Permit application, see Create a business contact account from license or permit application data.

9. **Optional:** Select any add-ons, such as permit endorsements.
   You may add more than one. The pricing of the license or permit varies with each selection or combination of selections.
10. Review the fees associated with the requester's choices.
    The fee total changes dynamically based on the options selected. If the constituent or requester is fee exempt, select the **Fee Waiver** check box and enter a justification to claim an exemption for them.
11. Select **Submit** to move to the next activity.
12. Add any additional related parties.
    Related parties may include business partners, managers, or any business contact who may need access to this license/permit. They must be contacts already registered on the Government Service Portal and associated with your business.
13. Select **Mark Complete**.

Result

A case is created with the license or permit request information and all related parties, and is now routed to the constituent via the Government Service Portal. In the Government Service Portal, agents can upload any applicable identity documents, credentials, or supporting documentation required for this license/permit request. The case continues once the constituent has uploaded these documents.

Using the contextual side panel in License and Permit Playbook

The contextual side panel provides you with the tools that can help you to research and resolve problems about your cases.

The contextual side panel in the CRM Workspace gives you access to information that can help you resolve license and permit request cases.

It includes a column of icons that you can select to access different types of information.

The following table shows you the tabs that you should see on the contextual side panel in the License and Permit Playbook.

Contextual side panel tabs

Field	Description
Record information icon 	Relevant information about a record. In License and Permit Playbook, the ribbon displays the record information, constituent details, the case timeline, and the active and inactive service level agreements (SLAs). For more information on how to view information about the ribbon in playbooks, see Viewing

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Contextual side panel tabs (continued)

Field	Description
	the ribbon information in License and Permit Playbook.
Activity stream icon	Ability for you to communicate with requesters and make internal notes about the work that is done on a record.
Attachments icon ()	Ability for you to attach knowledge base content to a response to the requester in the activity stream.
Dynamic Related Records icon ()	Related records in the contextual side panel that dynamically change based on the context of the current record or playbook activity.
Email template icon ()	Reusable content for the subject line and message body of email notifications.
Template icon ()	Standard content that is related to resolving the issue. To create a template, select the template icon  .

Use response templates in License and Permit Playbook

Respond to cases by using the response templates in the contextual side panel in CRM Workspace. Good templates save you time by eliminating repetitive work. Response templates replace the static text with details from the license/permit application.

Before you begin

Role required: sn_gsm.constituent_agent, sn_gsm.business_agent, sn_gsm.agency_agent, sn_gsm.relationship_agent, or sn_gsm.service_manager, sn_gsm.case_task_agent

About this task

Selecting the response templates icon  shows the reusable messages that you can copy and paste into cases and case tasks.

In License and Permit Playbook,Response Templates replace the static text with details from the license/permit application, such as:

- Constituent or Business Contact Name
- License/permit application Number
- License/permit application submission date
- Short description
- Address Information
- Assigned to

For information on how to create response templates, see Create or modify a response template.

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Procedure

1. In the CRM Workspace, open an information request task.
2. In the contextual side panel, select the response templates icon to display a list of the available templates.
3. In the Response Templates side panel, search for a template.
4. Select a template and then select **Copy** to copy the template to the clipboard.
   Paste the template text into the **Work notes** field or the **Additional comments** field.

Using the activity stream in License and Permit Playbook

You can access the activity stream in the contextual side panel in CRM Workspace after you create an license and permit request record using the License and Permit Playbook. The activity stream enables you to communicate with requesters and make internal notes about the work that is done on a record, making it easier to relay and track information.

Using the activity stream

You can use an activity stream to communicate with requesters and track information on a record. The activity stream updates when the current activity in the playbook is updated.

You can access the activity stream by selecting the activity stream icon ( ) in the contextual side panel.

Agent tasks in the activity stream

The following table lists the tasks that you can do in the activity stream.

Agent tasks

Task	Description
View posts for the case or case task	Current activity in the playbook work area that determines the information that is displayed in the activity stream. Scroll through the posts in the Activity section to view the case or task information. At the top of the activity stream, select **Case** or **Task** to switch views.
Add work notes or comments	In the Compose section: 1. Select the **Work notes** or **Comments** activity. 2. Add the information to the text field. 3. Select **Post Work Notes** or **Post Comments**. The post is added to the Activity section. Internal work notes are private and are only visible to other agents. External comments are visible to agents and requesters.

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Agent tasks (continued)

Task	Description
Filter or search posts	At the top of the Activity section, select the filter icon ( ) to display the filter selections: • **Post types:** Select the types of posts to view, such as the work notes or attachments. • **Field changes:** Select the fields that you want to view the posts for in only those fields. • **Flagged:** Enable this button to view the posts that have been flagged as important. • **Filter sets**: Select two or more filters in this list. Search all activity posts by selecting the search icon ( ).
Sort posts	Sort the posts by the newest to the oldest or the oldest to the newest posts by selecting the sort icon ( )
Expand and collapse posts	Expand and collapse posts by selecting the more options icon (•••): • **Expand all posts**: Expands the posts to view additional details. • **Collapse all posts**: Returns the posts to their previous state.

Viewing the dynamic related records in License and Permit Playbook

You can view the dynamic related records in the playbook contextual side panel in CRM Workspace. These records dynamically change based on the current record or playbook activity.

Using related records in License and Permit Playbook

You can view, search, and sort the records in the **Related Records** tab in the contextual side panel after you create an license and permit request record.

The **Related Records** tab displays the related records that dynamically change based on the context of the current record or playbook activity. The records that are displayed in the **Related Records** tab depend on the following settings:

- The related record contexts and definitions that have been configured for a record or playbook activity.
- The agent's access permissions to data.

Different related records appear based on each playbook stage and step. At the Intake and Review stages, the agent should see similar Closed License/Permit Requests, so they can

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compare the outcome of similar requests. At the Process and Decision stages, agents should see any Open Case Tasks that are preventing the case from moving to the next step, or being resolved and closed.

Types of related records

The related records appear in the list as a read-only card. The initial set of records that display in the list is determined by the record type that you select in the filter at the top of the list. Depending on the related record configuration for the source record or playbook activity, you can see the following types of related records:

- SLAs
- Escalations
- Blocked By
- Open Case Tasks
- Similar License/Permit Requests
- Emails
- Draft Emails
- Documents
- Approvals
- Knowledge Gaps
- Install Base
- Attached Knowledge
- Requests
- Interactions
- Related Cases
- Special Handling Notes
- Appointments
- Related Parties

Customizing the related records view

The following table lists the customization options for the related records view.

Customizing the Related records view

Task	Description
View the related records in the contextual side panel	Related Records icon ( ) that you can select to view the Related Records list. Related records appear as a card format in the list. The initial set of records that display in the list is determined by the record type that you select in the filter at the top of the list.
Select the type of related record to view	Filter at the top of the Related Records list where you can select the type of related records to view. You can

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Customizing the Related records view (continued)

Task	Description
	also use the filter to see the current selection. For more information, see Customize the related records view in Service Request Playbook.
Search the related records list	Search field at the top of the Related Records list to perform a text search. Records that match the search text are highlighted. For more information, see Customize the related records view in Service Request Playbook.
Open a related record in a subtab	Card in the Related Records list that you can use to open the record in a subtab under the parent record. In the subtab, you can view the record details and perform the available actions.
Open the related record list in a list view in a subtab	List view icon ( ) to display the related records in a list view in a subtab under the parent record.
Create a new record for the selected related list	New record for the record type that is currently selected in the Related Records list. This action opens a new record form in a subtab under the parent record.

Viewing the ribbon information in License and Permit Playbook

You can view the information about the ribbon in the contextual side panel in CRM Workspace. The ribbon displays the important information about the case, such as the information request record information, constituent contact details, and the case timeline.

Select the record information icon ( ) in the contextual side panel to view the information about the ribbon.

You can see the information about the fields in the contextual side panel in the following table.

Contextual Side Panel Ribbon fields

Field	Definition
Record Information	Case record number, short description, stage, state.
Requester Overview Card	Details about the constituent and contact for the case.
Timeline	Chronological summary of the case activities, including the case state changes and interactions between the agent and the constituent/business. You can also see how much time that the agent and user spent on the case.
SLAs	Active service level agreements (SLAs) for the case, including the time remaining, the SLA state, and any breaches.

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Add Multiple Parties to a record in License and Permit Playbook

As a government agent, you can add other business contacts or constituents to a license or permit application.

Before you begin

Role required: sn_gsm.constituent_agent, sn_gsm.relationship_agent, sn_gsm.government_service_manager, sn_gsm.business_agent, sn_gsm.agency_constituent_agent, sn_gsm.agency_manager, sn_gsm.agency_agent

Procedure

1. Open the License and Permit Playbook by navigating to Lists in the CRM Workspace.
2. Navigate to the **License and Permit Requests** list and select **All**.
3. Open the License or Permit Request case you wish to add multiple related parties to.

   Note: Related parties can only be edited if the case is in the **Intake** or **Review** stage.

4. Navigate to the **Add related parties** activity in the Intake stage of License and Permit Playbook.
5. Select **Add Related Party**.
6. Select the Type and Responsibility of the related party in the dropdown, then enter their contact name in the Contact field to look up existing contacts that match this name.

   Note: All license/permit co-applicants must have a business contact account to be included on a license/permit application. Each contact can create an account by registering on the Government Service Portal, or a government service agent can create a business contact record for them. For information on how agents can create a business contact record from information entered in a License and Permit application, see Create a business contact account from license or permit application data.

7. Select **Save**.
8. Repeat steps 5-7 to add as many related parties as needed.
9. Select **Mark as Complete**.

Create a business contact account from license or permit application data

Use the contact information for related parties entered on a license or permit application to create business contact accounts.

Before you begin

Role required: sn_gsm.constituent_agent, sn_gsm.relationship_agent, sn_gsm.government_service_manager, sn_gsm.business_agent, sn_gsm.agency_constituent_agent, sn_gsm.agency_manager, sn_gsm.agency_agent

Procedure

1. Navigate to the CRM Workspace and select **Interactions** > **All**.
2. Select the interaction number to open an existing interaction record, or select the new icon New to create an interaction.
3. Select the interaction type and assign the interaction to a user.
4. **Optional:** Enter a short description of the interaction.
5. Select **Save**.

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6. Select **Create Business** and fill in the fields.
7. Select **Submit**.

Manage a business contact or related party from an Application

Additional business contacts can be edited or removed by a government service agent before a license or permit case reaches the Process stage.

Before you begin

Role required: sn_gsm.constituent_agent, sn_gsm.relationship_agent, sn_gsm.government_service_manager, sn_gsm.business_agent, sn_gsm.agency_constituent_agent, sn_gsm.agency_manager, sn_gsm.agency_agent

Procedure

1. Open the License and Permit Playbook by navigating to Lists in the CRM Workspace.
2. Navigate to the **License and Permit Requests** list and select **All**.
3. Open the License or Permit Request case that you want to remove a business contact from.

   Note: Related parties can only be edited if the case is in the **Intake** or **Review** stage.

4. Navigate to the **Add related parties** activity in the Intake stage of License and Permit Playbook.
5. Select the delete icon next to the business contact you want to delete, or the edit icon next to the business contact you want to edit.
6. Select **Save** once you're finished editing the related party information.
7. Select **Mark Complete** to save the activity.

Using Information Request Administration

If you're an information request case agent or manager, you can use the Information Request Administration for Public Sector Digital Services to manage and resolve requests for information and public records.

A playbook provides you with step-by-step guidance through the life cycle of an information request case.

The Information Request Administration automatically appears in the **Playbook** tab when you create an information request case by using the CRM Workspace.
A playbook takes a workflow and breaks it into multiple stages or lanes. Each stage in a playbook includes one or more activities, or steps, for you to complete. Stages can also include automated activities, such as auto-sending an email to a customer when a stage or activity is complete.
When using a playbook, you can:

- View the playbook stages and activities.
- Select an activity and perform the work to complete that activity.
- Mark an activity as complete and move to the next activity or stage.
- Complete the stages and activities to resolve the case.

The workflows for a type of case and the activities that you need to resolve these cases are in the playbook. By using a playbook, you can visualize the entire life cycle of the information request workflow.

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Playbook stages

The Information Request Administration stages are listed in the following table.

Playbook stages

Task	Description
Intake	Guides you through the record creation process by capturing the details of the information request and assigning it to the right agent.
Review	Acts as a checkpoint for duplicate cases and provides you with an opportunity to review the case details to verify that the issue is valid and needs to be resolved.
Process	Guides you through the activities for the information request fulfillment.
Decision	Captures and communicates the documents and information to the constituent and any other agents or involved parties.

Playbook layout

A playbook is made up of several areas, including the playbook life cycle, the playbook work area, and the contextual side panel. The activity view determines how the stages and activities appear in the playbook.

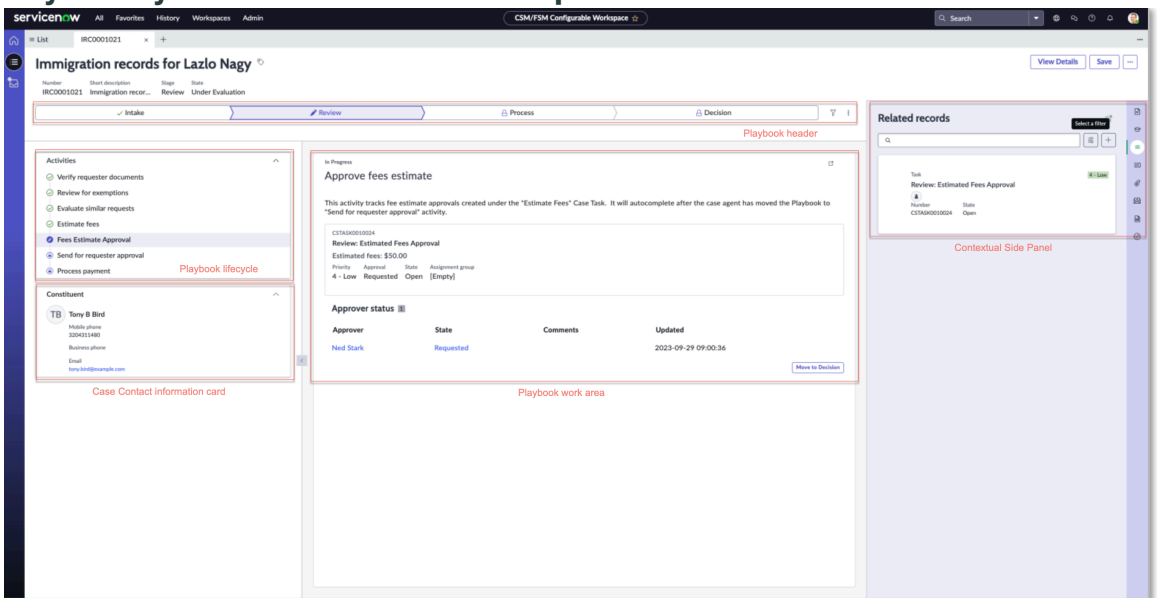
The default activity view for the Information Request Administration is the Process-based experience view. This view, which is shown in the following example, shows constituent or business information and case task information at the forefront of the playbook work area as you work on it.

The process-based playbook layout shows the following features:

- A horizontal stage picker that gives the agent a complete view of the entire process and where they currently are in that process. Agents can use the stage picker to track their overall progress as they work on cases.
- Record information on the left side of the page, such as the contact information that is always available.
- Related records in the contextual side panel supported by the dynamic related records component.

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Playbook layout with the Process-based experience view



The following table shows the components that you can see in the Information Request Playbook workspace.

Playbook components

Playbook area	Description
Playbook header	• Appears at the top of the playbook. • Shows the title of the playbook and a horizontal stage picker that displays progress through the playbook stages. • Includes a filter that you can use to filter the activities by the assigned user or the activity status. • Includes the Playbook Actions menu that you can use to select the playbook-level and activity-level actions.
Playbook Lifecycle	• Appears in a panel on the left side of the playbook. • Displays a list of the activities for each stage. • With the horizontal stage layout, you can expand or collapse the entire list of activities for the current stage.
Playbook work area	• Appears in the middle of the playbook. • Displays the card for the current activity.
Contextual side panel	• Appears on the right side of the playbook. • Includes the tabs that you can use to display the following types of information:

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Playbook components (continued)

Playbook area	Description
	○ Case or case task activity stream. ○ Ribbon information such as the case overview, customer details, timeline, and service level agreements (SLAs). ○ Dynamic related records. For more information, see Dynamic related records.
Constituent or Business Card	• Contact information for the constituent or business that submitted the request. • Appears in a panel on the left side of the playbook.

Create an information request record using Information Request Administration

Create an information request record in the Public Sector Digital Services application by using an Information Request Administration activity. By using a playbook, you can have an efficient, streamlined way to create and resolve an information request.

Before you begin

Note: Before you start this procedure, verify that the Information Request Administration application, which is separate from Public Sector Digital Services Core, is installed and enabled in the CRM Workspace. For instructions, see Install Information Request Administration for Public Sector Digital Services.

Role required: sn_gsm.constituent_agent, sn_gsm.business_agent, sn_gsm.agency_agent, sn_gsm.relationship_agent, and sn_gsm.service_manager

About this task

If a playbook is configured to use a record generator, you can create a record by using a playbook activity. If a case is already associated with a playbook, a new information request case type is opened in a new tab, with Playbook as the default tab. Creating a record from a list or form, or from an activity in another playbook, opens the Information Request Administration and initiates the first activity. This activity, the first step of the Intake stage, guides you through the record creation process.

Procedure

1. In the CRM Workspace, navigate to **Lists** > **Information Requests** > **All**.
2. Select **New**.
   The Information Request Administration opens and initiates the first activity for collecting the request details, which is the Intake stage.
3. On the Enter Request Details activity card, fill in the information.
4. Select **Save**.
   A case is created with the information request information. The case number is added to the tab and the first activity in the Intake stage is marked as complete. The second activity in this stage is highlighted as the current activity.

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Using the contextual side panel in Information Request Administration

The contextual side panel provides you with the tools that can help you to research and resolve problems about your cases.

The contextual side panel in the CRM Workspace gives you access to information that can help you resolve information request cases.

It includes a column of icons that you can select to access different types of information.

The following table shows you the tabs that you should see on the contextual side panel in the Information Request Administration.

Contextual side panel tabs

Field	Description
Record information icon 	Relevant information about a record. In Service Request Playbook, the ribbon displays the record information, constituent details, the case timeline, and the active and inactive service level agreements (SLAs). For more information on how to view information about the ribbon in playbooks, see Viewing the ribbon information in Information Request Administration.
Agent assist icon ()	List of search results with the content that is related to the record that you are viewing. The content may include knowledge articles, recommended actions, or other records. For more information, see Agent assist Overview.
Attachments icon ()	Ability for you to attach knowledge base content to a response to the requester in the activity stream.
Template icon ()	Standard content that is related to resolving the issue. To create a template, select the template icon  .
Response template icon ()	Reusable messages that you can copy and paste into the cases and case tasks. For more information on using and creating response templates, see Use response templates in Information Request Administration.
Dynamic Related Records icon ()	Related records in the contextual side panel that dynamically change based on the context of the current record or playbook activity.
Activity stream icon	Ability for you to communicate with requesters and make internal notes about the work that is done on a record.

Use response templates in Information Request Administration

Respond to cases by using the response templates in the contextual side panel in CRM Workspace. Good templates save you time by eliminating repetitive work.

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Before you begin

Role required: sn_gsm.constituent_agent, sn_gsm.business_agent, sn_gsm.agency_agent, sn_gsm.relationship_agent, or sn_gsm.service_manager

About this task

Selecting the response templates icon shows the reusable messages that you can copy and paste into cases and case tasks. For information on how to create response templates, see Create or modify a response template.

Procedure

1. In the CRM Workspace, open an information request task.
2. In the contextual side panel, select the response templates icon to display a list of the available templates.
3. In the Response Templates side panel, search for a template.
4. Select a template and then select **Copy** to copy the template to the clipboard.
   Paste the template text into the **Work notes** field or the **Additional comments** field.

Using the activity stream in Information Request Administration

You can access the activity stream in the contextual side panel in CRM Workspace after you create an information request record using the Information Request Administration. The activity stream enables you to communicate with requesters and make internal notes about the work that is done on a record, making it easier to relay and track information.

Using the activity stream

You can use an activity stream to communicate with requesters and track information on a record. The activity stream updates when the current activity in the playbook is updated.

You can access the activity stream by selecting the activity stream icon ( ) in the contextual side panel.

Agent tasks in the activity stream

The following table lists the tasks that you can do in the activity stream.

Agent tasks

Task	Description
View posts for the case or case task	Current activity in the playbook work area that determines the information that is displayed in the activity stream. Scroll through the posts in the Activity section to view the case or task information. At the top of the activity stream, select **Case** or **Task** to switch views.
Add work notes or comments	In the Compose section:

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Agent tasks (continued)

Task	Description
	1. Select the **Work notes** or **Comments** activity. 2. Add the information to the text field. 3. Select **Post Work Notes** or **Post Comments**. The post is added to the Activity section. Internal work notes are private and are only visible to other agents. External comments are visible to agents and requesters.
Filter or search posts	At the top of the Activity section, select the filter icon ( ) to display the filter selections: • **Post types:** Select the types of posts to view, such as the work notes or attachments. • **Field changes:** Select the fields that you want to view the posts for in only those fields. • **Flagged:** Enable this button to view the posts that have been flagged as important. • **Filter sets**: Select two or more filters in this list. Search all activity posts by selecting the search icon ( ).
Sort posts	Sort the posts by the newest to the oldest or the oldest to the newest posts by selecting the sort icon ( )
Expand and collapse posts	Expand and collapse posts by selecting the more options icon (•••): • **Expand all posts**: Expands the posts to view additional details. • **Collapse all posts**: Returns the posts to their previous state.

Viewing the dynamic related records in Information Request Administration

You can view the dynamic related records in the playbook contextual side panel in CRM Workspace. These records dynamically change based on the current record or playbook activity.

Using related records in Information Request Administration

You can view, search, and sort the records in the **Related Records** tab in the contextual side panel after you create an information request record.

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The **Related Records** tab displays the related records that dynamically change based on the context of the current record or playbook activity. The records that are displayed in the **Related Records** tab depend on the following settings:

- The related record contexts and definitions that have been configured for a record or playbook activity.
- The agent's access permissions to data.

Types of related records

The related records appear in the list as a read-only card. The initial set of records that display in the list is determined by the record type that you select in the filter at the top of the list. Depending on the related record configuration for the source record or playbook activity, you can see the following types of related records:

- Similar Information Requests
- Open Case Tasks
- Related Work Orders
- Blocked Tasks
- Emails
- Approvals
- SLAs
- Escalations for the case

Customizing the related records view

The following table lists the customization options for the related records view.

Customizing the Related records view

Task	Description
View the related records in the contextual side panel	Related Records icon ( ) that you can select to view the Related Records list. Related records appear as a card format in the list. The initial set of records that display in the list is determined by the record type that you select in the filter at the top of the list.
Select the type of related record to view	Filter at the top of the Related Records list where you can select the type of related records to view. You can also use the filter to see the current selection. For more information, see Customize the related records view in Service Request Playbook.
Search the related records list	Search field at the top of the Related Records list to perform a text search. Records that match the search text are highlighted. For more information, see

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Customizing the Related records view (continued)

Task	Description
	Customize the related records view in Service Request Playbook.
Open a related record in a subtab	Card in the Related Records list that you can use to open the record in a subtab under the parent record. In the subtab, you can view the record details and perform the available actions.
Open the related record list in a list view in a subtab	List view icon ( ) to display the related records in a list view in a subtab under the parent record.
Create a new record for the selected related list	New record for the record type that is currently selected in the Related Records list. This action opens a new record form in a subtab under the parent record.

Viewing the ribbon information in Information Request Administration

You can view the information about the ribbon in the contextual side panel in CRM Workspace. The ribbon displays the important information about the case, such as the information request record information, constituent contact details, and the case timeline.

Select the record information icon ( ) in the contextual side panel to view the information about the ribbon.

You can see the information about the fields in the contextual side panel in the following table.

Contextual Side Panel Ribbon fields

Field	Definition
Record Information	Fields, case record number, short description, stage, state, and address.
Requester Overview Card	Details about the constituent and contact for the case.
Timeline	Chronological summary of the case activities, including the case state changes and interactions between the agent and the customer. You can also see how much time that the agent and customer spent on the case.
SLAs	Active service level agreements (SLAs) for the case, including the time remaining, the SLA state, and any breaches.

Track information requests using the Information Request Administration

Track all the information requests that are assigned to you or other agents in your government agency by using the Information Request Administration.

Before you begin

Role required: sn_gsm.constituent_agent, sn_gsm.business_agent, sn_gsm.agency_agent, sn_gsm.relationship_agent, and sn_gsm.service_manager

About this task

When you select a case, a form opens with the following sections:

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- A conversation of the interaction between the requester and the information request case agent.
- The action that needs to be taken on the user's part, such as accepting or rejecting a case outcome.
- The case details, including the case number and status.
- Any attached files.

Procedure

1. Open the Information Request Administration by navigating to Lists in the CRM Workspace.
2. Navigate to the **Information Requests** list and select **All**.
3. In the Information Requests section, select a list that is described in the following table.

Information Request Lists

List	Description
All	All information request cases that the agent has access to.
My Cases	All information request cases assigned to the agent.
My Open	Open cases assigned to the information request case agent.
Unassigned for my group	Cases that belong to any of the information request case agent's groups but haven't been assigned to an agent.

For a detailed description of the fields under each list, see Information Request case form.

Resolving an information request case using the Information Request Administration

You can use playbooks to create cases and to complete the tasks and activities that are needed to resolve specific types of cases.

Note: Verify that the Information Request Administration application, which is separate from the Public Sector Digital Services Core application, has been installed and configured. For instructions, see Install and configure the Information Request Administration application.

By default, the following stages are available to you as an information request case agent in the Information Request Administration in the CRM Workspace.

- Intake
- Review
- Processing
- Decision

Stages in an Information Request Playbook

The Information Request Administration experience starts with the Intake stage. This stage is the default playbook stage for a new information request case. Use this playbook stage to gather information about the requester, the documents being requested, and any exemption categories that the request falls into. You can also request additional information from the requester.

The playbook continues with the Review stage. In this stage, you can do the initial troubleshooting on the case, evaluate similar or duplicate requests, and determine whether the information requested can be released and if a fee needs to be charged. You can move the

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case to the next stage when the requester accepts the fee, or if a fee waiver is submitted and approved.

The playbook continues with the Process stage. In this stage, you can assess resources, request a fee approval, create case tasks, and add or request new information before the case resolution begins. The case status changes to Work in Progress once the fee payment is processed or waived. The case is then sent for legal review. After legal review is complete, the case is moved to the Decision stage. You may solicit additional information from the requester at any time during this stage.

The final stage of the Information Request Administration is the Decision stage. At the Decision stage, the status of the case is updated from Review in Progress to Ready for Decision after the case has passed legal review. A notification is sent to the requester that lets them know that case approval has been has obtained and the requested documents have been uploaded. The requester can then either accept or reject the document. If the requester accepts the documents, the case is automatically closed. If the requester rejects the solution, the case is reopened, and the agent must propose another outcome.

Complete the Intake stage in Information Request Administration

Complete the Intake stage as your first step in resolving a case using the Information Request Administration.

Before you begin

Role required: sn_gsm.constituent_agent, sn_gsm.relationship_agent, sn_gsm.government_service_manager, sn_gsm.business_agent, sn_gsm.agency_constituent_agent, sn_gsm.agency_manager, sn_gsm.agency_agent

Procedure

1. In the CRM Workspace, navigate to **Lists** > **Information Requests** > **All**.
2. Select **New**.
   The Information Request Administration opens and initiates the first activity for collecting the request details.
3. On the Enter Request Details activity card, fill in the information.
4. Select **Save**.
   A case is created with the information request information. The case number is added to the tab and the first activity in the Intake stage is marked as complete. The second activity in this stage is highlighted as the current activity. If you have enabled the Similar Request documents UI activity, this will display as the second activity. For more information, see Configure Similar Request Documents UI in Information Request Administration.
5. **Optional:** Select a related document to link it to the request, and select **Next**.
6. Review the details of the case and make updates if needed.
7. Select **Submit**.
8. Select **Assign to me**.
9. Select **Move to review**.
   The Intake stage is now complete and the case is moved to the Review stage.

Complete the Review stage in Information Request Administration

Complete the Review stage as your second step in resolving a case using the Information Request Administration.

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Before you begin

Role required: sn_gsm.constituent_agent, sn_gsm.relationship_agent, sn_gsm.government_service_manager, sn_gsm.business_agent, sn_gsm.agency_constituent_agent, sn_gsm.agency_manager, sn_gsm.agency_agent

Procedure

1. Review the files attached to the case, and confirm that the requester has included the required documents to validate their identity by selecting the boxes associated with the document type.
2. Select **Mark as Complete**.
3. Select any exemptions that apply to the case, and select **Mark as Complete**.
   If no exemptions apply to the case, select **No exemption code(s) applicable**.
4. Do one of the following actions depending on whether you have similar or linked completed requests.

Options	Steps
If there are no similar or linked completed requests	Select **Mark as Complete**.
If there are similar or linked completed requests	Review them to see if any are relevant to the current request.

5. Estimate the fees associated with this request by using the fee estimator.
   The fee estimator can only be run once.
6. Enter details on the fee estimate in the work notes, then select **Request Fee Approval**.
   If the requester qualifies for a fee waiver, enter that information here. The fee estimate is now sent to billing to be approved. Once the fee estimate has been approved, mark the step as complete.
7. Select **Send for Requester Approval** to send the fee estimate to the requester.

   This activity will automatically be marked complete once the requester has approved the fee, and the case will be moved to the Process Payment activity.
8. Verify the payment has been sent, and select **Move to Process**.
   The Review stage is now complete and the case is moved to the Process stage.

Complete the Process stage in Information Request Administration

Complete the Process stage as your third step in resolving a case using the Information Request Administration.

Before you begin

Role required: sn_gsm.constituent_agent, sn_gsm.relationship_agent, sn_gsm.government_service_manager, sn_gsm.business_agent, sn_gsm.agency_constituent_agent, sn_gsm.agency_manager, sn_gsm.agency_agent

Procedure

1. Upload the documents needed to fill this request by selecting **New Document** or **Link Document**.
2. Move to the next activity by selecting **Prepare for Review**.
3. Enter any additional work notes or details needed for legal review, and then select **Send for Legal Review**.

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A case task is now created and assigned to the Legal Review assignment group for approval. If the uploaded documents are rejected during the legal review, you may need to make changes and request a review again or move the case directly to the Decision stage.

4. After the legal review is complete, select **Mark as Complete**.
   The case is moved to the Final Review Pre-release activity, where the documents and details of the request are reviewed by the Final Review Team assignment group.
5. After the documents have been approved by the Final Review Team, select **Move to Decision**.
   The Process stage is complete and the case is moved to the Decision stage.

Complete the Decision stage in Information Request Administration

Complete the Decision stage as your last step in resolving a case using the Information Request Administration.

Before you begin

Role required: sn_gsm.constituent_agent, sn_gsm.relationship_agent, sn_gsm.government_service_manager, sn_gsm.business_agent, sn_gsm.agency_constituent_agent, sn_gsm.agency_manager, sn_gsm.agency_agent

Procedure

1. Enter any work notes for the customer or other users on the case watch-list, and then select **Release** to release the information to the requester.
2. **Optional:** If the requester has opted to be notified by mail, in the work notes, verify that the notice has been sent by mail and select **Mark as Complete**.
3. **Optional:** If the requester has opted to be notified by phone, in the work notes, verify that the notice has been sent by phone and select **Mark as Complete**.
4. Review the resolution code and resolution notes, and select **Propose solution**.
   All case tasks must be closed before an agent can propose a solution to the case.
   A notification is sent to the constituent that lets them know that the request is completed. The constituent can either accept or reject the proposal. If the constituent accepts the proposal, the case is automatically closed. If the constituent rejects the solution, the case is reopened, and the agent must propose another outcome.

Redact sensitive data from a document in Information Request Administration

As a legal reviewer, you can redact sensitive data from PDF documents by either searching keywords or selecting text in Information Request Administration.

About this task

Agents can:

- Redact manually by selecting text to be highlighted for redaction.
- Redact via keyword using Search and Redact.

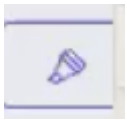
Before you begin

Role required: sn_gsm.constituent_agent, sn_gsm.business_agent, sn_gsm.agency_agent, sn_gsm.relationship_agent, and sn_gsm.service_manager

Procedure

1. Open the Information Request Administration by navigating to Lists in the CRM Workspace.
2. Navigate to the **Information Requests** list and select **All**.
3. Select the case that contains the PDF you wish to redact information from.
4. Navigate to the **Legal Review** activity in the **Process** stage.

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5. Under the Related Documents card, select the PDF you wish to redact information from.
6. Select the Redact PDF  icon.
7. To redact using the highlight functionality: select Highlight.
8. Drag the cursor to form a box over the text you wish to redact.
   A green box will display over the selected text.
9. Select **Apply Redactions** to redact the highlighted text.
10. Confirm your selection when prompted.
11. To redact using the Search and Redact functionality: enter a keyword you wish to redact, and select Search to parse the document for this keyword.
12. Select **Apply Redactions** to redact every instance of this keyword.
13. Confirm your selection when prompted.
14. Repeat steps 13-14 to redact multiple keywords.
15. Select **Save Changes** to save the redacted version of the PDF.
    Previous versions of the document (which may contain different redacted text) are available and can be accessed by a government employee.

Result
The information is now permanently redacted from the PDF.

Add Multiple Parties to a record in Information Request Administration

As a government agent, you can add other business contacts or constituents to an information request application.

Before you begin
Role required: admin

Procedure
1. Open the Information Request Administration by navigating to Lists in the CRM Workspace.
2. Navigate to the **Information Requests** list and select **All**.
3. Open the Information Request case you wish to add multiple related parties to.

   Note: Related parties can only be edited if the case is in the **Intake** or **Review** stage.

4. Navigate to the **Add related parties** activity in the Intake stage of Information Request Administration.
5. Select **Add Related Party**.
6. Select the Type and Responsibility of the related party in the dropdown, then enter their contact name in the Contact field to look up existing contacts that match this name.

   Note: All information request co-applicants must be registered on the Government Service Portal to be included on a information request application. Each co-applicant can create an account by registering on the Government Service Portal, or a government service agent can create a business contact account for them. For information on how agents can create a business contact record from information entered in an Information Request application, see Create a business record in CRM Workspace.

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7. Select **Save**.
8. Repeat steps 5-7 to add as many related parties as needed.
9. Select **Mark as Complete**.

Using Service Request Playbooks

If you're a government service agent or manager, you can use the Service Request Playbook for Public Sector Digital Services to manage and resolve requests for services like park maintenance, broken stop signs, or other types of community issues.

A playbook provides a step-by-step guidance through the life cycle of a government service case.

The Service Request Playbook automatically appears in the **Playbook** tab when you open or create a service request case in the CRM Workspace.
A playbook takes a workflow and breaks it into multiple stages or lanes. Each stage in a playbook includes one or more activities, or steps, for you to complete. Stages can also include automated activities, such as auto-sending an email to a constituent when a stage or activity is complete, or auto-sending a work order to a field service agent. When using a playbook, you can:

- View the playbook stages and activities.
- Select an activity and perform the work to complete that activity.
- Mark an activity as complete and move to the next activity or stage.
- Complete the stages and activities to resolve the case.

The workflows that are associated with a specific type of case and the activities that need to be completed to resolve this type of case are detailed in the playbook. Playbooks also help you to visualize the entire lifecycle of the service request workflows by displaying your progress through the playbook in the header.

Playbook stages

The Service Request Playbook has four stages, listed in the following table.

Playbook stages

Task	Description
Intake	Guides you through the record creation process by capturing the details of the service request and assigning it to the right agent.
Review	Acts as a checkpoint for duplicate cases and provides you with an opportunity to review the case details to verify that the issue is valid and needs to be resolved.
Process	Guides you through the activities for case resolution.
Decision	Captures and communicates the decision that you made on the service request to the constituent and any other agents or involved parties.

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Playbook layout

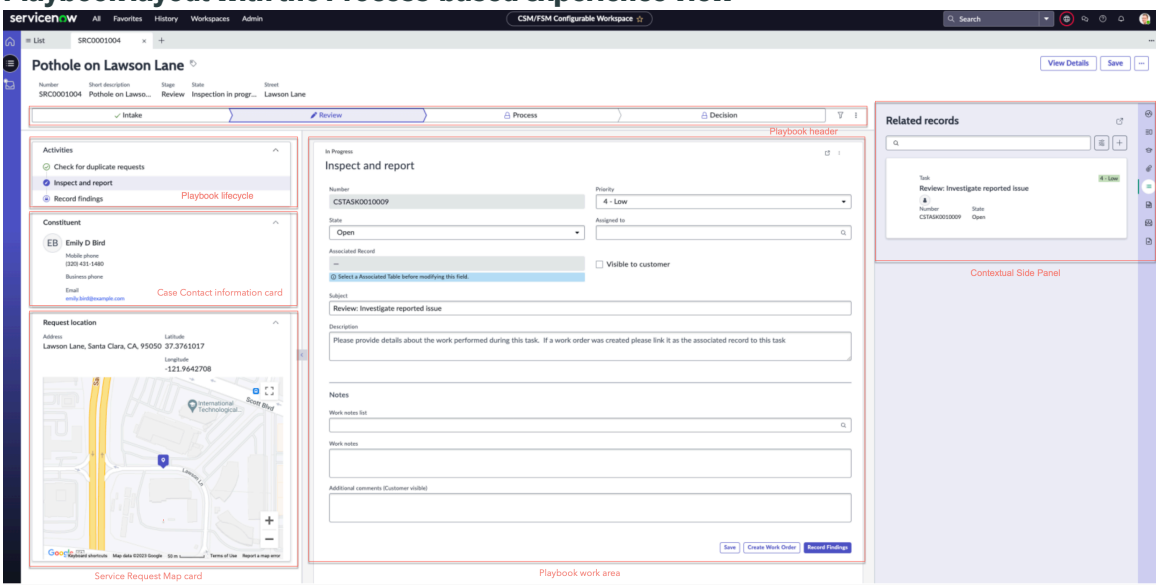
A playbook is made up of several areas, including the playbook life cycle, the playbook work area, and the contextual side panel. The activity view determines how the stages and activities appear in the playbook.

The default activity view for the Service Request Playbook is the Process-based experience view. This view, which is shown in the following example, shows constituent or business information and case task information at the forefront of the playbook work area as you work on it.

The process-based playbook layout shows the following features:

- A horizontal stage picker that gives the agent a complete view of the entire process and where they currently are in that process. Agents can use the stage picker to track their overall progress as they work on cases.
- Record information on the left side of the page, such as the contact information that is always available.
- Related records in the contextual side panel supported by the dynamic related records component.

Playbook layout with the Process-based experience view



The following table shows the components that you can see in the Service Request Playbook process-based workspace.

Playbook components

Playbook area	Description
Playbook header	• Appears at the top of the playbook. • Shows the title of the playbook and a horizontal stage picker that displays progress through the playbook stages.

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Playbook components (continued)

Playbook area	Description
	• Includes a filter that you can use to filter the activities by the assigned user or the activity status. • Includes the Playbook Actions menu that you can use to select the playbook-level and activity-level actions.
Playbook Lifecycle	• Appears in a panel on the left side of the playbook. • Displays a list of the activities for each stage. • With the horizontal stage layout, you can expand or collapse the entire list of activities for the current stage.
Playbook work area	• Appears in the middle of the playbook. • Displays the card for the current activity.
Contextual side panel	• Appears on the right side of the playbook. • Includes the tabs that you can use to display the following types of information: ○ Case or case task activity stream. ○ Ribbon information such as the case overview, customer details, timeline, and service level agreements (SLAs). ○ Dynamic related records. For more information, see Dynamic related records.
Constituent or Business Card	• Contact information for the constituent or business that submitted the request. • Appears in a panel on the left side of the playbook.
Service Request Map Card	• New component of the process-based playbook layout. • Appears after the intake stage, if the sn-geo-map plugin is installed, and Google API key is configured.

Create a service request record using Service Request Playbook

Create a service request record in the Public Sector Digital Services application by using a Service Request Playbook activity. By using a playbook, you can have an efficient, streamlined way to create and resolve a service request.

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Before you begin

Note: Before starting this procedure, verify that the Service Request Playbook application, which is separate from Public Sector Digital Services Core, has been installed and enabled in the CRM Workspace. For instructions, see Install Service Request Playbook for Public Sector Digital Services.

Role required: sn_gsm.constituent_agent, sn_gsm.business_agent, sn_gsm.agency_agent, sn_gsm.relationship_agent, and sn_gsm.service_manager

About this task

If a playbook is configured to use the record generator feature, you can create a record using a playbook activity. If a case is already associated with a playbook, a new service request case type is opened in a new tab, with Playbook as the default tab. Creating a record from a list or form, or from an activity in another playbook, opens the Service Request playbook and initiates the first activity. This activity, the first step of the intake stage, guides you through the record creation process.

Procedure

1. In the CRM Workspace, navigate to **Lists** > **Service Requests** > **All**.
2. Select **New**.
   The Service Request Playbook opens and initiates the first activity for collecting the request details, which is the Intake stage.
3. On each activity card, fill in the information.
   Select Skip to bypass an intake activity.
4. Select **Save**.
   A case is created with the service request information. The case number is added to the tab and the first activity in the Intake stage is marked as complete. The second activity in this stage is highlighted as the current activity.

What to do next

Continue using the playbook stages and activities to resolve the constituent's issue and complete the case.

Resolving a service request case by using playbooks in Public Sector Digital Services

You can use playbooks to create cases and to complete the tasks and activities that are needed to resolve specific types of cases.

Note: Verify that the Service Request Playbook application, which is separate from the Public Sector Digital Services Core application, has been installed and configured. For instructions, see Install and configure the Service Request Playbook application.

By default, the following stages are available to you as a government service agent in the Service Request Playbook in the CRM Workspace.

- Intake
- Review
- Processing
- Decision

Stages in a Service Request Playbook

The Service Request Playbook experience starts with the Intake stage. This stage is the default playbook stage for a new service request case. Use this playbook stage to gather information

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about the requester and the complaint for the service request case. You can also request additional information from the requester.

The playbook continues with the Review stage. In this stage, you can do the initial troubleshooting on the case, check for similar or duplicate case requests, and determine what services need to be rendered and if a field service agent needs to be dispatched. For more information on the Public Sector Digital Services integration with Field Service Management, see Integration with Field Service Management.

The playbook continues with the Process stage. In this stage, you can assess resources, request resource approval, create case tasks, and add or request new information before case resolution begins. If a field service agent needs to be dispatched to the service request location, you can create a work order during the process stage. The case status changes to Work in Progress after the field service agent begins work on the service request case. After work has been completed, the case is moved to the Decision stage.

The final stage of the Service Request Playbook is the Decision stage. At the Decision stage, the state of the case is updated from Work in Progress to Ready for Decision after an agent sends in a decision. A notification is sent to the requester that lets them know that a decision has been reached. The requester can then either accept or reject the solution. If the requester accepts the solution, the case is automatically closed. If the requester rejects the solution, the case is reopened, and the agent must propose another solution.

Complete the Intake Stage in Service Request Playbook

Complete the intake stage as your first step in resolving a case using the Service Request Playbook.

Before you begin

Role required: admin, sn_gsm.constituent_agent, sn_gsm.business_agent, sn_gsm.agency_agent, sn_gsm.relationship_agent, and sn_gsm.service_manager

Procedure

1. In the CRM Workspace, navigate to **Lists** > **Service Request case list** > **All**.
2. Select **New**.
   The Service Request playbook opens and initiates the first activity for collecting the request details
3. On the Enter Request Details activity card, fill in the information.
4. Select **Save**.
   A case is created with the service request information. The case number is added to the tab and the first activity in the Intake stage is marked as complete. The second activity in this stage is highlighted as the current activity. If you have enabled the Similar Records UI activity, this will display as the second activity. For more information, see Configure the Similar Records Activity UI in Service Request Playbook.
5. Review the similar records that are displayed in the Similar Records Activity UI, and determine whether any of them are a duplicate of the current case.
   - If the current case is a duplicate of any of the cases displayed in the Similar Records UI, select **Mark as Primary Case**, then select **Move to Decision**.
   - If the current case is not a duplicate of any of the cases displayed in the Similar Records UI, select **Existing Case Check Done** to move to the next activity.
6. Review the details of the case and make updates if needed.
7. Select **Submit**.

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8. Select **Move to review**.
   The Intake stage is now complete and the case is moved to the Review stage.

Complete the Review Stage in Service Request Playbook

Complete the review stage as your second step in resolving a case using the Service Request Playbook.

Before you begin

Role required: admin, sn_gsm.constituent_agent, sn_gsm.business_agent, sn_gsm.agency_agent, sn_gsm.relationship_agent, and sn_gsm.service_manager

Procedure

1. In the contextual side panel, check for duplicate cases using the Related records feature in the contextual side panel.
2. Do one of the following actions depending on whether or not you have duplicate cases.

Options	Steps
If there are no duplicate cases	Select **Request inspection**, then check the box to confirm that there are no similar ser vice requests.
If there are duplicate cases	**a.** In the Parent field, select the search icon ( ) and then select the duplicate case. **b.** Select **Mark as duplicate** and then select **Move to decision** to skip the Process stage to move the case directly to the Decision stage. Select again to confirm. In the Decision stage, the Resolution code is `Void/Cancelled, Duplicate Is sue` by default. **c.** Resolve the case and notify constituents by selecting **Propose solution**. **d.** If the solution doesn't work, select **Repro pose solution** to delete the existing solu tion and then resubmit the case. You're redi rected to the Decision stage, where you can edit any field. Submit the updated so lution and notify constituents by selecting **Propose solution**. After a solution has been proposed, the state of the case changes to Resolved.

3. Fill in the Inspect and report case form.
   For more information on how Public Sector Digital Services integrates with Field Service Management, see Integration with Field Service Management.
4. Do one of the following actions depending on whether a field service agent must be dispatched to the service request location.

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Option	
If a field service agent must be dispatched	**a.** Select **Create work order** if a field service agent must be dispatched to the service re quest location to resolve the issue. **b.** Fill in the details of the work order request. **Note:** Agents can't proceed with the rest of the playbook until the work or der is complete. **c.** Once the work order has been fulfilled, se lect **Move to process** to move to the next ac tivity.
If no field service agent must be dispatched	If a field service agent doesn't need to be dis patched to the service request location, or if Field Service Management hasn't yet been in tegrated with Public Sector Digital Services, select **Record findings** to go to the next activi ty.

5. Fill in the Record findings case form.
6. Verify if any open case tasks need to be closed, and then select **Move to process**.
   The Review stage is now complete and the case is moved to the Process stage.

Complete the Process Stage in Service Request Playbook

Complete the process stage as your third step in resolving a case using the Service Request Playbook.

Before you begin

Role required: admin, sn_gsm.constituent_agent, sn_gsm.business_agent, sn_gsm.agency_agent, sn_gsm.relationship_agent, and sn_gsm.service_manager

Procedure

1. Fill in the Assess resources case form.
2. Do one of the following actions depending on whether a resource approval is required to proceed.

Options	Steps
If a resource approval is required	**a.** Select **Request approval**. The case moves to the **Approve resources** activity, where an approval record case task is created, and each approver can approve or reject the proposed conditions. **b.** After all approvals have been received, select **Start work** to move to the **Perform work** activity.
If a resource approval is not required	If no approvals are needed, select **Start work** to bypass the **Approve resources** activity.

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Options	Steps
	The case is moved to the **Perform work** activity.

3. Fill in the Perform work case form.
4. Do one of the following actions depending on whether a field service agent must be dispatched to the service request location.

Options	Steps
If a field service agent must be dispatched to the request location	**a.** Select **Create work order**. **b.** Fill in the required information and select **Submit**.
If no field service agent must be dispatched	If no field service agent must be dispatched to the service request location, or if Field Service Management hasn't yet been integrated with Public Sector Digital Services, select **Mark complete.**

5. Verify that everything is correct and that you've added all your comments.
6. Select **Move to decision**, and confirm again when prompted.
   The Process Stage is complete and the case is moved to the Decision stage.

Complete the Decision Stage in Service Request Playbook

Complete the decision stage as your last step in resolving a case using the Service Request Playbook.

Before you begin

Role required: admin, sn_gsm.constituent_agent, sn_gsm.business_agent, sn_gsm.agency_agent, sn_gsm.relationship_agent, and sn_gsm.service_manager

Procedure

1. Fill in the Resolve case form.
2. Select **Propose solution**.
   All case tasks must be closed before an agent can propose a solution to the case.
   A notification is sent to the constituent that lets them know that a decision has been reached. The constituent can either accept or reject the solution. If the constituent accepts the solution, the case is automatically closed. If the constituent rejects the solution, the case is reopened, and the agent must propose another solution.

Using the contextual side panel in Service Request Playbook

The contextual side panel provides you with the tools that can help you to research and resolve problems about your cases.

The contextual side panel in the CRM Workspace gives you access to information that can help you resolve government service cases.

It includes a column of icons that you can select to access different types of information.

The following table shows you the tabs that you should see on the contextual side panel in the Service Request Playbook.

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Contextual side panel tabs

Field	Description
Record information icon 	Relevant information about a record. In Service Request Playbook, the ribbon displays the record information, constituent details, the case timeline, and the active and inactive service level agreements (SLAs). For more information on how to view information about the ribbon in playbooks, see View the ribbon information in Service Request Playbook.
Agent assist icon ()	List of search results with the content that is related to the record that you are viewing. The content may include knowledge articles, recommended actions, or other records. For more information, see Agent assist Overview.
Attachments icon ()	Ability for you to attach knowledge base content to a response to the requester in the activity stream.
Template icon ()	Standard content that is related to resolving the issue. To create a template, select the template icon Create.
Response template icon ()	Reusable messages that you can copy and paste into the cases and case tasks. For more information on using and creating response templates, see Use response templates in Service Request Playbook.
Dynamic Related Records icon ()	Related records in the contextual side panel that dynamically change based on the context of the current record or playbook activity.
Activity stream icon	Ability for you to communicate with requesters and make internal notes about the work that is done on a record.

Use response templates in Service Request Playbook

Respond to cases by using the response templates in the contextual side panel in CRM Workspace. Good templates save you time by eliminating repetitive work.

Before you begin

Role required: sn_gsm.constituent_agent, sn_gsm.business_agent, sn_gsm.agency_agent, sn_gsm.relationship_agent, or sn_gsm.service_manager

About this task

Selecting the response templates icon  shows the reusable messages that you can copy and paste into cases and case tasks. For information on how to create response templates, see Create or modify a response template.

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Procedure

1. In the CRM Workspace, open a service request task.
2. In the contextual side panel, select the response templates icon  to display a list of the available templates.
3. In the Response Templates side panel, search for a template.
4. Select a template and then select **Copy** to copy the template to the clipboard.
   Paste the template text into the **Work notes** field or the **Additional comments** field.

Using the activity stream in Service Request Playbook

You can access the activity stream in the contextual side panel in CRM Workspace after you create a service request record. The activity stream enables you to communicate with constituents and make internal notes about the work that is done on a record, making it easier to relay and track the information.

Using the activity stream

You can use an activity stream to communicate with constituents and track the information on a record. The activity stream updates when the current activity in the playbook is updated.

You can access the activity stream by selecting the activity stream icon () in the contextual side panel.

Agent tasks in the activity stream

The following table lists the tasks that you can do in the activity stream.

Agent tasks

Task	Description
View posts for the case or case task	Current activity in the playbook work area that determines the information that is displayed in the activity stream. Scroll through the posts in the Activity section to view the case or task information. Select **Case** or **Task** at the top of the activity stream to switch views.
Add work notes or comments	In the Compose section: 1. Select the **Work notes** or **Comments** activity. 2. Add the information to the text field. 3. Select **Post Work Notes** or **Post Comments**. The post is added to the Activity section. Internal work notes are private and are only visible to other agents. External comments are visible to agents and requesters.

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Agent tasks (continued)

Task	Description
Filter or search posts	Select the filter icon ( ) at the top of the Activity section to display the filter selections: • **Post types:** Select the types of posts to view, such as the work notes or attachments. • **Field changes:** Select the fields that you want to view the posts for in only those fields. • **Flagged:** Enable this button to view the posts that have been flagged as important. • **Filter sets**: Select two or more filters in this list. Select the search icon ( ) to search all activity posts.
Sort posts	Select the sort icon ( ) to sort the posts by the newest to the oldest or the oldest to the newest posts.
Expand and collapse posts	Select the more options icon (•••) to expand and collapse posts: • **Expand all posts**: Expands the posts to view additional details. • **Collapse all posts**: Returns the posts to their previous state.

Viewing the dynamic related records in Service Request Playbook

You can view the dynamic related records in the playbook contextual side panel in CRM Workspace. These records dynamically change based on the current record or playbook activity.

Using related records in Service Request Playbook

You can view, search, and sort the records in the **Related Records** tab in the contextual side panel after you create a service request record. For details on how to create a record, see Create a service request record using playbooks in Public Sector Digital Services.

The **Related Records** tab displays the related records that dynamically change based on the context of the current record or playbook activity. The records that are displayed in the **Related Records** tab depend on the following settings:

- The related record contexts and definitions that have been configured for a record or playbook activity.
- The agent's access permissions to data.

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Types of related records

The related records appear in the list as a read-only card. The initial set of records that display in the list is determined by the record type that you select in the filter at the top of the list. Depending on the related record configuration for the source record or playbook activity, you can see the following types of related records:

- Similar Service Requests
- Open Case Tasks
- Related Work Orders
- Blocked Tasks
- Emails
- Approvals
- SLAs
- Escalations for the case or customer

Default related records

The following table shows the default related records that are based on each playbook step.

Default related records

Stage	Playbook Activity	Default related record
Intake	All activities	Similar Service Requests
Review	Check similar requests	Similar Service Requests
Review	• Inspect and report • Record findings	Open Case Tasks
Process	• Assess resources • Perform work	Open Case Tasks
Process	Approve resources	Approvals
Decision	All activities	Open Case Tasks

You can search the Related Records list by entering the text in the search field or by filtering the list to display the records of a specific type. You can expand a card to show a more detailed view or open the list in a subtab. If you have the create permission, you can also create new related records of the selected type.

Customizing the related records view

The following table lists the customization options for the related records view.

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Customizing the Related records view

Task	Description
View the related records in the contextual side panel	Related Records icon ( ) that you can select to view the Related Records list. Related records appear as a card format in the list. The initial set of records that display in the list is determined by the record type that you select in the filter at the top of the list.
Select the type of related record to view	Filter at the top of the Related Records list where you can select the type of related records to view. You can also use the filter to see the current selection. For more information, see Customize the related records view in Service Request Playbook.
Search the related records list	Search field at the top of the Related Records list to perform a text search. Records that match the search text are highlighted. For more information, see Customize the related records view in Service Request Playbook.
Open a related record in a subtab	Card in the Related Records list that you can use to open the record in a subtab under the parent record. In the subtab, you can view the record details and perform the available actions.
Open the related record list in a list view in a subtab	List view icon ( ) to display the related records in a list view in a subtab under the parent record.
Create a new record for the selected related list	New record for the record type that is currently selected in the Related Records list. This action opens a new record form in a subtab under the parent record.

View the ribbon information in Service Request Playbook

You can view the information about the ribbon in the contextual side panel in CRM Workspace. The ribbon displays the important information about the case, such as the service record information, constituent contact details, and the case timeline.

Select the record information icon ( ) in the contextual side panel to view the information about the ribbon.

You can see the information about the fields in the contextual side panel in the following table.

Contextual Side Panel Ribbon fields

Field	Definition
Record Information	Fields, case record number, short description, stage, state, and address.

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Contextual Side Panel Ribbon fields (continued)

Field	Definition
Requester Overview Card	Details about the constituent and contact for the case.
Timeline	Chronological summary of the case activities, including the case state changes and interactions between the agent and the customer. You can also see how much time that the agent and customer spent on the case.
SLAs	Active service level agreements (SLAs) for the case, including the time remaining, the SLA state, and any breaches.

Customize the related records view in Service Request Playbook

You can customize the related records view in Service Request Playbook.

The following table lists the customization options for the related records view.

Customizing the Related records view

Task	Description
View the related records in the contextual side panel	Related Records icon ( ) that you can select to view the Related Records list. Related records appear as a card format in the list. The initial set of records that display in the list is determined by the record type that you select in the filter at the top of the list.
Select the type of related record to view	Filter at the top of the Related Records list where you can select the type of related records to view. You can also use the filter to see the current selection. **1.** Select the filter icon ( ). **2.** Select a record type from the menu. The menu includes the related lists that have been configured for the parent record.
Search the related records list	Search field at the top of the Related Records list to perform a text search. Records that match the search text are highlighted. **1.** In the search field at the top of the Related Records list, enter the search text. **2.** Select the search icon ( ).

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Customizing the Related records view (continued)

Task	Description
	Note: The search field is grayed out if search is not available for the selected type of related records.
Open a related record in a subtab	Card in the Related Records list that you can use to open the record in a subtab under the parent record. In the subtab, you can view the record details and perform available actions.
Open the related record list in a list view in a subtab	Display the related records in a list view in a subtab under the parent record by selecting the subtab icon ( ).
Create a new record for the selected related list	New record for the record type that is currently selected in the Related Records list. This action opens a new record form in a subtab under the parent record. 1. Select the create record icon ( ) at the top of the Related Records list. 2. Fill in the fields on the record form and select **Save**.

Track government service requests using Service Request Playbook

Track all the service requests that are assigned to you or other agents in your government agency by using the Service Request Playbook.

Before you begin

Role required: sn_gsm.constituent_agent, sn_gsm.business_agent, sn_gsm.agency_agent, sn_gsm.relationship_agent, and sn_gsm.service_manager

About this task

When you select a case, a form opens with the following sections:

- A conversation of the interaction between the user and the government service agent.
- The action that needs to be taken on the user's part, such as accepting or rejecting a solution.
- The case details, including the case number and status.
- Any attached files.

Procedure

1. Open the Service Request Playbook by navigating to Lists in the CRM Workspace.
2. Navigate to the **Service Requests** list and click **All**.
3. In the Service Requests section, select a list that is described in the following table:

Service Request Lists

List	Description
All	All service request cases that the agent has access to.
My Cases	All service request cases that are assigned to the agent.

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List	Description
My Open	Open cases that are assigned to the government service agent.
Unassigned for my group	Cases that belong to any of the government service agent's groups but haven't been assigned to an agent.

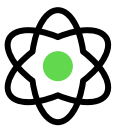
You can see the following fields under each list:

- Number
- Short description
- Action status
- Service
- Constituent
- Business
- Business contact
- State
- Address type
- Reported on
- Assigned to agency
- Assigned to

For a detailed description of these fields, see Government Service Case form.

Using Solutions for Public Sector Digital Services

Use solutions in PSDS to perform tasks.

Grants Management	Investigative Case Management	
 Handle applications for grants submitted by public sector users.	 Organize, track, and resolve investigations at all levels of government.	

Using Investigative Case Management for Public Sector Digital Services

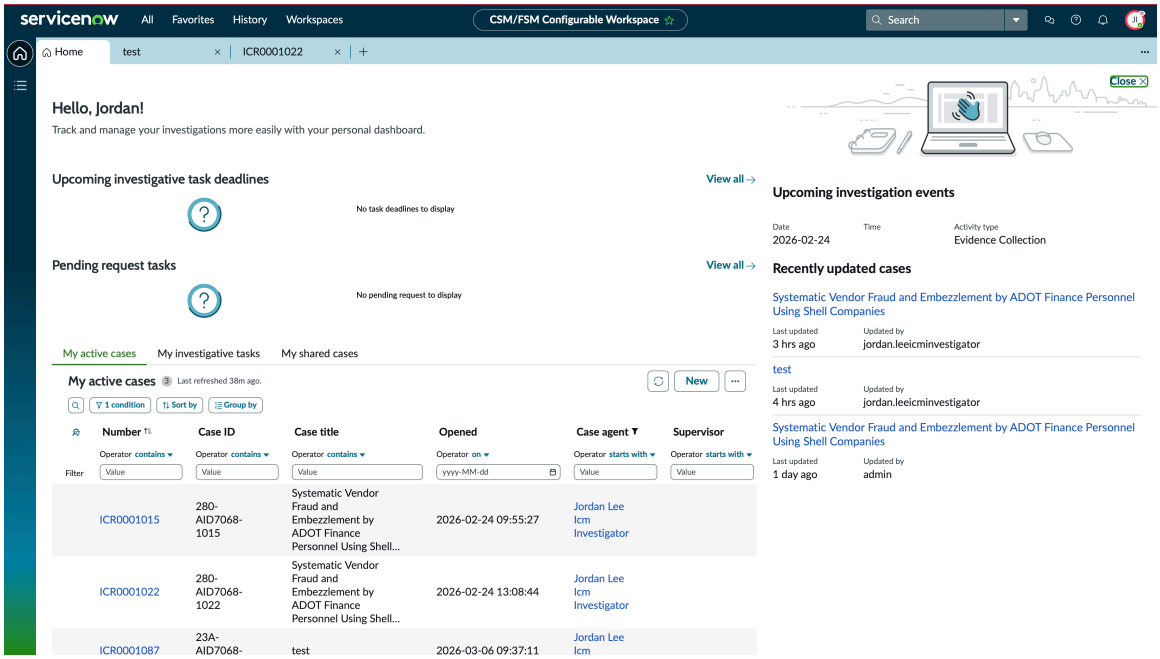
As an investigator or supervisory agent, you can use the Investigative Case Management application to keep track of case tasks, assets, entities, and all shared information relating to a case. You can work on cases collaboratively with other investigators and managers, and use generative AI skills to summarize cases and case narratives.

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Investigator Landing Page

The Investigative Case Management experience begins on the ICM landing page for investigators and supervisors. Investigative organizations may customize their landing pages with branding colors or other display changes, but the components may remain the same.

The following is an example of how the default landing page appears in the CRM Workspace ICM workspace for an investigator or supervisory agent.

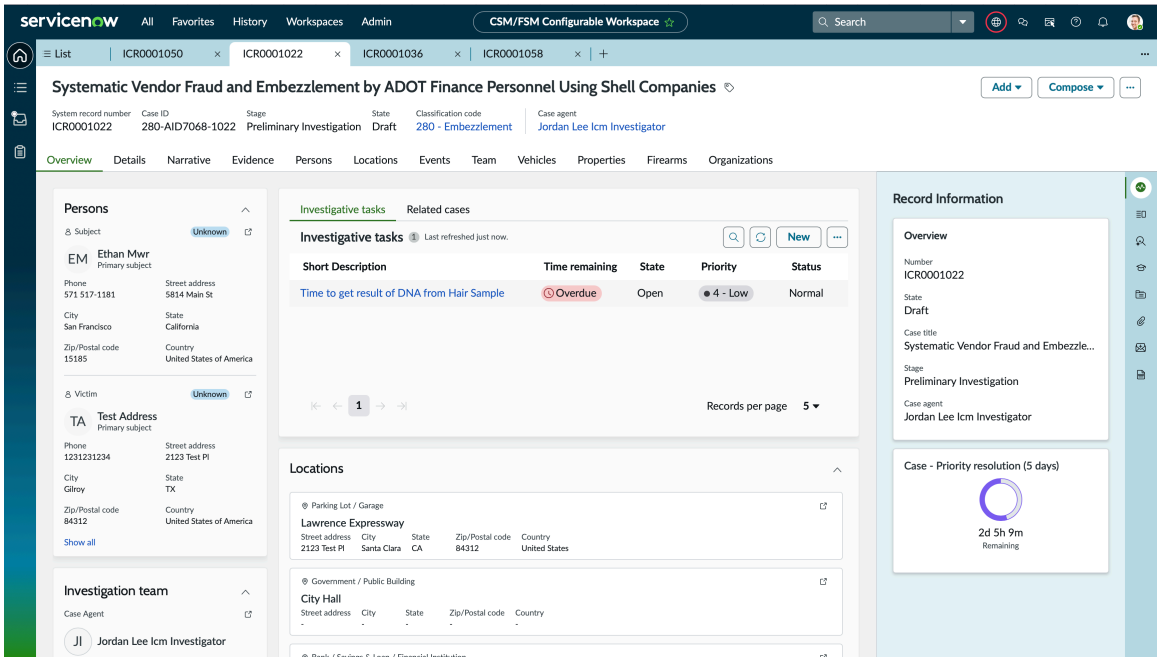


Here, you can see your workload at a glance, showing active cases, shared cases, upcoming deadlines and events, recent activity, and pending tasks. You can customize this view to your preferences, sorting cases and tasks with custom filters. You can create a case directly from this view, or you can navigate to the Lists menu to create it from there.

Investigative Case Record

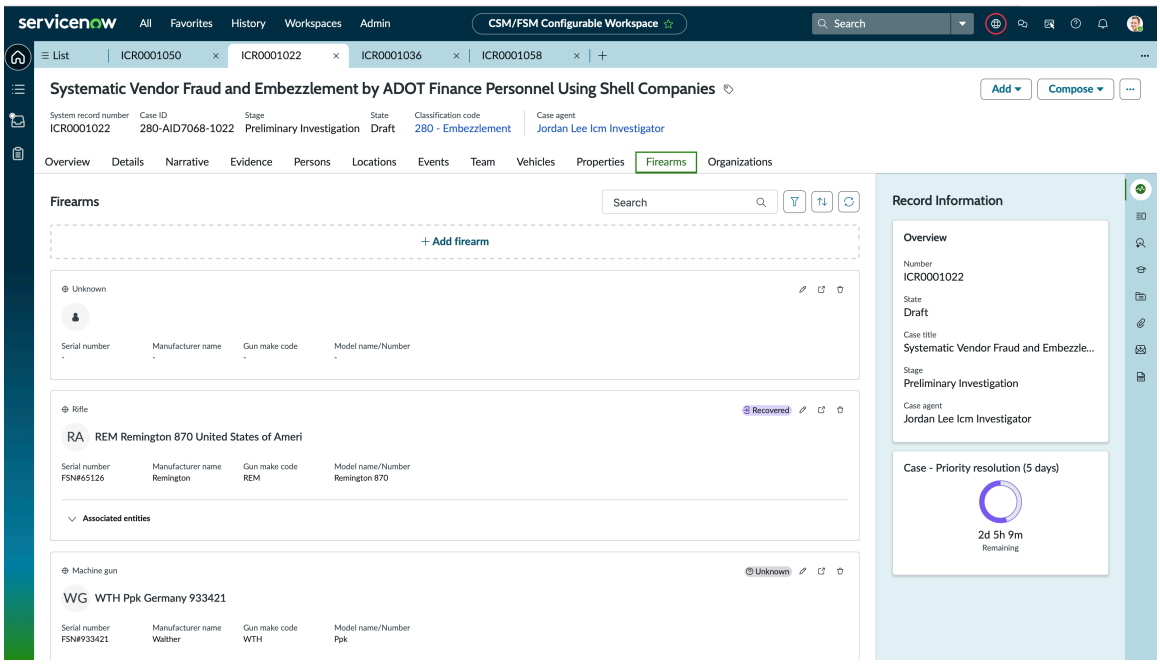
For investigators, the case record page aims to be a one-stop shop. Once you open a case, you can see every case detail (narrative, evidence, entities, tasks, and case team) organized into a single case record.

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Entity Management

For investigators, the entity management feature provides visibility across all entities related to the case, creating a master index of persons, property, vehicles, organizations, locations, events, and firearms that are all linkable to cases and each other, and helping investigators detect connections between them. Investigators can add as many entities to the case as they need.



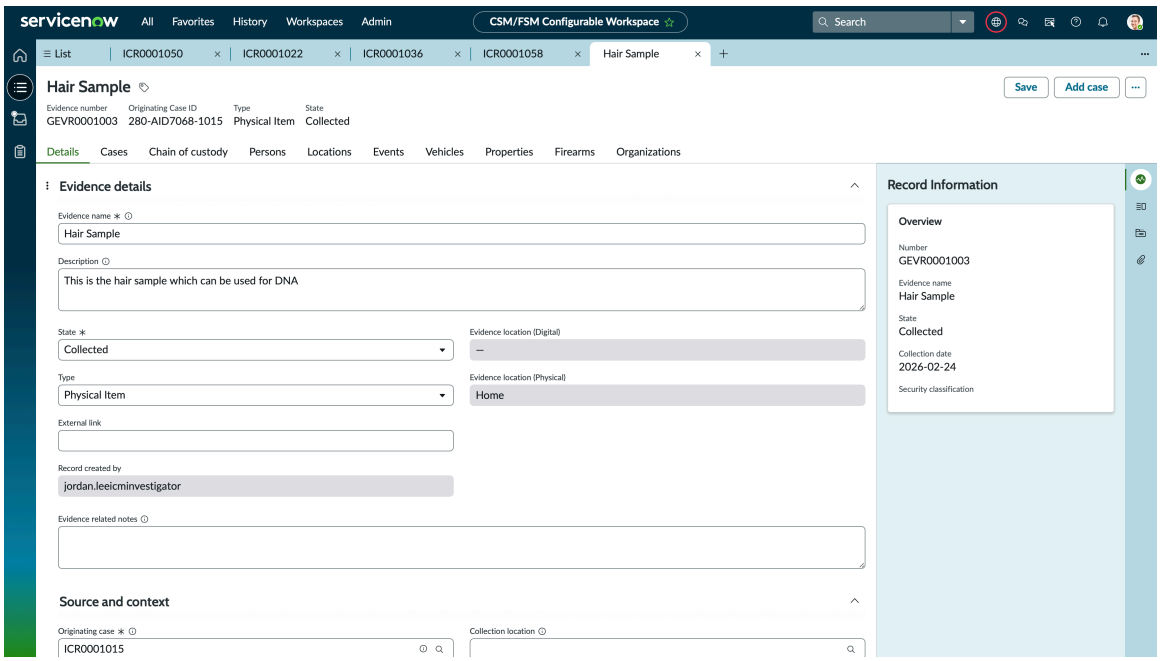
For more information on using the Entity management feature, see Using Entity Management.

Evidence Management

For investigators, the Evidence management feature allows investigators to manage physical and digital evidence with structured fields for collection details, classification, and links to related entities, all within the case record. Investigators can create Chain of custody documentation in

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every evidence record, capturing each transfer from the moment of collection. Evidence, cases, and entities are all connected, so investigators can link and document connections.



For more information on using the Entity management feature, see Using Evidence Management.

Create an investigative case in Investigative Case Management

As an investigator (case agent), you can get started on an investigative case directly from the Investigative Case Management workspace, filling in as much supporting information as you have.

Before you begin

Role required: icm.investigator, admin

Procedure

1. Navigate to the CRM Workspace and select **My active cases** > **New**.
   Alternatively, you can create a new case using the CRM Workspace Lists menu by selecting **Lists** > **Investigative Cases** > **All** > **New**.
2. Select the case classification code from the dropdown menu to select the investigation type. By default, the workspace provides several generic classification codes that correspond to different investigative case types, but these may not correspond to your organization's internal codes. An admin can create and custom classification codes that more closely correspond to your investigative organization. For more information on this configuration, see Modify case classification codes.
3. Enter the case title and a summary of the case.
   The case summary is different from the case narrative.
4. Enter the source of the case information.
   For example, if the case is being filed because of a constituent or witness complaint, select **Complaint**.
5. Provide a brief description of the source.
6. Fill in any routing information for the case, such as the division responsible for the case, and the Supervisory reviewer.

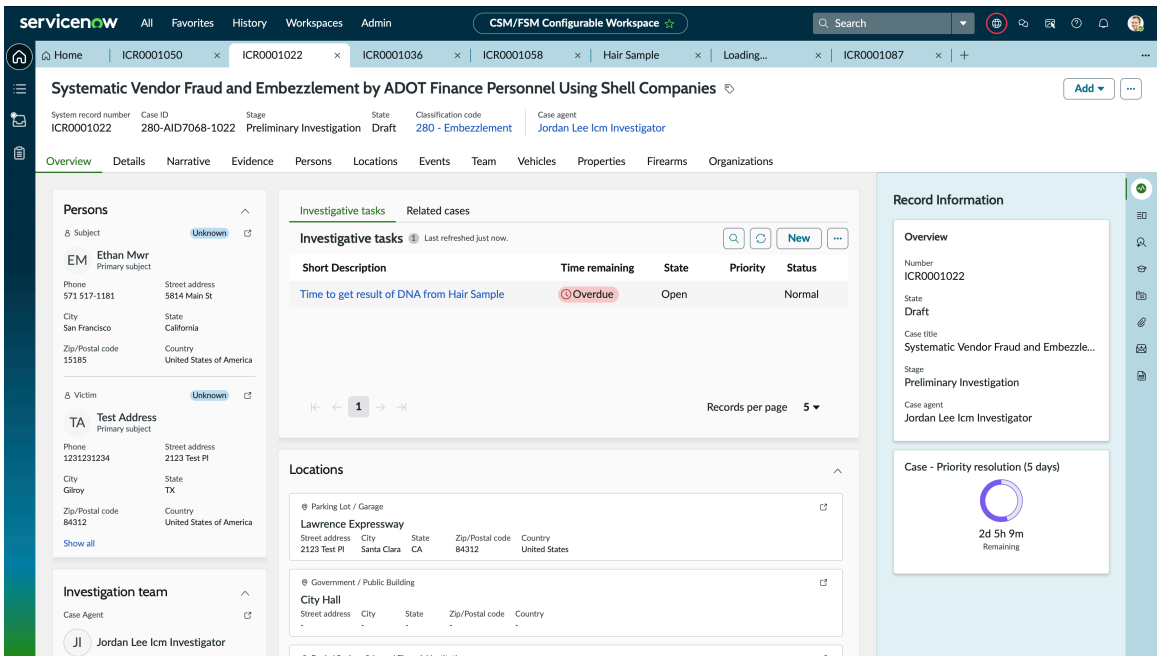
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The assigned office and originating office fields are auto-populated based off the logged in user. For more information on the case details form fields, see Investigative Case Management case details form.

7. Select **Save** once you have filled in the details of the case.

Result

A case has now been created and can be worked on through the Investigative Case Management workspace. You can add evidence and entities, assign team members, or link it to another case.



What to do next

Add supporting details to the case narrative. For information on how to do this, see Create an investigative case narrative in Investigative Case Management.

Create an investigative case narrative in Investigative Case Management

Add supporting details to the case narrative to organize ongoing updates and investigative context. Information from a police report, witness complaint, or lead may go in the case narrative in order to organize pertinent information into one place.

Before you begin

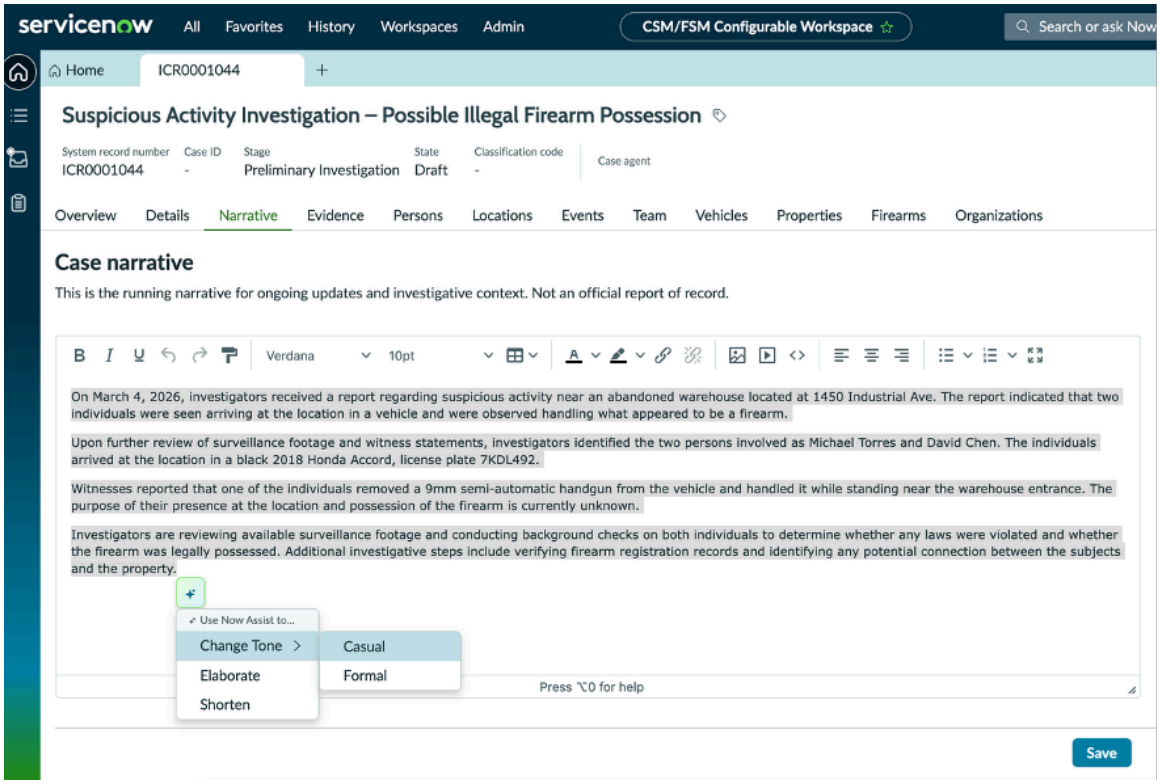
Role required: icm.investigator

Procedure

1. Navigate to the CRM Workspace and select **My active cases**.
   Alternatively, you can select a case using the CRM Workspace Lists menu by selecting **Lists** > **Investigative Cases** > **All** and selecting the case.
2. Select the case you wish to add narrative details to.
3. Select the **Narrative** tab.
4. In the Case Narrative field, enter the narrative details.

   You can refine the text entered in this field using the ServiceNow Otto for PSDS Case Narrative refinement skill. For more information on this skill and how to use it, see Refine an investigative case narrative using the ServiceNow Otto for PSDS Investigative case narrative refinement skill.

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5. Select **Save**.

Result

The case narrative has been created. A log of edits attached to the users name appears in the activity stream, where team members assigned to the case can see a running log of what information was added and when. This is helpful if there are multiple investigators and other personas involved in the case. The case narrative can be edited and added to at any time as new details, leads, and context become available.

What to do next

Add an entity to the case. For information on how to do this, see the following:

Related topics

- Add an associated person to an Investigative case
- Add a location to an investigative case
- Add a related property to an investigative case
- Add an associated event to an investigative case
- Add an associated vehicle to an investigative case
- Add an associated organization to an investigative case
- Add an associated firearm to an investigative case

Using Investigative Case Management Entity Management

Investigators can use the Investigative Case Management Entity Management feature to manage all entities (persons, locations, vehicles, property, firearms, organizations) related to a case.

Use a centralized Investigative Entity Management system with m@ster indexes for to reduce duplication and improve cross-case visibility. It enables creation and management of incident and investigation event timelines, role assignments, and entity linking within case workspaces.

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Key features include dedicated management tabs, data models for entities and relationships, audit tracking, and retention policies. This enhances investigative insights, data integrity, and collaboration while supporting AI efforts for smart import and case creation.

Investigators can view all individuals, entities, and locations connected to a case or recurring across cases. This improves investigative insights, reduces data entry duplication, and ensures that critical connections—like repeat offenders or high-risk addresses—aren't missed. Analysts and supervisors benefit from improved data integrity, faster case development, and more informed decision-making.

With the Entity Management feature, investigators can:

- Create and view common master indices for Persons, Locations, Organizations, Vehicles, Property associated with the case through dedicated entity tabs. This can help reduce duplicates for all entities (“John Smith” and “Johnny Smith” might be the same person).
- Associate multiple entities to each other and to the case
- Create and manage a centralized Firearms master index to unify firearm records across investigations, storing critical identifiers, traits, and historical data in a dedicated Firearms tab and allowing firearms to be linked to related entities (persons, events, cases, evidence, organizations, locations, property) within the case
- Create incident and investigation event records to help capture the timeline for important events that happen during the investigation, and the timeline of the investigation itself
- View audit logs for all firearm record changes and relationship updates
- Associate multiple entities to each other and to the case, and manage all entities and their relationships to the case
- Render all entities, evidence, tasks, and related cases as an interactive knowledge graph; set any node as the home node to re-map relationships, then export to PDF/PPT.
- Auto-create an immutable, time-stamped snapshot of a shared entity at case association, and provide insights into how many active cases an edit will affect — with a full who/when/what audit trail.
- Quickly configure case access by office and/or assignment group.

Entities in Investigative Case Management

Investigators can access Entity Management directly from the Investigative Case Management workspace through any of the seven dedicated Entity tabs.

The following entity types are included with Investigative Case Management by default, and investigators can add as many as necessary to the case through the ICM workspace.

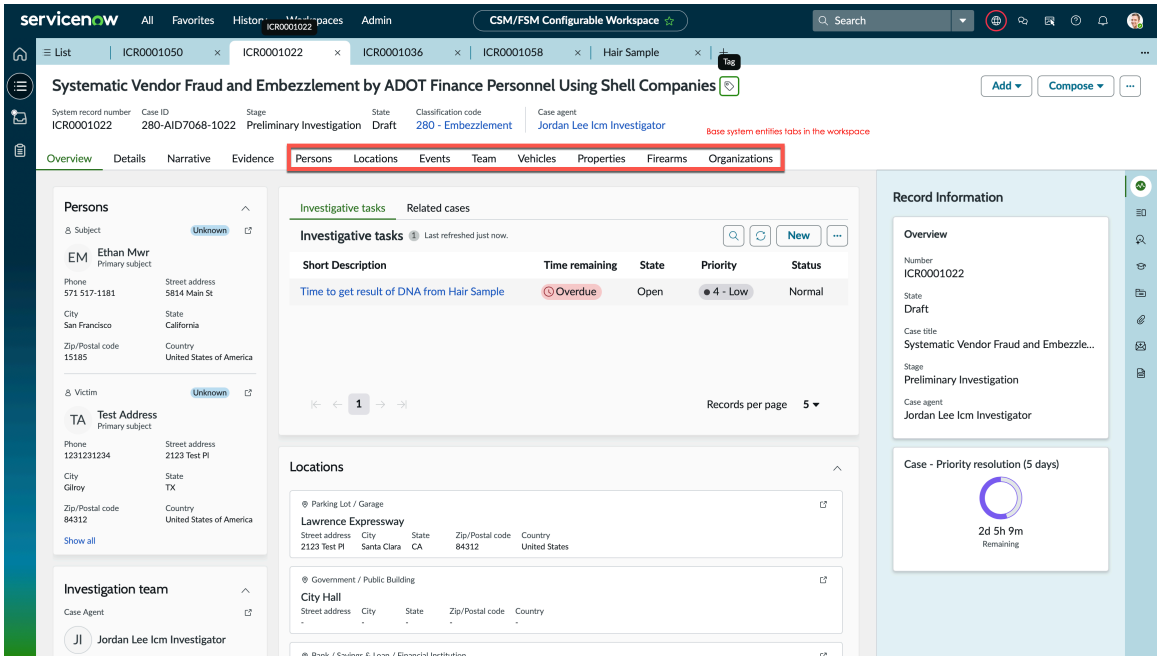
- Persons
- Locations
- Events
- Vehicles
- Property
- Organization
- Firearm

ICM supports management of persons, property, vehicles, organizations, locations, and events. Specialized entity types like firearms include detailed identification, specifications, origin, and ballistic information, all linkable to cases and to each other.

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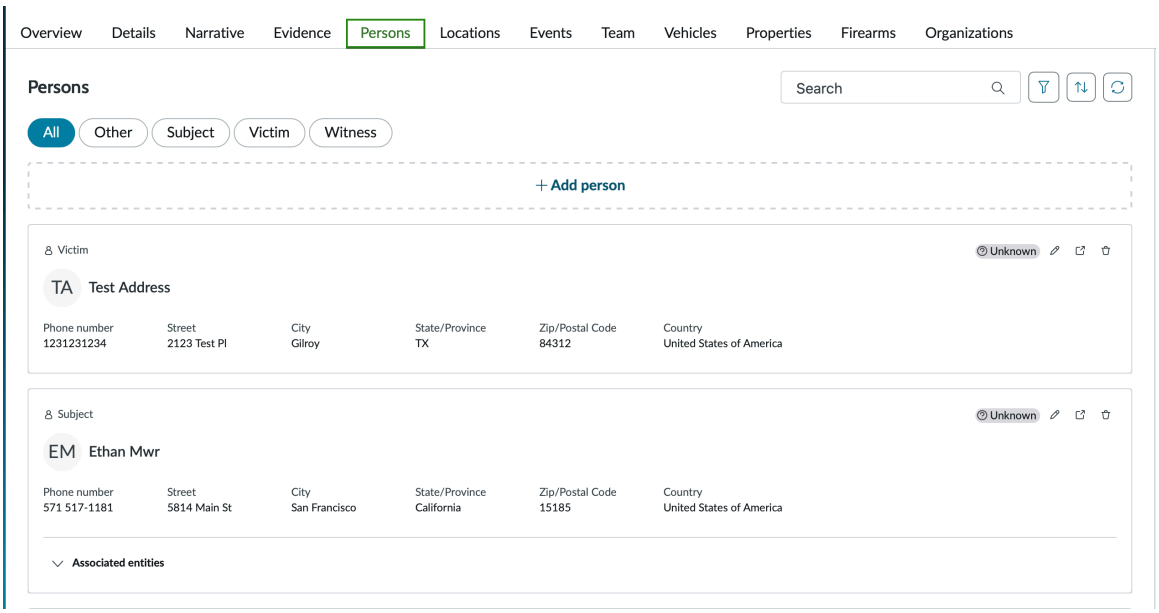
Entity Tabs

Investigators and supervisors will mainly interact with case entities through the dedicated entity tabs in the workspace. Each tab allows the user to create as many records as needed, and add related cases and associate other entities.



Persons

The Person tab allows users to create and manage person records. Users can add new Persons, view existing ones in a related tab or list, and edit records. Users can add different person types to a case using the categories provided. Users are also able to link/delete other associated entities to a person, and view associated entities.



Vehicles

The Vehicles tab allows users to create and manage vehicle records. Users can add new vehicles, view existing ones in a related tab or list, and edit them. It also

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supports linking to other entities for context and traceability. The vehicle index and firearm index tables are an extension of the property index table.

Locations

The Locations tab allows users to store critical information about case locations and their relationship to the case.

Events

The Events tab allows users to create incident and investigation event records. These records help capture the timeline for important events that happen during the investigation.

Property

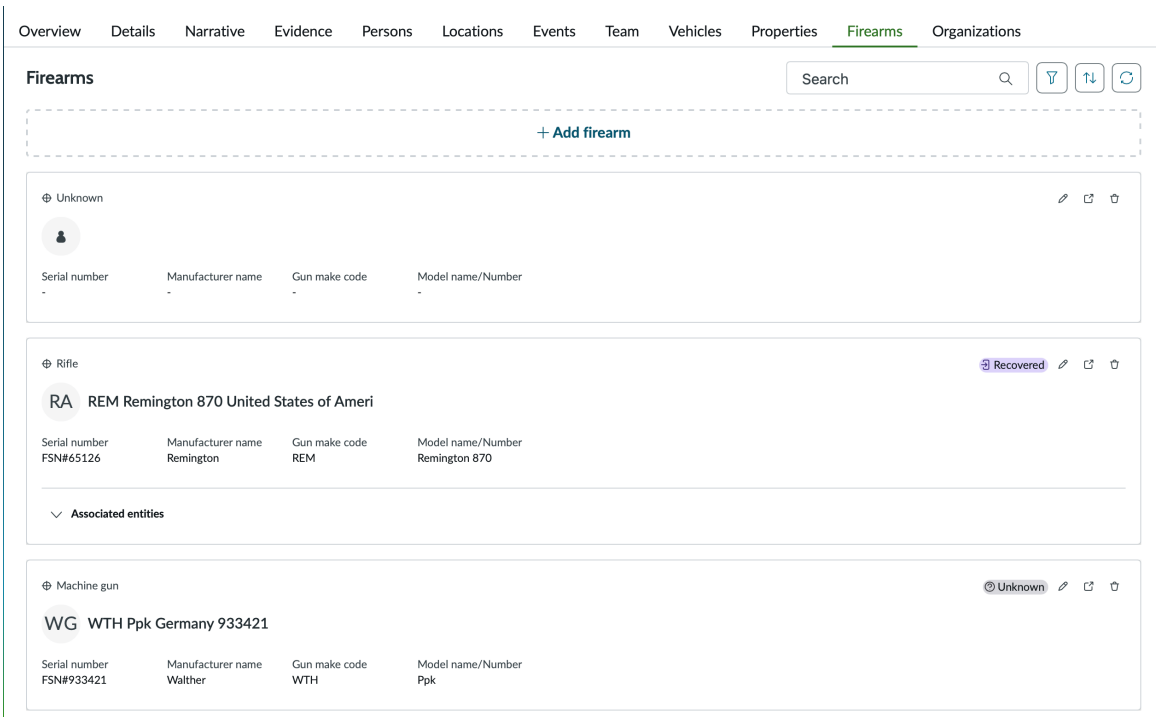
The Property tab allows users to create and manage property records. Users can add new properties, view existing ones in a related tab or list, and edit them. It also supports linking to other entities for context and traceability.

Organizations

The Organization tab allows users to create and manage records of organizations that are related to the case. Users can add new organizations, view existing ones in a related tab or list, and edit details as they are available. It also supports linking to other entities for context and traceability.

Firearm

The Firearm tab allows users to create and manage firearm records. Users can create and manage firearms and manually related entities. Each firearm profile stores critical identifiers, traits, and historical data. Users can add new firearms, view existing ones in a related tab or list, and edit them. The vehicle index and firearm index tables are an extension of the property index table.



Entity Completeness

In the Entity Management form, not every field is mandatory. The form captures as much information as possible, without imposing strict restrictions on the information that can be

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added. However, each entity record contains a completeness field that tracks whether the record has sufficient data to be searchable within ICM.

An entity is only returned in search results when its completeness field is set to true. Completeness is recalculated automatically whenever relevant fields are updated, ensuring search visibility reflects the current state of the record. To see completeness rules for each entity type, see Completeness Rules by Entity Type.

Add entities to an investigative case using Investigative Case Management Entity Management

Add an associated entity to an investigative case for increased tracking and traceability surrounding all assets related to the case.

You can add the following entities to a case using the Investigative Case Management Entity Management feature.

Add an associated person to an Investigative case

Add an associate person to an investigative case. This person can be a subject, victim, witness, or another category.

Before you begin
Role required: icm.investigator, supervisory_agent

About this task

Note: Not all of the fields are mandatory, but there is a minimum amount of information required for the record to be considered complete and thus searchable within the case workspace. For more information on entity completeness rules, see Completeness Rules by Investigative Case Management Entity Type.

Note: Adding a person through the Persons tab does not affect roles at the user level.

Procedure

1. Navigate to the CRM Workspace and select **My active cases**.
   Alternatively, you can select a case using the CRM Workspace Lists menu by selecting **Lists** > **Investigative Cases** > **All** and selecting the case.
2. Select the case you wish to add a person entity record to.
3. Select the **Persons** tab.
4. On the form, fill in the fields with identifying information.
   For more information about the form fields used to capture the details of the persons record, see ICM Entity Management Person form.
5. Enter a brief description of the relationship this person has to the case, then select **Save**.
   The person is now associated to the case as a witness, victim, subject, or other category.
6. **Optional:** Once other entities have been added to the case, you can link them to any number of persons associated with the case.
   For example, if you've already added a vehicle in the Vehicle entity tab, you can associate this person with the vehicle. To do so, select **Link Associated Entity**, and select the existing entity via the dropdown.

Add a related property to an investigative case

Add property items that are related to an investigative case created in the Investigative Case Management application.

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Before you begin
Role required: icm.investigator, supervisory_agent

About this task
Note: Not all of the fields are mandatory, but there is a minimum amount of information required for the record to be considered complete and thus searchable within the case workspace. For more information on entity completeness rules, see Completeness Rules by Investigative Case Management Entity Type.

Procedure
1. Navigate to the CRM Workspace and select **My active cases**.
   Alternatively, you can select a case using the CRM Workspace Lists menu by selecting **Lists** > **Investigative Cases** > **All** and selecting the case.
2. Select the case you wish to add a property entity to.
3. Select the **Property** tab.
4. On the form, fill in the fields with information about the property.
   For more information about the form fields used to capture the details of the property record, see ICM Entity Management Property form.
5. Enter a brief description of the relationship this property has to the case, then select **Save**.
6. **Optional:** Once other entities have been added to the case, you can link them to any number of entities associated with the case.
   For example, if you've already added a person in the Persons entity tab, you can associate this property with the person. To do so, select **Link Associated Entity**, and select the existing entity via the dropdown.

Add a location to an investigative case

Add locations that are related to an investigative case created in the Investigative Case Management application.

Before you begin
Role required: icm.investigator, supervisory_agent

About this task
Note: Not all of the fields are mandatory, but there is a minimum amount of information required for the record to be considered complete and thus searchable within the case workspace. For more information on entity completeness rules, see Completeness Rules by Investigative Case Management Entity Type.

Procedure
1. Navigate to the CRM Workspace and select **My active cases**.
   Alternatively, you can select a case using the CRM Workspace Lists menu by selecting **Lists** > **Investigative Cases** > **All** and selecting the case.
2. Select the case you wish to add a location entity to.
3. Select the **Location** tab.
4. On the form, fill in the fields with information about the location.
   For more information about the form fields used to capture the details of the location record, see ICM Entity Management Location form.
5. Enter a brief description of the relationship this location has to the case, then select **Save**.

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6. **Optional:** Once other entities have been added to the case, you can link them to any number of entities associated with the case.
   For example, if you've already added a person in the Persons entity tab, you can associate this location with the person. To do so, select **Link Associated Entity**, and select the existing entity via the dropdown.

Add an associated event to an investigative case

Add investigative events or incident events that are related to an investigative case created in the Investigative Case Management application.

Before you begin
Role required: icm.investigator, supervisory_agent

About this task
With Investigative Case Management, investigators can create incident and investigation event records to help capture the timeline for important events that happen during the investigation, and the timeline of the investigation itself. The entity tab list can be filtered by investigation events or incident events.

Note: Not all of the fields are mandatory, but there is a minimum amount of information required for the record to be considered complete and thus searchable within the case workspace. For more information on entity completeness rules, see Completeness Rules by Investigative Case Management Entity Type.

Procedure

1. Navigate to the CRM Workspace and select **My active cases**.
   Alternatively, you can select a case using the CRM Workspace Lists menu by selecting **Lists** > **Investigative Cases** > **All** and selecting the case.
2. Select the case you wish to add a Event entity to.
3. Select the **Event** tab.
4. Select the event type, **Investigations** or **Incident**.
5. On the form, fill in the fields with information about the event, such as the event details, and date and time.
   For more information about the form fields used to capture the details of the event record, see ICM Entity Management Events form.
6. Enter a brief description of the relationship this event has to the case, then select **Save**.
7. **Optional:** Once other entities have been added to the case, you can link them to any number of entities associated with the case.
   For example, if you've already added a location in the Locations entity tab, you can associate this event with the location. To do so, select **Link Associated Entity**, and select the existing entity via the dropdown.

Add an associated vehicle to an investigative case

Add vehicles that are related to an investigative case created in the Investigative Case Management application.

Before you begin
Role required: icm.investigator, supervisory_agent

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About this task

Note: Not all of the fields are mandatory, but there is a minimum amount of information required for the record to be considered complete and thus searchable within the case workspace. For more information on entity completeness rules, see Completeness Rules by Investigative Case Management Entity Type.

Procedure

1. Navigate to the CRM Workspace and select **My active cases**.
   Alternatively, you can select a case using the CRM Workspace Lists menu by selecting **Lists** > **Investigative Cases** > **All** and selecting the case.
2. Select the case you wish to add a vehicle entity to.
3. Select the **Vehicle** tab.
4. On the form, fill in the fields with identifying information about the vehicle.
   For more information about the form fields used to capture the details of the vehicle record, see ICM Entity Management Vehicle form.
5. Enter a brief description of the relationship this vehicle has to the case, then select **Save**.
6. **Optional:** Once other entities have been added to the case, you can link them to any number of entities associated with the case.
   For example, if you've already added a location in the Locations entity tab, you can associate this vehicle with the location. To do so, select **Link Associated Entity**, and select the existing entity via the dropdown.

Add an associated organization to an investigative case

Add organizations that are related to an investigative case created in the Investigative Case Management application.

Before you begin

Role required: icm.investigator, supervisory_agent

About this task

Note: Not all of fields are mandatory, but there is a minimum amount of information required for the record to be considered complete and thus searchable within the case workspace. For more information on entity completeness rules, see Completeness Rules by Investigative Case Management Entity Type.

Procedure

1. Navigate to the CRM Workspace and select **My active cases**.
   Alternatively, you can select a case using the CRM Workspace Lists menu by selecting **Lists** > **Investigative Cases** > **All** and selecting the case.
2. Select the case you wish to add a organization entity to.
3. Select the **Organization** tab.
4. On the form, fill in the fields with identifying information about the organization.
   For more information about the form fields used to capture the details of the organization record, see ICM Entity Management Organization form.
5. Enter a brief description of the relationship this organization has to the case, then select **Save**.
6. **Optional:** Once other entities have been added to the case, you can link them to any number of entities associated with the case.
   For example, if you've already added a location in the Location entity tab, you can associate this organization with the location. To do so, select **Link Associated Entity**, and select the existing entity via the dropdown.

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Add an associated firearm to an investigative case

Add firearms that are related to an investigative case created in the Investigative Case Management application.

Before you begin

Role required: icm.investigator, supervisory_agent

About this task

With Investigative Case Management, Investigators can create and manage a centralized firearms master index to unify firearm records across several investigations. This master index stores critical identifiers, traits, and historical data in a dedicated Firearms tab, and allows firearms to be linked to related entities (persons, events, cases, evidence, organizations, locations, property) within the case. Users are able to add new firearms, view existing ones in a related tab or list, and edit them, and view audit logs for all firearm record changes and relationship updates.

Note: Not all of the fields are mandatory, but there is a minimum amount of information required for the record to be considered complete and thus searchable within the case workspace. For more information on entity completeness rules, see Completeness Rules by Investigative Case Management Entity Type.

Procedure

1. Navigate to the CRM Workspace and select **My active cases**.
   Alternatively, you can select a case using the CRM Workspace Lists menu by selecting **Lists** > **Investigative Cases** > **All** and selecting the case.
2. Select the case you wish to add a firearm entity to.
3. Select the **Firearm** tab.
4. On the form, fill in the fields with identifying information about the firearm.

   Each firearm profile stores critical identifiers, traits, and historical data. For more information about the form fields used to capture the details of the organization record, see ICM Entity Management Firearm form.
5. Enter a brief description of the relationship that this firearm has to the case, then select **Save**.
6. **Optional:** Once other entities have been added to the case, you can link them to any number of entities associated with the case.
   For example, if you've already added a persons record via the Persons entity tab, you can associate this firearm entity record with the person. To do this, select **Link Associated Entity**, and select the existing entity via the dropdown.

Associate and link multiple entities

Add associated entities to each other within a case created in the Investigative Case Management application workspace. All entities available in the ICM master index can be linked together.

Before you begin

Role required: icm.investigator, supervisory_agent

With ICM Entity Management, investigators can create and associate multiple entities to each other and to the case, as well as manage all entities and their relationships to the case, all from one workspace.

Before you can link entities, make sure an entity record has been created for it **within** the case. For more information on how to create an entity record for a related person, property, vehicle,

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or other entity and associate it with the case, see Add entities to an investigative case using Investigative Case Management Entity Management.

Procedure

1. Navigate to the CRM Workspace and select **My active cases**.
   Alternatively, you can select a case using the CRM Workspace Lists menu by selecting **Lists** > **Investigative Cases** > **All** and selecting the case.
2. Select the tab that contains the entity you wish to associate with another.
   This can be a vehicle, person, organization, firearm, property, location, or event.
3. Select the pencil icon next to the entity to edit the record.
   In this view, you can see all of the entities that this entity has already been associated with.
4. Select **Link Associated Entity**.
5. Select the entity type from the dropdown menu.
6. Select the existing entity from the dropdown menu.
   If the entity does not appear in the dropdown, verify that it has been created within the open case.
7. Select the relationship type.
   The choices displayed here vary based on what two types of entities you are trying to link. If you are trying to link a person to a location, for example, the person can either:
   - Have witnessed an event at that location
   - Resides at that location
   - Works at that location
   - Experienced an incident or event at that location
8. Select **Save** to link the open entity to the selected one.

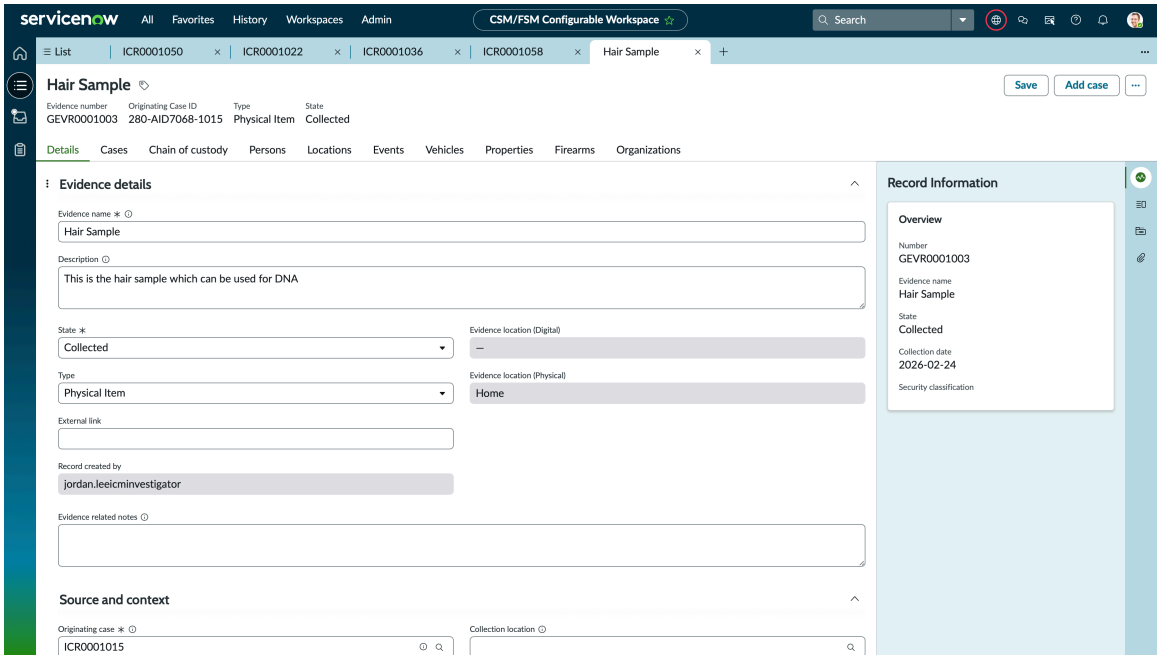
Result

The entities are now linked to each other, allowing an investigator can build a web of assets related to the case.

Using Investigative Case Management Evidence Management

Investigative Case Management Evidence Management guides investigators through the process of logging and managing all physical and digital evidence associated with a case, ensuring it's consistently classified, accessed, and associated with relevant investigative records.

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The Evidence Management feature provides a structured, searchable record system for managing evidence across all investigative contexts, whether the evidence is a physical item stored in a law enforcement evidence locker, or a digital file hosted on a cloud platform. With thorough metadata, customizable access controls, and auto-linkage to cases, people, locations, events, and other entities, investigators can track and integrate evidence into case data. For civilian and internal investigative units, Evidence Management offers a comprehensive method for documenting evidence custody, keeping related records, and maintaining audit compliance.

With Evidence Management, investigators and supervisors can:

- Upload or log new evidence (physical or digital, such as documents, images, web-hosted files, or physical items) and view a list of evidence records per case
- Map evidence to the investigation and assign it to a subject, event, location entity
- Link evidence to a person, location, event, vehicle, property, or organization
- Capture and store key metadata, such as evidence type, evidence source, the date it was received, and associated notes
- Track the movement, transfer, and status changes of evidence records with timestamps and responsible personnel for each action with the digital chain of custody feature.
- Track custody or handler information for a piece of evidence in a dedicated chain-of-custody record with audit logging, capturing when and by who something was opened and viewed

Investigators can access Evidence Management directly from the Investigative Case Management workspace through the dedicated **Evidence** tab. The Evidence table in Investigative Case Management is a structured data model for managing all physical and digital evidence, so data can be consistently classified, accessed, and associated with relevant investigative records. Within the **Evidence** tab, you can create an evidence record for a piece of evidence, create a chain of custody log to track its movement, and link evidence records to existing entities within the case. Evidence can be linked to the following entities:

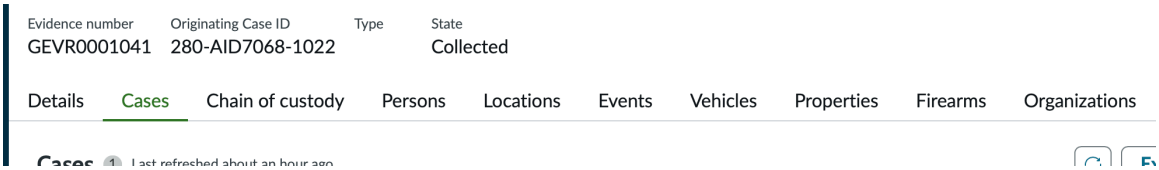
- Persons (subjects, victims, witnesses)
- Locations (scene of crime, office, storage)
- Events (arrest, tip-off, scene visit)

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- Vehicles (suspect or involved vehicles)
- Property (items discovered or stolen)
- Organizations (gangs, schools, employers)

For information on how to link evidence to entities, see Associate and link evidence to entities.

Evidence Tabs



In Evidence Management, an investigator can view details about the evidence through the evidence record page. The evidence record page has the following tabs:

Details

View high-level details about the evidence record, such as evidence notes, and how the evidence is related to the case.

Cases

View the cases that are linked to the evidence record. An investigator can link multiple cases to one evidence record.

Chain of Custody

Track the movement, transfer, and status changes of evidence records with timestamps and responsible personnel for each action with the digital chain of custody feature.

Persons

The **Persons** tab allows investigators to link one or more person entity records to the record of a specific evidence item. Here, investigators can associate a single evidence item with a person, such as a Subject, Witness, Victim, or Other. If a piece of evidence is collected in relation to a specific person, add this person under the **Persons** tab in the Evidence Record. A single evidence item may be associated with one or multiple entities, and can also be associated with one or multiple cases.

Locations

The Locations tab allows investigators to add or link locations to a specific piece of evidence.

Events

The Events tab allows investigators to link either incident or investigation event records to an evidence record. If a piece of evidence is collected in relation to a specific event, that event can be added under the Events tab in the Evidence Record.

Properties

The Property tab allows users to add or link property items to a specific piece of evidence. Users are able to add new properties, view existing ones linked with the case in a related tab or list, and edit them. If a piece of evidence is collected in relation to a specific property, that property can be added under the Properties tab in the Evidence Record. The vehicle index and firearm index tables are an extension of the property index table.

Vehicles

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The Vehicles tab allows an investigator to link one or more vehicle entity records to an evidence record. Each vehicle record profile stores critical identifiable information about a vehicle, and allows it to be associated with a specific piece of evidence. For example, if a piece of evidence was recovered from, or collected in relation to a specific vehicle, an entity record may be created for this vehicle, and it can then be linked to the Evidence record. The vehicle index and firearm index tables are an extension of the property index table.

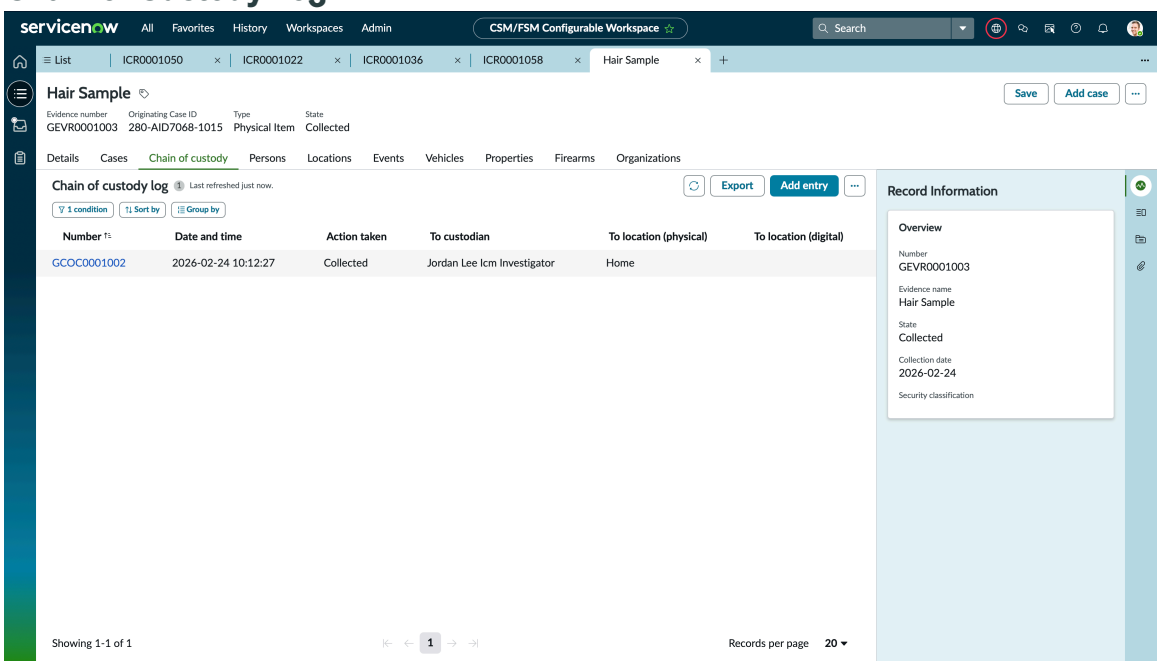
Firearms

The Firearms tab allows users to link one or more firearm entity records to an evidence record. Each firearm profile stores critical identifiers, traits, and historical data. The vehicle index and firearm index tables are an extension of the property index table.

Organizations

The Organization tab allows users to create and manage records of organizations that are related to the case. Users are able to add new organizations, view existing ones in a related tab or list, and edit details as they become available. If a piece of evidence is collected in relation to a specific organization, that organization should be added under the **Organizations** tab in the Evidence Record.

Chain of Custody Log



Track the movement, transfer, and status changes of evidence records with a dedicated digital Chain of Custody (CoC) log tab, featuring audit logging, timestamps, and information about responsible personnel for each action. Investigators can create entries of custody events, and include information such as the sender, receiver, timestamp, and purpose, which can be especially useful for internal investigations (e.g., OIGs, compliance offices, HR) and offices with multiple investigative departments working with a single set of evidence. A document upload or signature capture within the custody record can also be configured by an admin.

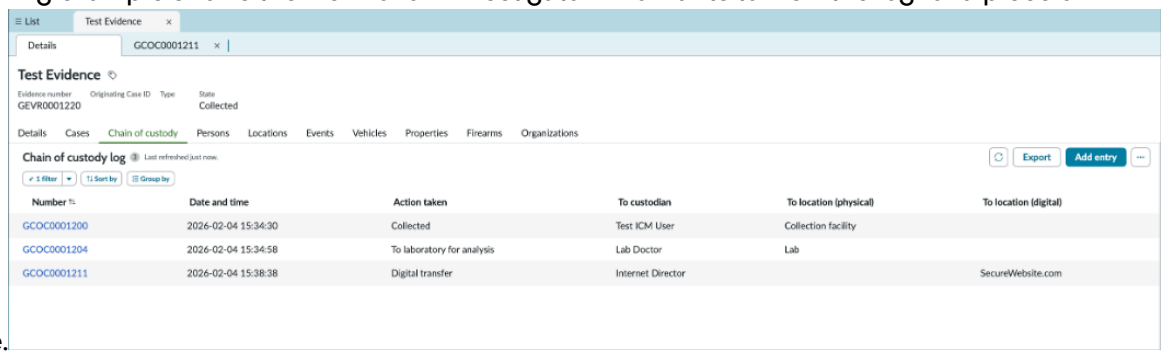
In the Investigative Case Management application, a Chain of Custody record answers:

- The action(s) taken on the evidence
- When this action took place, and by whom
- Where the evidence had been collected from, and from whom

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- The method of transfer from one location and person to another
- Where it physically and/or digitally resides

The following example shows the view for an investigator who wants to view the log for a piece of evidence.



For information on how to create a chain of custody log in Evidence Management, see Create a chain of custody log for an evidence record in an investigative case.

Add supporting evidence records to an investigative case

Add pieces of evidence that are related to an investigative case created in the Investigative Case Management application, whether physical or digital. Fill in information about evidence location, and create a chain of custody log to keep track of evidence if or when it is transferred or moved.

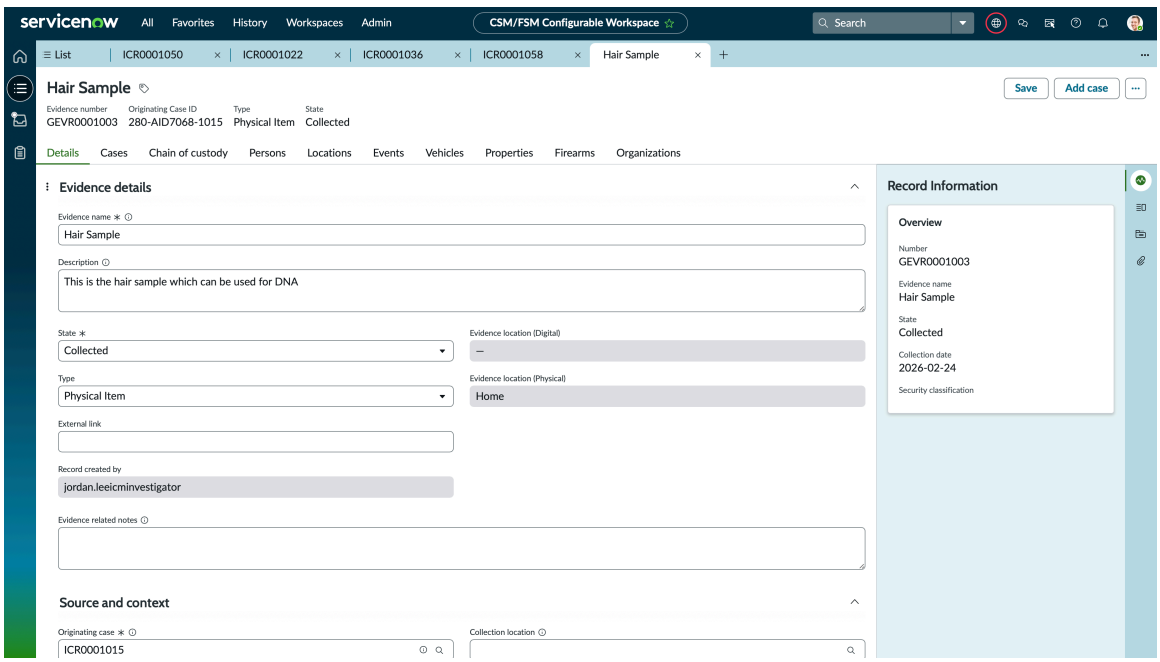
Before you begin

Role required: icm.investigator, supervisory_agent, admin

About this task

With Investigative Case Management Evidence Management, investigators can upload or log new evidence (physical or digital, such as documents, images, or physical items), map it to the investigation, and assign it to a subject, event, location entity. They can also then track the movement, transfer, and status changes of evidence records with timestamps and responsible personnel for each action with the digital chain of custody feature.

The following example shows the Details tab of an evidence record.



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Procedure

1. Navigate to the CRM Workspace and select **My active cases**.
   Alternatively, you can select a case using the CRM Workspace Lists menu by selecting **Lists** > **Investigative Cases** > **All** and selecting the case.
2. Select the case you wish to add evidence to.
3. Select the **Evidence** tab.
4. Select **Add New**.
5. On the form, fill in the fields with information about the evidence.
   For more information about the information collected in this form, see Investigative Case Management Evidence Management Evidence form fields.
6. Select **Save**.

Result

The evidence record has now been created and associated with the open investigative case. You can associate any number of existing case entities to the evidence record for record-keeping. For information on linking entities to evidence records, see Associate and link evidence to entities.

What to do next

You can create a chain of custody log within the workspace to keep track of evidence if or when it is transferred or moved. For information on creating a chain of custody log, see Create a chain of custody log for an evidence record in an investigative case.

Create a chain of custody log for an evidence record in an investigative case

As an investigator or supervisory agent, you can create a Chain of Custody (CoC) log within the workspace to keep track of evidence if or when it is transferred or moved.

Before you begin

Role required: icm.investigator, supervisory_agent, admin

Note: The ability to create a Chain of Custody Log for an evidence record is strictly tied to write access for that evidence record. If the particular user does not have write access to the open evidence record, they will not be able to create a record. For more information on modifying the security classification for an evidence record or for a case, see .

About this task

With Investigative Case Management Evidence Management, investigators can create a chain of custody log within the workspace. The log tracks the movement, transfer, and status changes of evidence records associated with the case. Audit logging captures timestamps and responsible personnel for each action, including when and by whom evidence was opened and viewed.

Note: A Chain of Custody Log cannot be created if the evidence record is in Draft state.

The Chain of Custody Log form collects the following information about a piece of evidence:

Chain of Custody Log form

Fields	Description
From custodian	The custodian that the evidence was transferred from. Filled in by default.
	Method used to transfer custody of evidence from one individual to another. If this is the first

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Chain of Custody Log form (continued)

Fields	Description
	time this piece of evidence is being received or handled, select **Initial Receipt**. Otherwise, the method of transfer may be: • In-person • Secure upload • Courier • Email
	The date and time of the transfer. You may enter a past, present, or future date.
	The action taken on the evidence. The evidence may have been taken: • To laboratory for analysis • To court for trial/proceeding • To storage/vault • To case agent or investigator • For review or inspection • To case agent or investigator • For review or inspection • Collected • Return from court • Inter-agency transfer • Disposal • Return to owner • Digital transfer • Returned from laboratory • Temporary custody assignment
Custodian type	Whether the receiving custodian is an internal user with a user record in the instance, or external.
To Custodian	The custodian's name. If internal, a user record reference. If external, a string.
Location type	Indicates whether the evidence is changing physical location, digital location, or both.
From location	Location the evidence is being transferred from. Filled in by default.
To location	Location the evidence is being transferred to. Changing the location within the Chain of

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Chain of Custody Log form (continued)

Fields	Description
	Custody log will change the physical/digital location in the evidence record at large.

Procedure

1. Navigate to the CRM Workspace and select **My active cases**.
   Alternatively, you can select a case using the CRM Workspace Lists menu by selecting **Lists** > **Investigative Cases** > **All** and selecting the case.
2. Select the case you wish to add a chain of custody log to.
3. Select the **Chain of Custody** tab.
4. Select **Add Entry**.
5. On the form, fill in the fields with details about the evidence interaction.
6. Enter the method of transfer.
7. Enter the date and time during which the evidence was handled.
8. Select the action that was taken with the evidence from the dropdown menu.
9. Enter any notes.
10. Add any attachments.
    Attachments can be deleted or renamed until the chain of custody log is added to the evidence record. After the log is added, the user can add attachments but not delete or rename existing ones. Work notes can be added in the activity stream after creating the log.
11. Select the checkbox to affirm that you have complied with all evidence handling requirements, and enter your signature.
    You can type or draw your signature. The signature image is saved as an attachment to the log.
12. Select **Create Entry**.

Result

A Chain of Custody log is now started, and a new entry can be added every time a piece of evidence is moved, handled, or otherwise interacted with. To create a log entry, select **Add Entry** on the Chain of Custody record page. Select the log number to view the details of a CoC log entry.

Note: The Chain of Custody log record becomes read only after it is created. Existing Chain of Custody log records can only be modified by an admin.

Associate and link evidence to entities

Link associated evidence records to other entities within a case created in the Investigative Case Management application workspace. All evidence records available in the master index can be linked to an entity.

Before you begin

Role required: icm.investigator, supervisory_agent, admin

With ICM Evidence Management, investigators can create and associate the record for an item of evidence to other entities within the case, all from one workspace.

Before you can link an entity to an evidence record, make sure an entity record has been created for it **within** the case. For more information on how to create an entity record for a related

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person, property, vehicle, or other entity and associate it with the case, see Add entities to an investigative case using Investigative Case Management Entity Management.

Procedure

1. Navigate to the CRM Workspace and select **My active cases**.
   Alternatively, you can select a case using the CRM Workspace Lists menu by selecting **Lists** > **Investigative Cases** > **All** and selecting the case.
2. Select the **Evidence** tab.
3. Within the Evidence record, select the tab that contains the entity you wish to associate with the open evidence record.
   This can be a vehicle, person, organization, firearm, property, location, or event.
4. Select the plus icon to add the entity to the evidence record.
   In this view, you can see all of the entities that this evidence record has been associated with, in each tab.
5. Select the existing entity from the dropdown menu.
   If the entity does not appear in the dropdown, verify that it has been created within the open case.
6. Select the related case.
   Here, choose the case that is linked to this entity. If the case you need isn't listed, make sure it's linked to the chosen entity.
7. Select the relationship type.
   The choices displayed here vary based on what two types of entities you are trying to link. If you are trying to link evidence to a location, for example, that location can be the crime scene, OR that evidence can either:
   - Have been found at that location
   - Be related in some way to a witness of the incident.
8. Provide a brief description of the relationship between the entity and evidence.
9. Select **Save** to link the open evidence record to the selected entity.
10. Select the pencil icon next to the entity to edit the record.
    In this view, you can see all of the entities that this entity has already been associated with.
11. Select **Link Associated Entity**.
12. Select the entity type from the dropdown menu.
13. Select the existing entity from the dropdown menu.
    If the entity does not appear in the dropdown, verify that it has been created within the open case.
14. Select the relationship type.
    The choices displayed here vary based on what two types of entities you are trying to link. If you are trying to link a person to a location, for example, the person can either:
    - Have witnessed an event at that location
    - Resides at that location
    - Works at that location
    - Experienced an incident or event at that location
15. Select **Save** to link the open entity to the selected one.
    The entity has now been associated with the evidence record.

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Configure the security classification of an evidence record in Investigative Case Management

You can change and configure the security classification of an evidence record for labeling purposes.

Before you begin

Role required: icm.investigator, supervisory_agent, admin

About this task

Note: A user without write access to evidence cannot create a Chain of Custody log.

Investigative Case Management Evidence Management allows investigators and supervisory agents to delegate access to individual evidence items. An evidence record can have the following security classifications:

Evidence Management Security Classifications

Classification	Access Level
Public	
Internal Use Only	
Confidential	• Investigator assigned to the case • Supervisory Agent • Special Agent in Charge
Restricted	• Investigator assigned to the case • Supervisory Agent • Special Agent in Charge
Law enforcement sensitive (LES)	
Privileged	
Personally Identifiable Information (PII)	
Protected Health Information (PHI)	
Classified Confidential	Special Agent in Charge
Classified Secret	Special Agent in Charge
Classified Top Secret	Special Agent in Charge
For Official Use Only (FOUO)	
Evidence Under Seal	Admin

.

Procedure

1. Navigate to the CRM Workspace and select **My active cases**.
   Alternatively, you can select a case using the CRM Workspace Lists menu by selecting **Lists** > **Investigative Cases** > **All** and selecting the case.
2. Select the case you wish to update the evidence security classification for.
   You can only edit the security classification for one evidence record at a time.

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3. Select the **Evidence** tab, and select the evidence record you wish to update the evidence security classification for.
4. In the **Security Classification** dropdown, select one of the following:
   - Public
   - Internal Use Only
   - Confidential
   - Restricted
   - Law enforcement sensitive (LES)
   - Privileged
   - Personally Identifiable Information (PII)
   - Protected Health Information (PHI)
   - Classified Confidential
   - Classified Secret
   - Classified Top Secret
   - For Official Use Only (FOUO)
   - Evidence Under Seal
5. Select whether or not you need to restrict access to the evidence record.
6. Select **Save**.

Using Grants Management

Use Grants Management for Public Sector Digital Services to set up and award grants, and screen proposals for them.

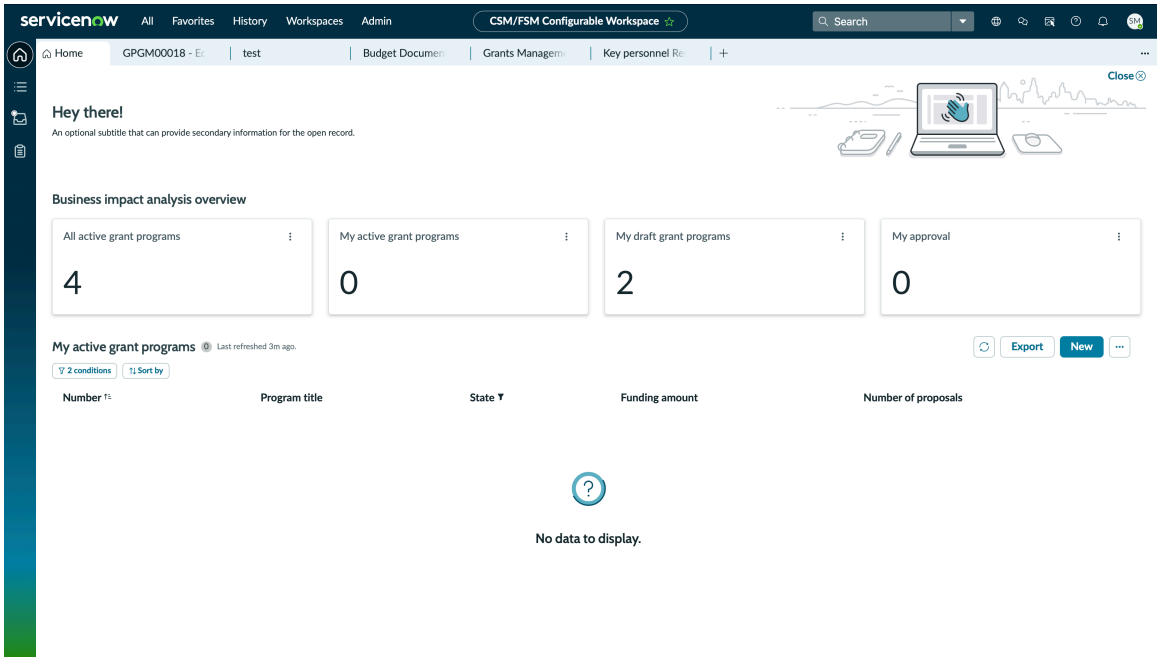
The Grants Application Workflow in the Public Sector Digital Services (PSDS) Grants Management Playbook provides a structured process for managing grant applications from submission for the pre-award phase. It begins with application intake, where applicants submit required forms and eligibility is verified. The review and evaluation phase involves initial screening, technical assessments, and scoring to determine funding recommendations. Once selections are made, agencies proceed with award decisions and notifications, followed by grant agreement execution, where terms, reporting requirements, and disbursement schedules are established. Grants are financial funding provided to individuals or organizations for a particular purpose, usually to fund initiatives that serve the public good.

Grants Management Landing Page

The Grants Management experience begins on the Grants Management landing page for grants agents and grants program managers. Grants organizations may customize their landing pages with branding colors or other display changes, but the components may remain the same.

The following is an example of how the default landing page appears in the CRM Workspace Grants Management workspace for a grant agents or grant program manager.

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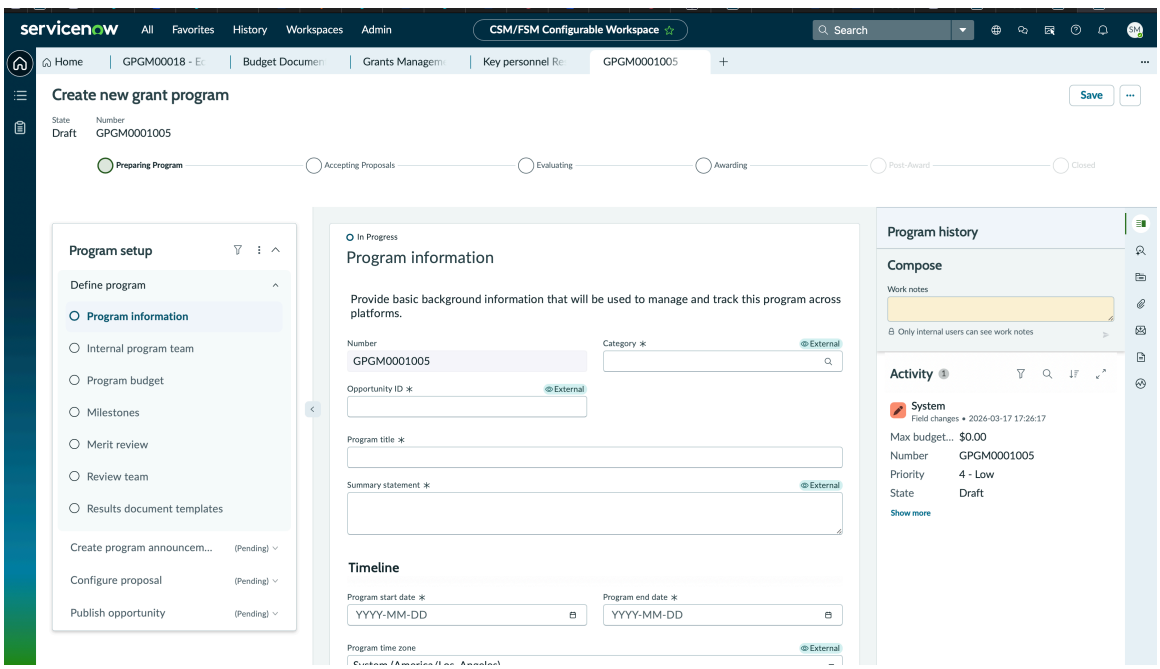


Here, you can see your workload at a glance, showing active cases, shared cases, upcoming deadlines and events, recent activity, and pending tasks. You can customize this view to your preferences, sorting cases and tasks with custom filters. You can create a grant program directly from this view, or you can navigate to the Lists menu to create it from there.

Grants Management Program Setup Playbook

This is the first step in creating a grant program for applicants to submit to.

The process begins with program definition, where agencies establish milestones, internal program team members, eligibility criteria, budgets, and key performance metrics. Next, agencies configure the application process, defining required forms, terms and conditions, required budget categories, and review teams. Once the grant program is configured, it is reviewed, approved, and then published.



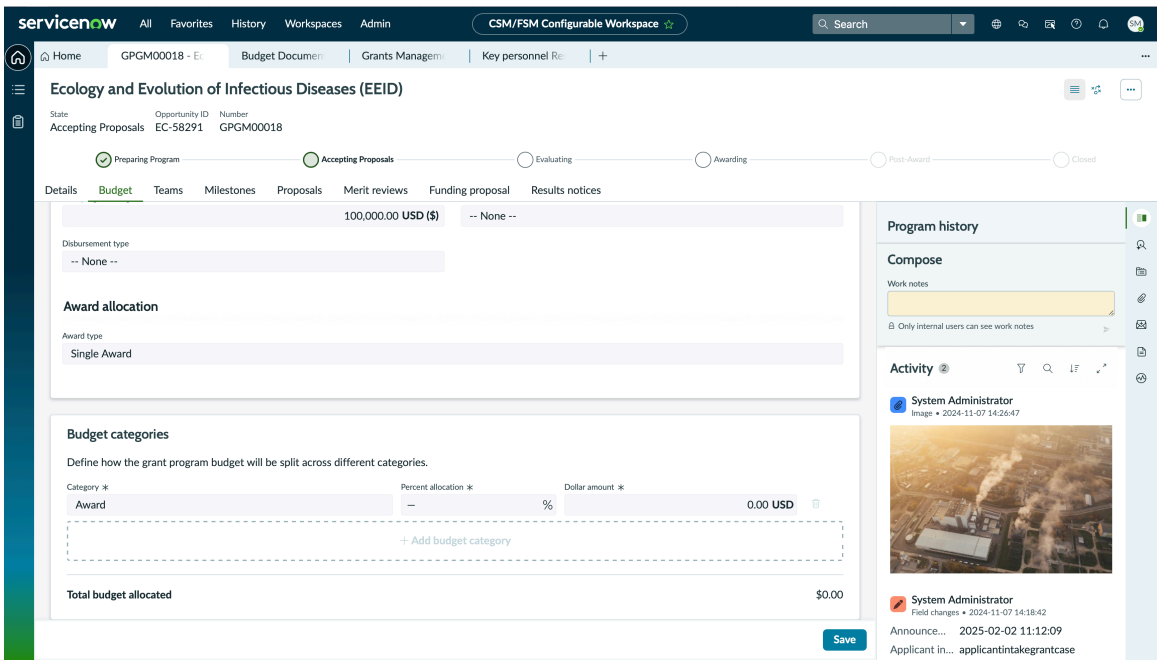
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This playbook contains four stages, and several activities in each stage. It guides the program manager through the process of creating a grants program. The process includes defining key details, creating the announcement, defining budget and milestones, defining eligibility, and publishing it to the agency's Grants Management Portal. For more information on using the PSP to create a GP, see Using the Grant Program Setup Playbook in Grants Management.

Once you create a Grant program and publish it using the Program Setup Playbook, you can view the details on the program information record page.

Grants Management Program Record page

After grant program set-up is complete, you can see every case detail (narrative, evidence, entities, tasks, and case team) organized into a single grant program record. This view is available even before you publish the opportunity to the portal for applicants to submit. After you publish the opportunity, the state displays as **Accepting Proposals** in this view. You can see all active proposals for the grant program by selecting the **Proposal** tab, and edit some program details by selecting the corresponding tabs.

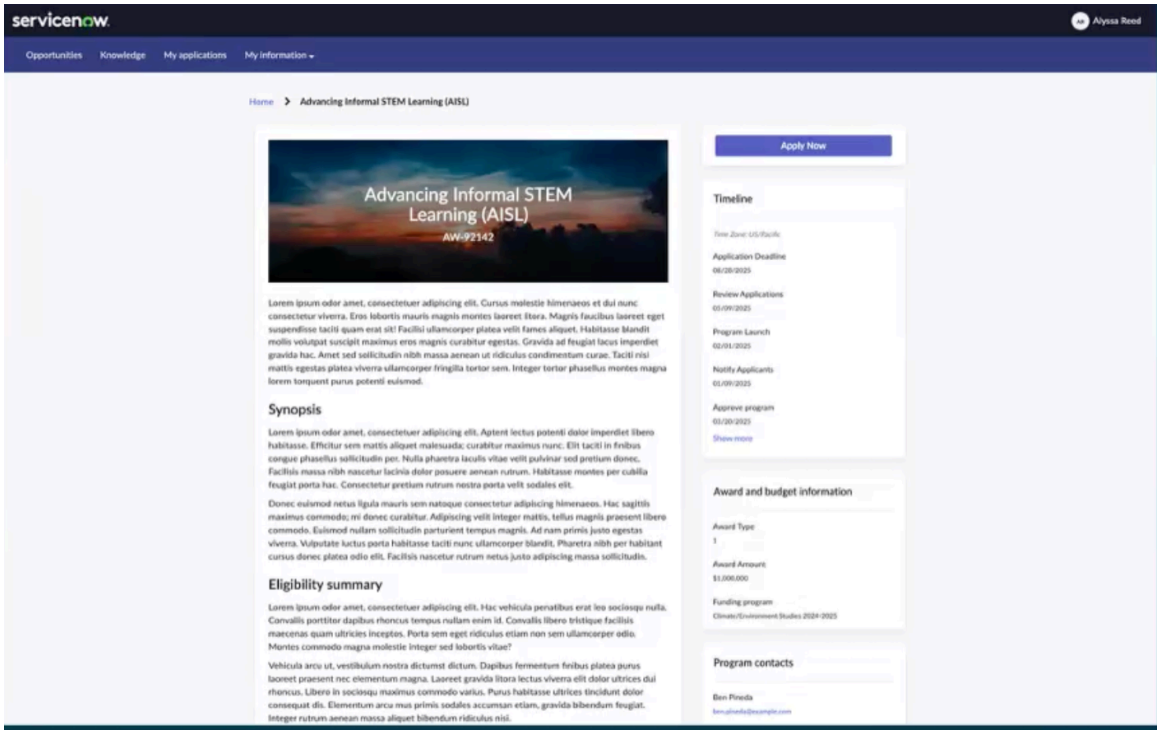


For grants managers and agents, the grants program information record page aims to be a one-stop shop. For more information on configuring the page collection, see Configure grants program record tabs in Grants Proposal Playbook

Grants Management Application Intake

For applicants, the application intake experience happens entirely on the Grants Management Portal, separate from the grants program manager/agent view. This feature improves self-service with a Grants Management Portal that simplifies finding, applying for, and tracking grants. Reduce applicant effort with guided intake, including save, resume, and export functionality . Increase agent productivity with tools to make screening submissions easy. This is where applicants will submit proposals for a grant program that was published by a grants program manager using the setup step. They can then be screened in the agent portion of the intake and screening feature. With a guided intake setup, including save, resume, and export functionality, Grants Management Intake aims to simplify the process of finding, applying for, and tracking grants for applicants.

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An applicant submitting a proposal is the first stage of the grants proposal playbook. The playbook is in the screen stage by the time it arrives to the agent. An agent cannot submit an application on behalf of an agent.

For more information on how applicants can use the Grants Management to view grants opportunities, submit applications, and view results, see Using the Grants Management Portal.

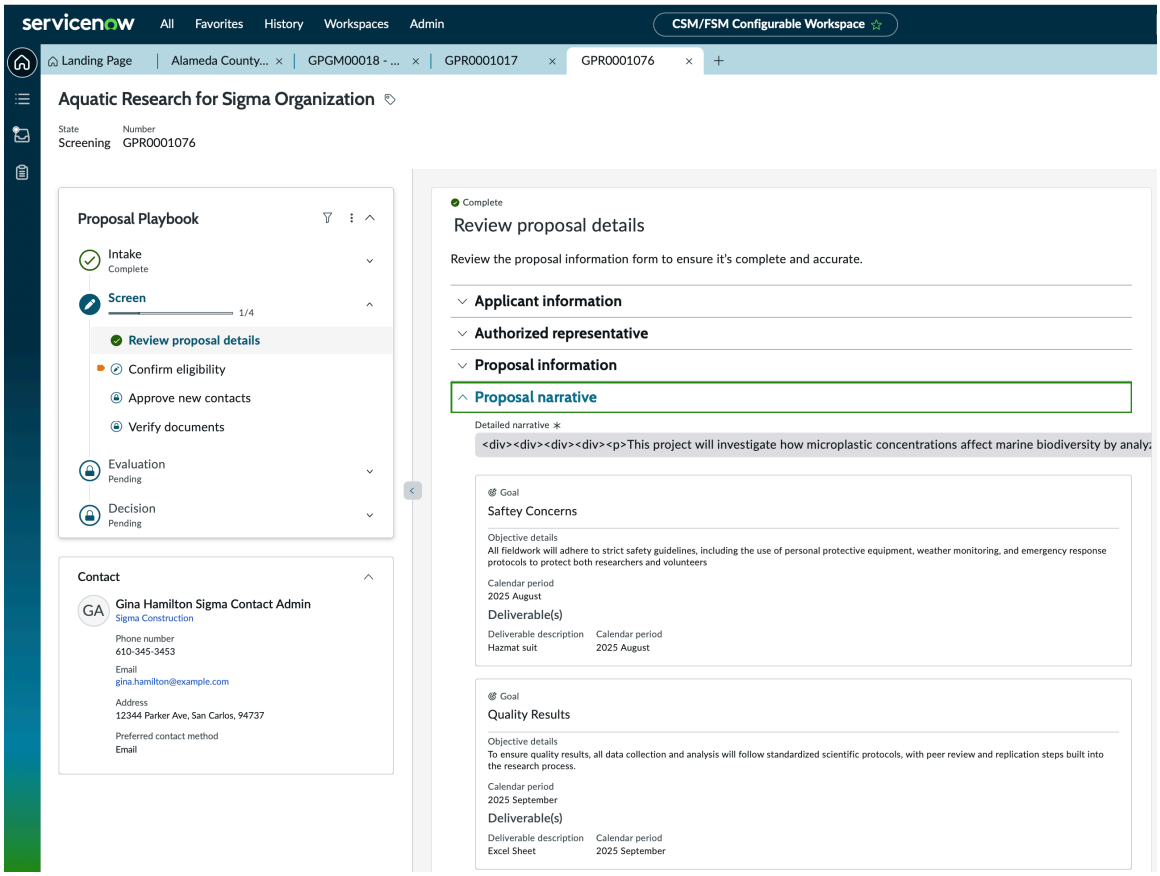
Grants Management Application Screening

For grants program managers (case agents) and directors, the application screening feature provides visibility across all proposal and submission details related to the grant program, once an applicant submits a proposal for an active grant program created by the grant program manager. Tools for agents to streamline the screening of submissions. The Grants Proposal Workflow in Public Sector Digital Services Grants Management provides a structured process for managing grant proposals from submission for the pre-award phase.

Using the Grants Management Screening feature, managers can:

- Review the proposal
- Confirm eligibility
- Approve new contacts
- Verifying documents submitted by the applicants

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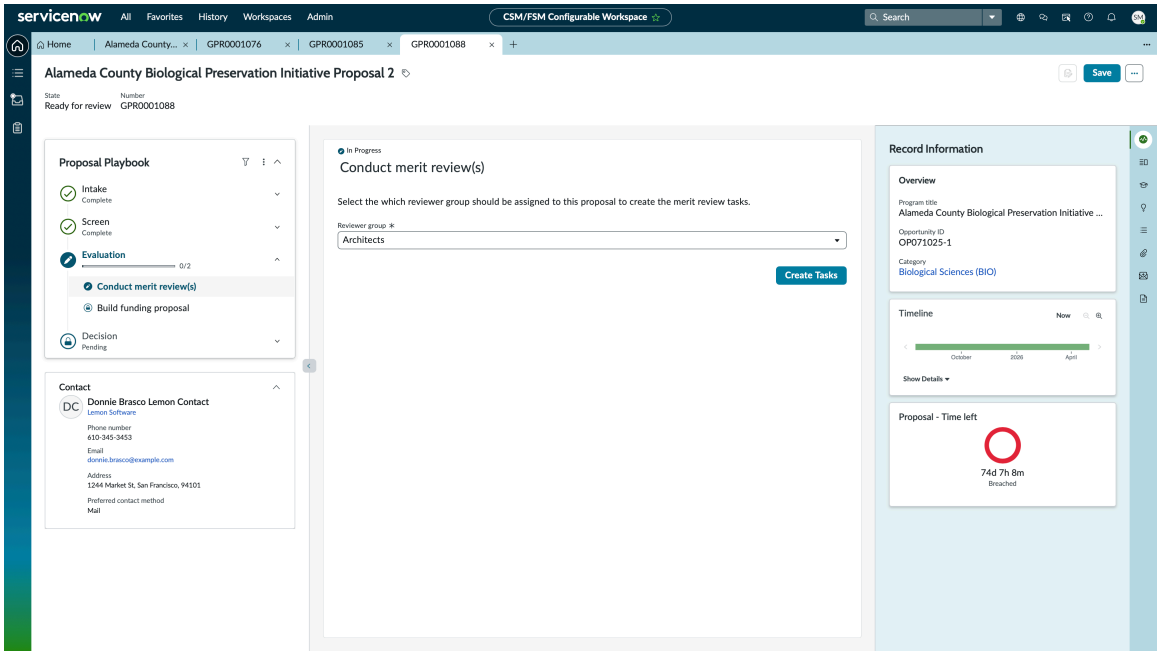


For more information on how grants managers can use the Application Screening feature, and Screen a grant proposal in the Grants Proposal Playbook.

Grants Management Application Evaluation

Grant proposals that pass the screening stage enter the evaluation phase, where the grants program manager creates and assigns proposal evaluation tasks to a group of external evaluators known as merit reviewers. Once all evaluation tasks are completed, the application is ready for the funding proposal phase, where certain grant applications will be selected for approval.

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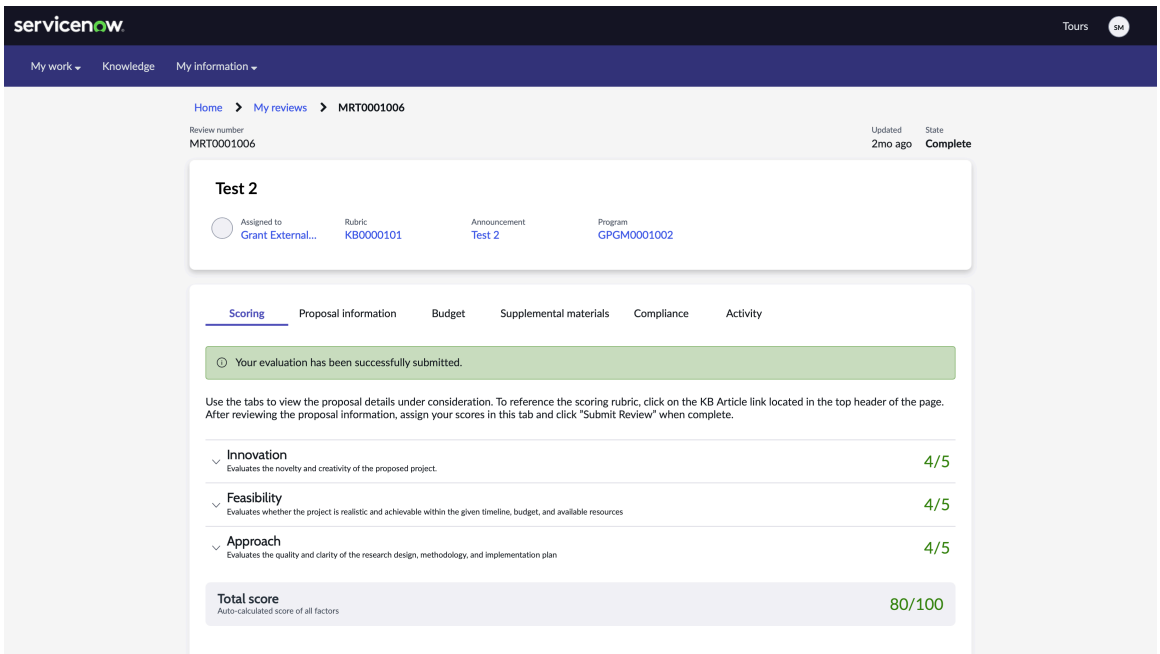


The funding proposal workflow involves the assessment of the evaluations conducted by the merit reviewers, and the definition of a proposal which will be sent to the Grant Program Director (GPD) for final approval. The funding proposal contains the individual grant applications which the grants program manager has selected for approval, and the proposed award amount for each.

Note: A grants program director can only approve or decline the entire funding proposal, not the individual grant proposals (applications) contained within it. A decline involves the creation of a new funding proposal which must be submitted again for approval.

Grants Management Merit Review

For external reviewers, the Merit Review experience happens on the reviewer service portal, separate from the grants program manager/agent view. This allows external reviewers to review and score proposals, all within a dedicated portal.

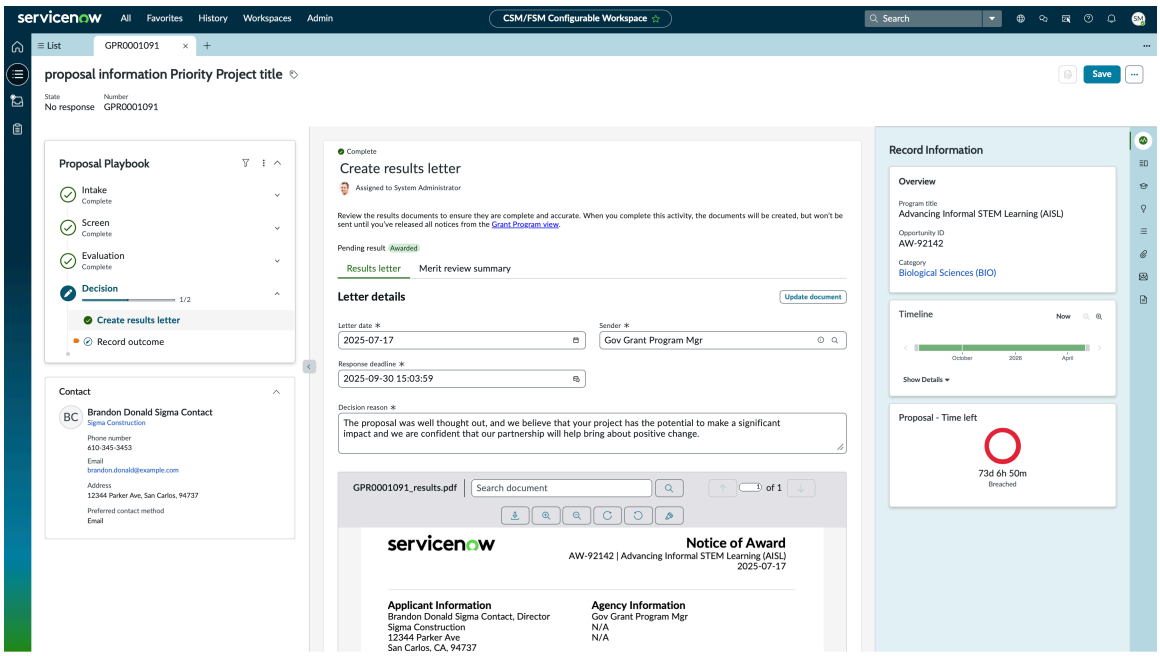


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For more information on using the Reviewer Service Portal as an external merit reviewer, see Using the Reviewer Service Portal.

Grants Management Application Decision

The final stage of the workflow is the decision phase. Based on the funding decisions made by the Grant Program Management team, a corresponding result letter is generated for each application. When all result letters across all applications are prepared, they are released, and the process awaits the acceptance of the outcome by the respective applicants. Applicants can access the results letter on the portal and either acknowledge or decline the award, and managers can capture the outcome of the proposal and close the record.



Using the Grant Program Setup Playbook in Grants Management

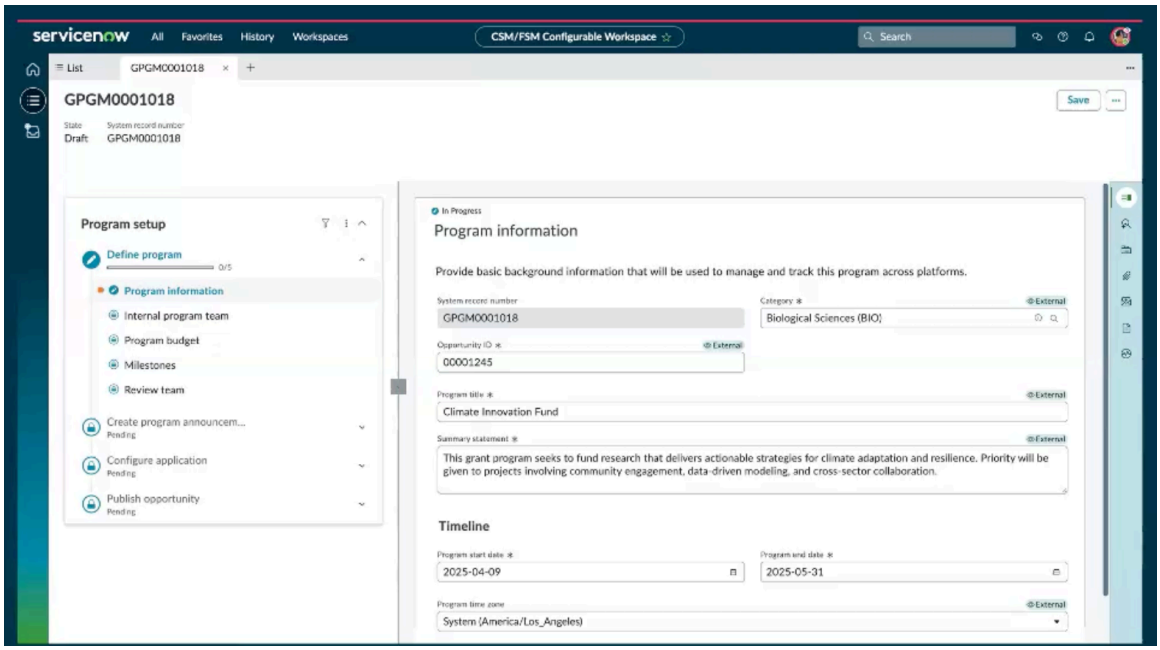
Design and configure a grant program before accepting applications from applicants or their liaisons. With Grants Management Program Setup, agencies can establish milestones, internal program team members, eligibility criteria, budgets, and key performance metrics, and grants program managers et up and manage grant programs with guided steps, defining merit review due dates, review framework, scoring rubric, and internal review teams.

Grants Management is a packaged application, with playbooks and workflows built in to support an agency's grant portfolio at multiple levels. The grants workflow is split into two parts: Grants Management Program Set Up, and Grants Management Application Intake and Screening.

The Grant Program Set-Up workflow is designed to support the comprehensive process of establishing a Grant Program. This workflow is divided into four distinct stages, each intended to guide the Grant Program Manager through both internal and external program configuration requirements.

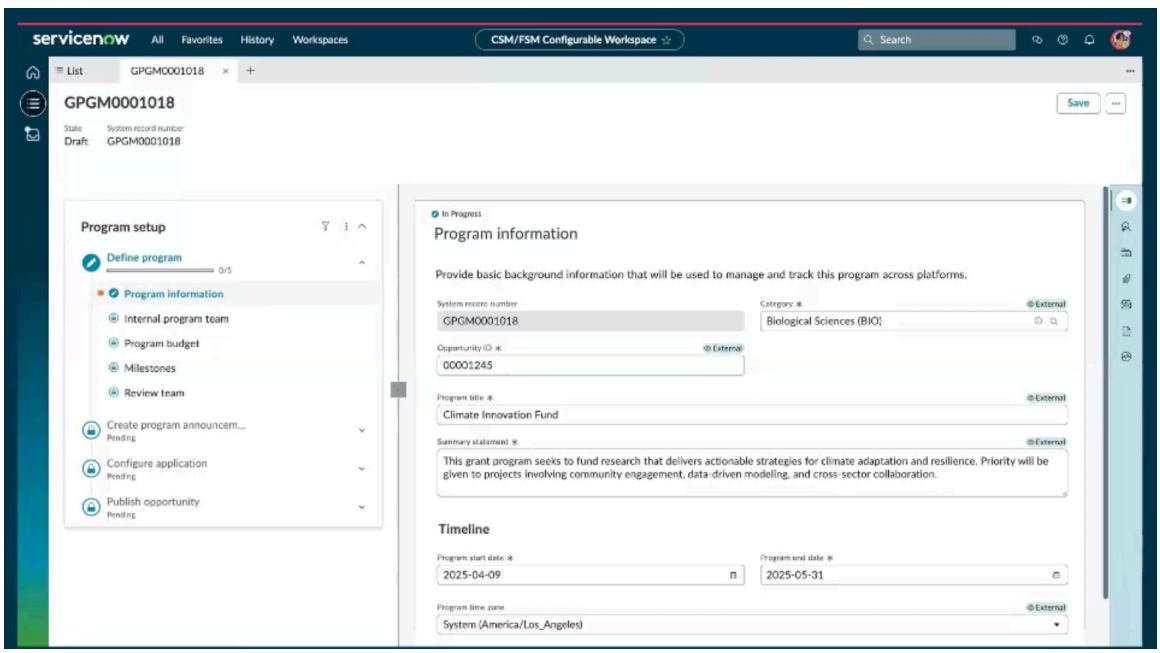
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Define Program



The initial stage, Define Program, enables multiple activities to be conducted simultaneously, streamlining the process of establishing program parameters. Key tasks during this phase include setting internal timelines, determining the program budget, identifying milestones, selecting merit review frameworks, forming teams, and preparing letter templates. Implementors may also have additional steps unique to their organization's needs and can freely add, modify, or remove activities to ensure their Grant Programs are fully configured according to specific requirements.

Program Announcement

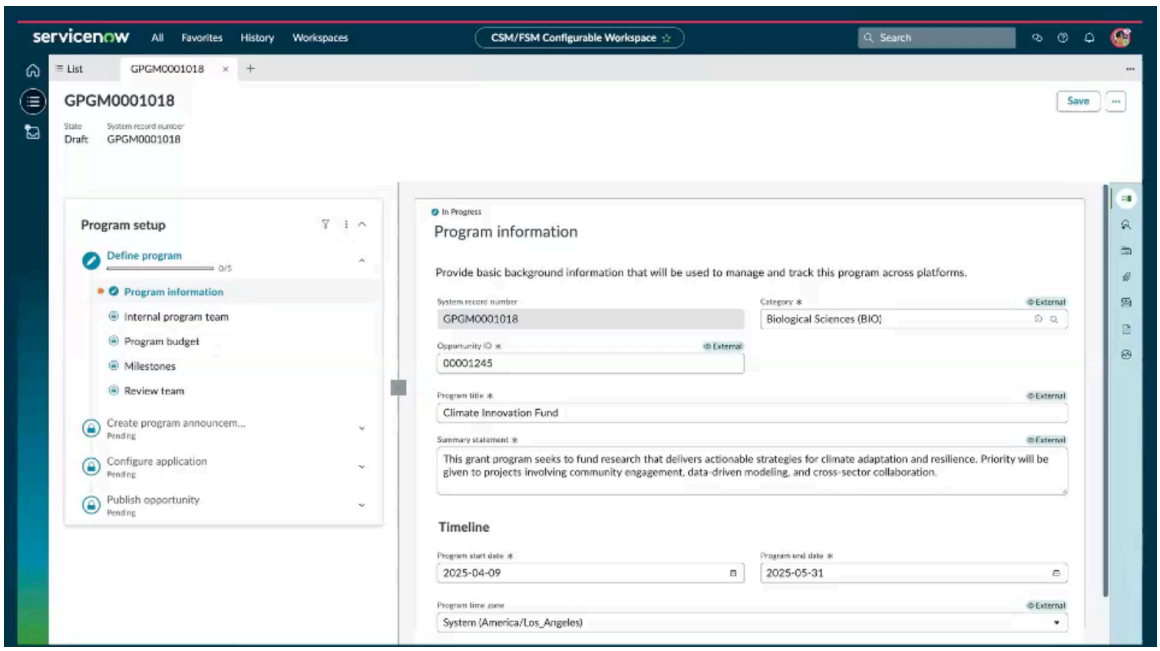


During the Program Announcement stage, all necessary configurations for the announcement page on the portal are completed. This involves entering essential details about the program, specifying points of contact, and providing relevant resources. The information configured in this

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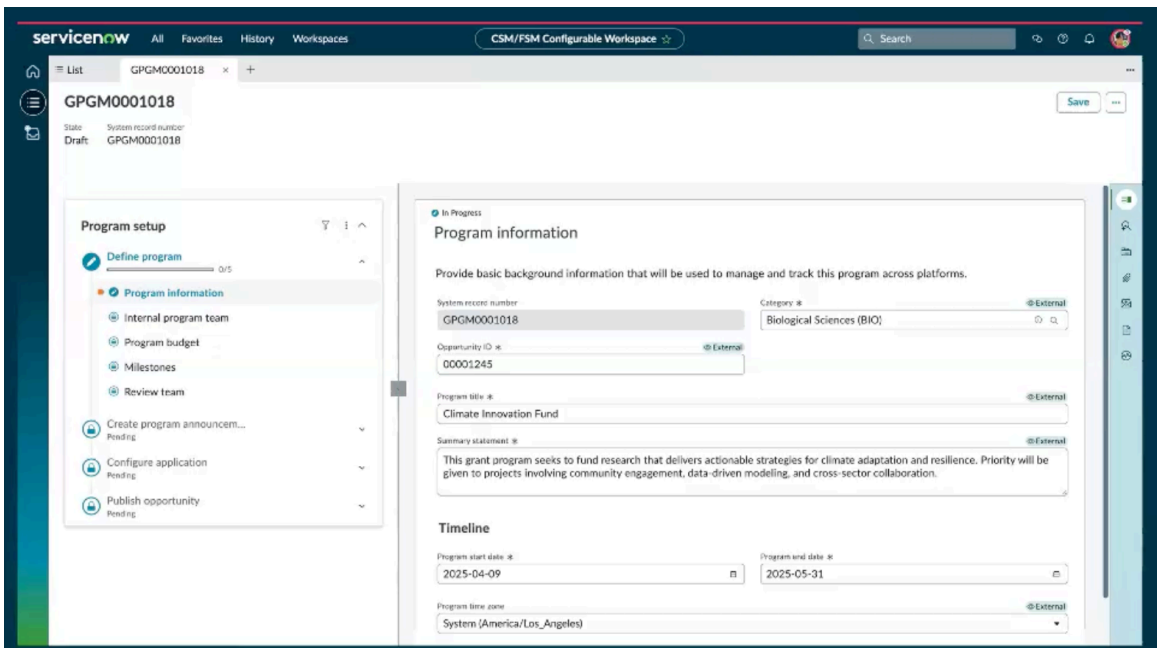
step becomes accessible to applicants when they view the catalog item for the Grant Program, ensuring transparency and clarity about the opportunity.

Configure Application



The Configure Application stage addresses the setup of application steps. Application requirements may vary depending on the individual Grant Program, so it is important to carefully define and configure elements such as the applicant information form, eligibility screening criteria, budget requirements, proposal narrative format and requirements, compliance mandates, and the terms and conditions to be presented for signature. Each Grant Program should tailor these configurations to align with its specific objectives and regulatory needs.

Publish Opportunity



The final stage, Publish Opportunity, involves a thorough review of all preceding setup steps. At this point, a preview of the program announcement is presented to the Grant Program Manager

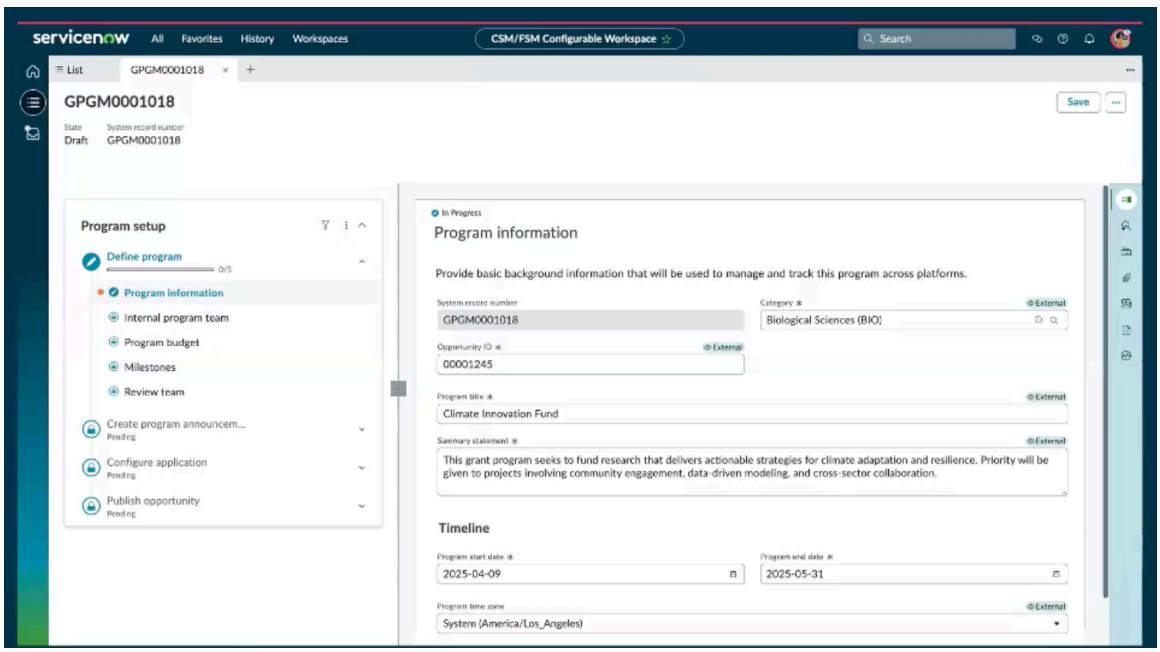
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for verification. Following the review, approval is requested from the Grant Program Director. Once approval is granted and all steps have been validated, the program can be published in accordance with the established timelines.

After the Grant Program is set up, Grant Program Managers can view the details of the program, including all submitted proposals, milestones, and merit reviews through the case record page. For more information on the case record page, see #unique_10_Connect_42_grant-program-record-tabs.

Set up a Grant Program in Grants Management

Design and configure a grant program before accepting applications from applicants or their liaisons. With Grants Management Program Setup, grants program managers can set up and manage grant programs with guided steps.



Define key details regarding the grant program. Agencies establish milestones, internal program team members, eligibility criteria, budgets, and key performance metrics. Grants program managers define merit review due dates, review framework, scoring rubric, and the internal review team.

Make it effortless for Grant Program Managers to create, publish and manage grant programs. Minimize errors with a guided process including built-in business logic. Protect sensitive information with role-based access management.

Grants Management is a packaged application, with playbooks and workflows built in to support an agency's grant portfolio at multiple levels.

The workflows for a type of case and the activities that you must complete to resolve these cases are outlined in the playbook. By using a playbook, you can visualize the entire life cycle of the Grants Management setup workflow.

A grant announcement is a formal solicitation issued by a funding organization. It details the objectives, eligibility criteria, funding amounts, and application procedures for a specific funding opportunity. Grants Management Program Setup Playbook walks grants program managers through the process of creating and building out a grant program announcement.

Grants Management Program Set Up allows you to set up and manage grant programs with guided steps to create, publish, and, manage different grant programs under your agency, making sure to protect sensitive information with role-based access management.

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Like other Public Sector Digital Services playbooks, this playbook contains four stages, and several activities in each stage. However, since this playbook is designed specifically for grant program managers create net new grant programs, it guides the program manager through the process of creating a grants program, from defining key details, to defining budget and milestones, to publishing it to the agency's Grants Portal.

Each grant program creates a product model record.

Grants Management Program Setup stages are listed in the following table.

Playbook stages

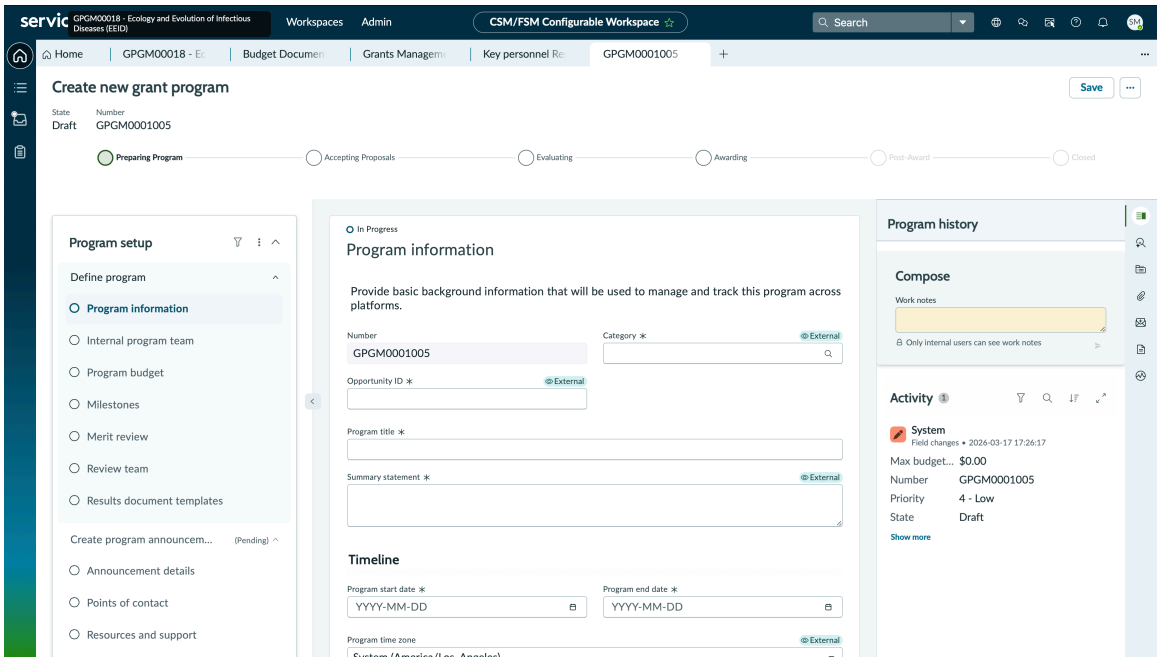
Task	Description
Define program	Define key details regarding the grant program. Agencies link the grant program to a funding program, establish milestones, internal program team members, eligibility criteria, budgets, and key performance metrics. Grants program managers define merit review due dates, review framework, scoring rubric, and the internal review team.
Create program announcement	Build the program announcement. Define the required forms, terms and conditions, required budget categories, and external-facing point of contact. Provides you with an opportunity to review the grant details.
Configure application	A grants program manager puts together an application, which includes eligibility and screening criteria, the collection of applicant information data, budget limitations, and other crucial information.
Publish opportunity	Define announcement removal and proposal close dates and publish the program announcement to the Grants Management Portal.

Create a grant program for Public Sector Digital Services

Use the Public Sector Digital Services Grants Management program setup to either create a grant program, or create one from an existing configuration.

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About this task



Before you begin

Role required: sn_svc_appl_pgm_mg.grant_program_manager

Procedure

1. Navigate to **All** > *`Public Sector Workspace`*.
2. Navigate to **Lists** > **Grant Programs** > **All** and select **New**.
   Here, you have the option to create a program from the default template, or start by copying data and configurations from an existing grant program.
   - To create a grant program without using any pre-existing configurations, choose **New**.
   - To copy data and configurations from a pre-existing grant program, choose **Create a new program from an existing program**. Choose the existing grant program from the drop-down menu and select **Continue**.

     You can determine which fields are copied over to the new grant program record, as well as fields in related records, including default fields. You can add or remove fields.

   A new grant program is created within the Grant Program table (sn_svc_appl_pgm_mg_grant_program), and the playbook is moved to the **Define Program** stage. A product model record, service definition record, and draft playbook content item have been automatically created for the grant program.
3. Select **Save**.
4. On the **Grant Program** form, fill in the details of the grant program.

Grant program information form

Program information form fields	Description
Category	Category of the grant
Opportunity ID:	ID of the grant program
Program title:	Title of the grant program

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Program information form fields	Description
Summary statement:	A summary of the grant program to be displayed to applicants.
Program start date	The start date of the program. Present and future dates are allowed. **Note:** The two-digit year format (yy) isn't supported. Use the dd/mm/yyyy format.
Program end date	The end date of the program. Present and future dates are allowed.

5. Select **Mark Complete** to move to the next activity.

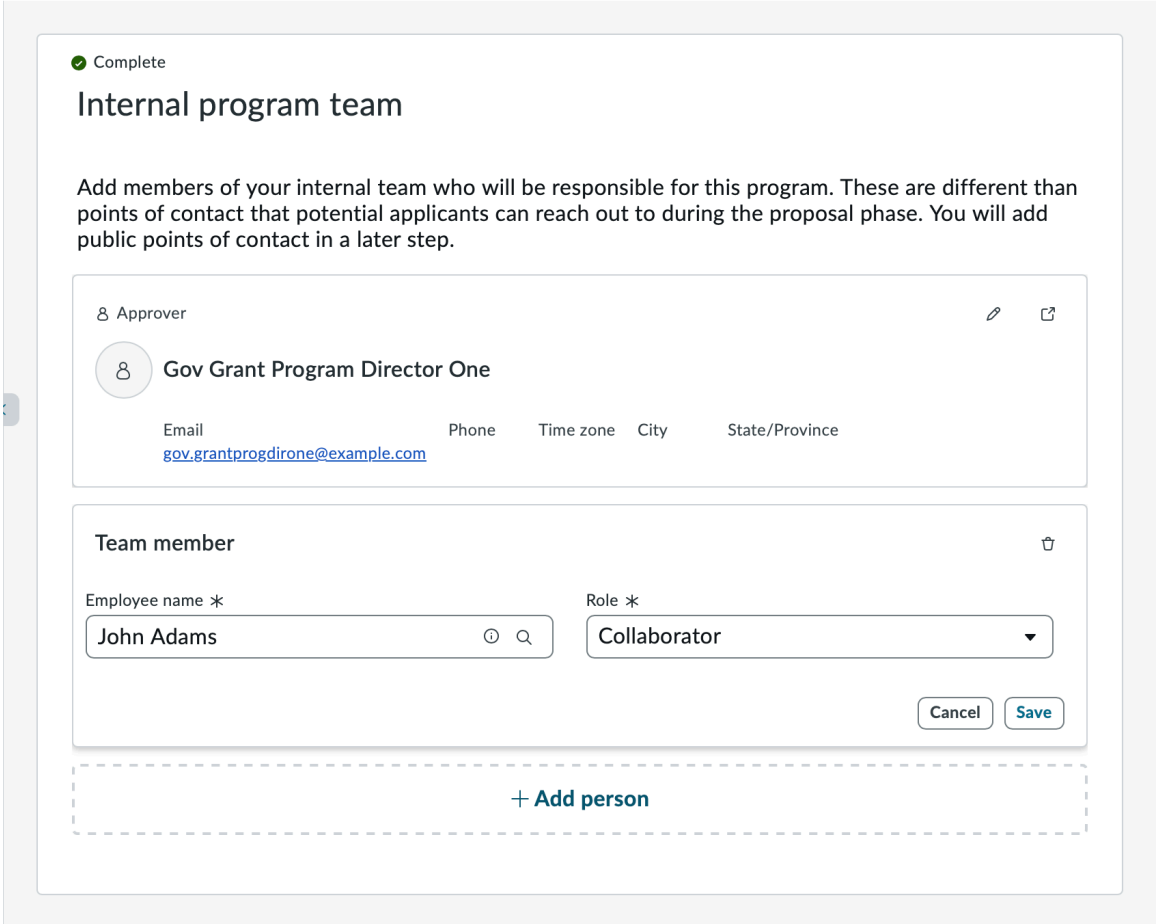
Add members to a Grant Program internal program team

Add members of the Internal Grant Program team who will be responsible for administering this program. Designate a program approver, lead and co-lead, collaborators, and observers.

About this task

The Internal Team plays a crucial role in supporting the Grant Program Manager throughout the lifecycle of the grant program. This group is responsible for assisting with the development and configuration of program parameters, managing internal processes, and ensuring that all compliance and operational requirements are met. Members collaborate to provide expertise across areas such as budgeting, timelines, proposal evaluations, and documentation, enabling a streamlined and transparent grant management process, and can be sub-classified as approver, observer, program lead, program co-lead, or other.

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These are different than points of contact that potential applicants can reach out to during the proposal phase.

To add public-facing points of contact that potential applicants can reach out to, see Add points of contact to a Grant Program.

Before you begin

Role required: sn_svc_appl_pgm_mg.grant_program_manager or sn_svc_appl_pgm_mg.grant_program_director

To add a user as an Internal Team Member, an Employee Profile must be created.

- Approvers review and decide on approvals triggered by the “Complete Approval” activity and “Funding Proposal” process. Each Grant Program can only have one approver. To add a user as an Approver, the user must have the following role: **sn_svc_appl_pgm_mg.grant_program_director**

Note: All Internal Team Members must have the pps_resource role; The pps_resource role is essential for users to be managed within the Strategic Portfolio Management (SPM) application. Only users assigned this role can be included in resource plans and capacity planning.

Procedure

1. Open the grant program record for which you want to configure the internal program team members.
2. Select the **Internal Program team** activity.

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3. In the **Employee name** field, enter the name of the employee you want to add as an internal program team member.
   These members are different than points of contact that potential applicants can reach out to during the grant proposal phase. You add public points of contact in a later step, using existing contacts from the **Employee name** drop-down list.

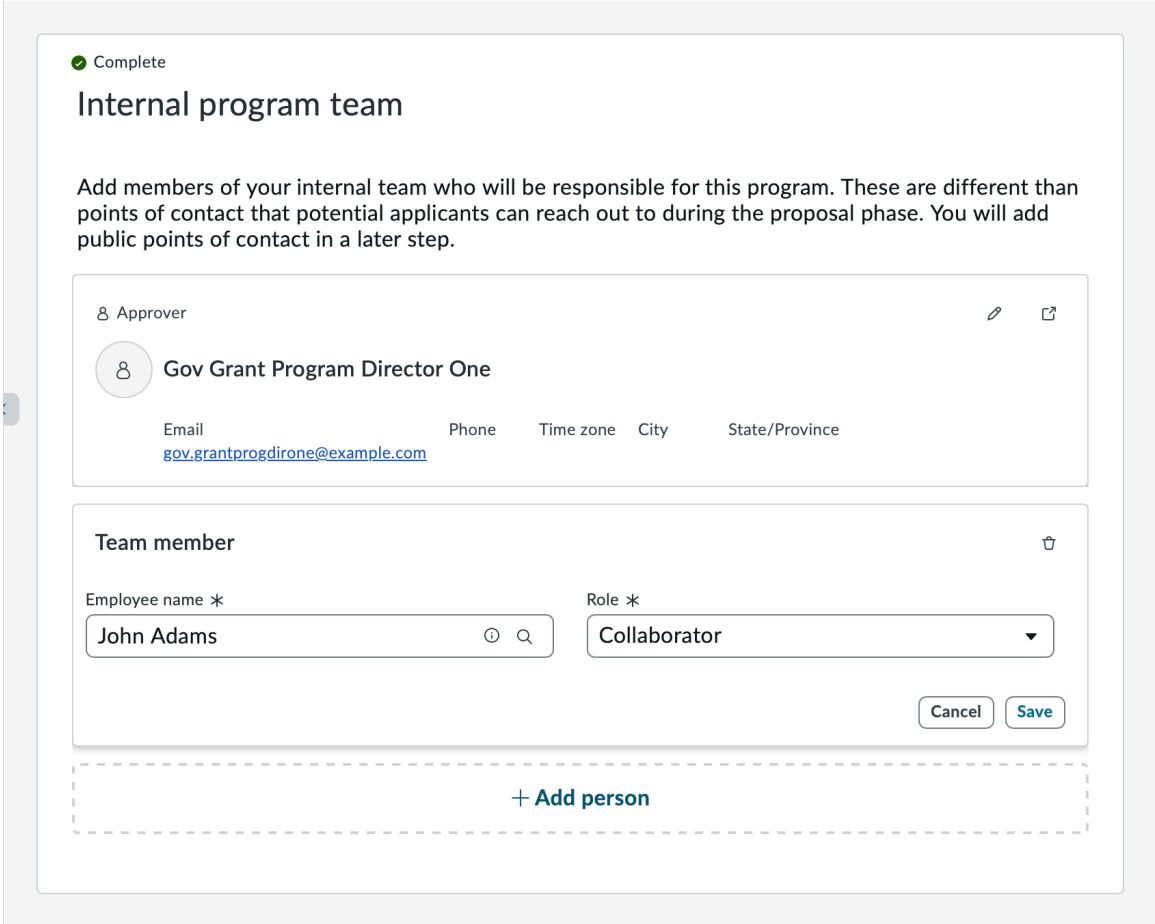
   Note:

   Only grant directors appear in the employee name.

4. Select the role responsibility that the user will play within the grant program.
   By default, you can assign the following role responsibilities to users within the internal program team. These internal team member personas have been identified as generic roles across government grant spaces. For more information on how to customize these, see Configure custom internal program team roles.

   To add members to this team, a user record must already have been created within the grants organization. This does not modify roles at a user level. For more information on user roles and responsibilities, see Assign user personas, roles, groups, and responsibilities in Grants Management.

5. Select **Save**.
6. Repeat these steps until you have added all the users and their respective responsibilities to the internal program team list.



7. Select **Mark Complete**.

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Result

Whenever a user is added in the **Internal Program Team activity**, a new record is created in the sn_plng_att_core_resource_assignment table with the user's name in the resource field, the selected role in the role field, and the grant program name in the planning item field. In the user_has_resource table, if a record for that user and role already exists, no new record is created; otherwise, a new record is added.

The internal program team for this grant program has now been established. In a later step, the user with the approver responsibility will approve the grant program when it needs to be published.

To verify the assignments of internal program team members, you can go to the sn_plng_att_core_resource_assignment table and verify the record. The "Planning Item" (planning_item) field should reference the Grant Program ID, and the "User" (user_resource) field should be populated as the user you are trying to add to the team. Every time a user is added as part of this activity, a record is created in the User Resource Role table for the specified role.

What to do next

Establish the Grant Program budget, budget categories, and more.

Configure custom internal program team roles

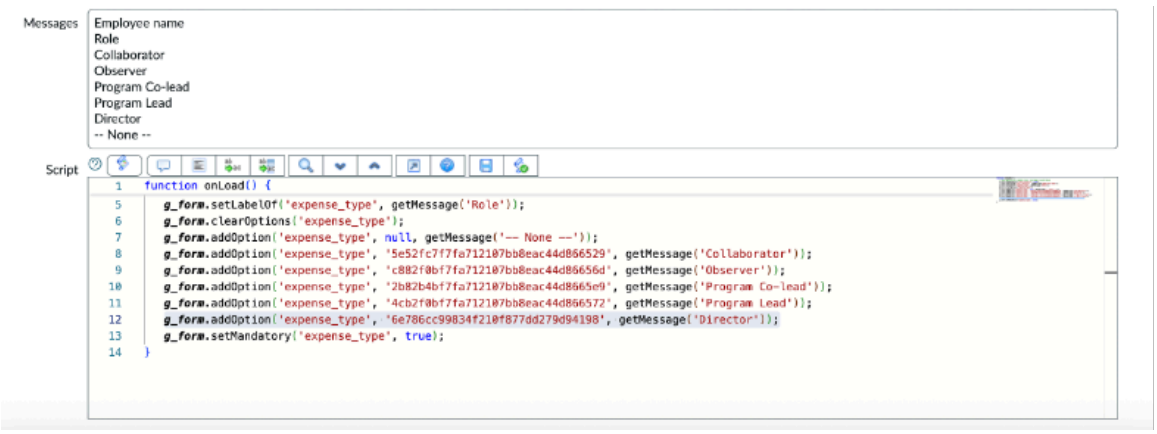
By default, five internal program team personas are included as part of the Grants Management application: Approver, Collaborator, Observer, Program Co-lead, and Program Lead. Set up new roles in the internal program team activity.

Before you begin

Role required: admin

Procedure

1. From the navigation menu, search and open **Resource Roles** and select **New**.
2. Enter the name of the internal program team role you want to add, specify the hourly rate, and select **Submit**.
3. From the navigation menu, search for and select **Client scripts**, and open the **NameRoleView Field labels/attributes** record.
4. In the **Messages** field, enter the name of the role that was added, and add a line in the script to include the option.



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Result

The new role will appear in the dropdown to be selected during the internal program team activity. To configure read/write access for these roles, see Configure read/write access roles for the Grants Management internal program team.

Configure the Grant program budget and award allocation

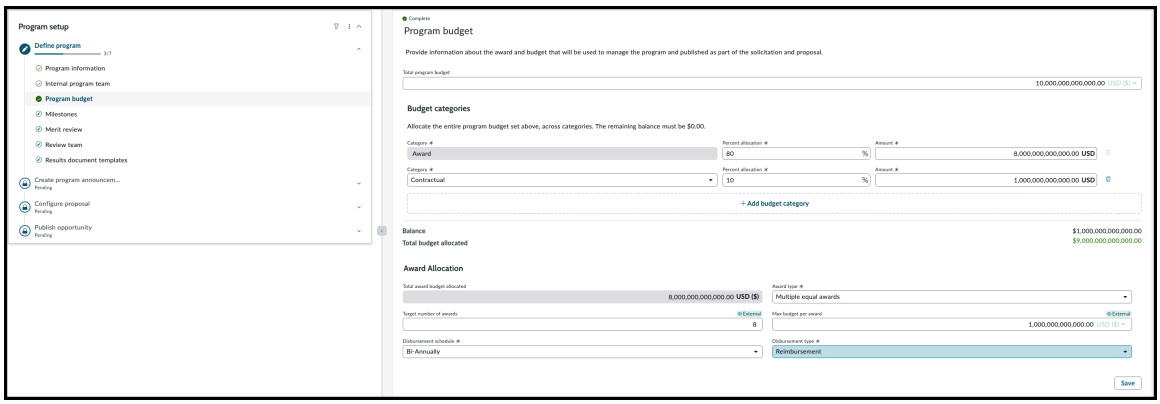
The program budget and award allocation step structures how Grant Program Managers define, categorize, and allocate the total program budget across budget categories and award types.

Program Budget overview

The Program Budget step in the Grants management Program setup playbook defines the total financial scope of a grant program. From Grants management version 1.41, this step is structured into the following three logical sections that separate program-level budgeting, category-based allocation, and award configuration.

1. **Program budget**: The Grant Program Manager enters the total program budget amount. This value is validated against the associated funding program budget.
2. **Budget categories**: The Grant Program Manager defines how the total budget is distributed across categories such as awards, equipment, administration, and indirect costs. The total allocation across all categories must equal 100% of the total program budget.

   Non-award budget categories such as equipment, administration, and indirect costs are for internal program tracking purposes. These categories aren't accounted for in the grant program lifecycle beyond the budget allocation step.
3. **Award allocation**: The Grant Program Manager selects an award type and configures how the award budget, derived from the Awards budget category, is distributed across recipients. Disbursement schedule and disbursement type fields are also configured in this section.



After the budget activity is completed, the Budget tab on the Grant Program record displays a read-only view.

Key benefits

The program budget and award allocation workflow provides the following benefits:

- Separates program-level budget definition from award-level configuration, reducing confusion during program setup.
- Introduces a Total Award Budget Allocated field that auto-calculates from the Awards budget category, eliminating manual calculation errors.

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- Provides real-time inline validation and auto-calculation of budget amounts as percentages and award counts are entered.
- Supports three distinct award types to accommodate different grant distribution models.

Budget categories

Budget categories define how the total program budget is split across different expense types. Each category has a name, a percentage allocation, and an auto-calculated dollar amount.

The **Award** category is a default category that can't be deleted or renamed. It represents the portion of the total program budget that is available for distribution to grant applicants. The Award category is the only category that directly influences the Award Allocation workflow and downstream proposal budget validation. It serves as the bridge between the Budget Categories section and the Award Allocation section. All other budget categories represent internal program expenses that aren't tracked beyond the budget setup step.

When the Grant Program Manager assigns a percentage to the Award category, the system auto-calculates the amount based on the total program budget. This amount populates the read-only Total award budget allocated field in the Award Allocation section.Its dollar amount populates the read-only **Total award budget allocated** field in the Award Allocation section.

Award types

The Award Allocation section supports the following award types. All award types derive their budget from the Award budget category defined in the Budget Categories section.

- **Single Award**: The full Awards category budget is allocated to a single recipient. The **Max Budget per Award** field is read-only and auto-populated from the Awards category amount. **Target Number of Awards** is system-set to 1 and isn't editable.
- **Multiple equal awards**: The Grant Program Manager enters a fixed number of awards (minimum 2). The **Max Budget per Award** field is read-only and auto-calculated by dividing the Awards category budget by the number of awards. All awards receive equal funding.
- **Multiple variable awards**: The Grant Program Manager enters a maximum budget per award as a ceiling value or enters a value equal to the total award amount for maximum flexibility. The target number of awards is optional. If no number is specified, the number of recipients and individual award amounts are determined during the award process. If a number is specified, the budget is distributed among that number of awards.

Validation chain

The program budget setup enforces validation at three levels. Upstream validation applies constraints inherited from the funding program. Validation within the program budget step itself ensures internal consistency. Downstream validation applies rules to later stages such as proposal budget and funding allocation.

1. Upstream, funding program check: The Total Program Budget can't exceed the funding program budget. When multiple grant programs exist under the same funding program, the combined budget across all grant programs is validated against the funding program total.
2. Within the program budget: The Awards budget category amount cascades directly into the Award Allocation section. The **Max Budget per Award** field is derived from and constrained by the Awards category amount. Budget category allocations must total 100% of the Total Program Budget before the activity can be marked complete.
3. Downstream, proposal budget: The Proposal Budget is validated against the Award type, Max Budget per Award, and Disbursement settings as defined in the Program Budget step.

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Downstream impacts

The **Total award budget allocated** field replaces the **Total program budget** as the reference value in the following areas:

- Proposal playbook — Proposal budget validation: In the applicant-facing Proposal playbook, the **Add proposal budget** activity validates the **Required budget allocation** field against the **Total award budget allocated** value instead of the Total Program Budget. For single award programs, the applicant's requested budget can't exceed the total award budget allocated amount.
- Funding allocation — Budget breakdown chart: The **Funding allocation** tab's Budget breakdown section displays the stacked bar graph against the **Total award budget** amount instead of the Total Program Budget.
- Funding allocation validation: The funding allocation validation checks that allocated proposal budgets don't exceed the **Total award budget allocated** value. The Remaining Budget is calculated against the Total Award Budget.

Program budget error scenarios

The program budget step displays inline error messages when validation rules aren't met. The following tables describe each error scenario grouped by section.

Program budget validation errors

Field	Error message	Trigger
Total program budget	Enter an amount up to the Funding Program budget of [amount].	The entered amount exceeds the associated funding program budget.

Budget categories validation errors

Field	Error message	Trigger
Budget categories (banner)	**Unequal budget** The "Total budget allocated" must equal the "Total program budget" field to continue.	The total allocation across all budget categories is less than the total program budget when you select **Mark Complete**.
Total budget allocated	Budget allocated exceeds total program budget by [amount].	The combined percentage allocation across all budget categories exceeds the total program budget.
Percent allocation	Percent allocation is required.	A budget category row exists but the percentage field is left empty.
Amount	Amount is required.	A budget category row exists but the amount field contains the default value None.
Category	Category is required.	A budget category row is added but the Category drop-down contains the default value None.

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Award allocation validation errors

Field	Error message	Trigger
Award Allocation (banner)	**Error Alert** The following mandatory fields aren't filled in: Disbursement schedule, Award type, Disbursement type	**Mark Complete** is selected when required Award Allocation fields are empty.
Award type	Award type is required	The Award type drop-down contains the default value None when **Mark Complete** is selected.
Disbursement schedule	Disbursement schedule is required	The Disbursement schedule drop-down contains the default value None when **Mark Complete** is selected.
Disbursement type	Disbursement type is required	The Disbursement type drop-down contains the default value None when **Mark Complete** is selected.
Target number of awards	The number should be greater than 1	Multiple equal awards is selected and the Target number of awards field is empty or set to 1 or less.
Target number of awards	Could not parse [value] as an integer	A non-integer value such as a decimal number is entered in the Target number of awards field.
Max budget per award	Must be less than [total award budget amount].	The Max budget per award value exceeds the Total award budget allocated amount. This validation applies to the Multiple variable awards type.

Related topics

- Establish the Grant Program Budget in Grants Management
- Rolling grant approvals

Establish the Grant Program Budget in Grants Management

Grant Program Managers can define, categorize, and allocate the total program budget across budget categories and award types.

About this task

The Program Budget step in the Grants management Setup playbook defines the total financial scope of a grant program. Enter award and budget information to communicate the financial scope of the grant program and help the internal team and applicants understand potential funding amounts.

From Grants management version 1.41, this step is structured into three logical sections that separate program-level budgeting, category-based allocation, and award configuration.

Before you begin

Role required: sn_svc_appl_pgm_mg.grant_program_manager or sn_svc_appl_pgm_mg.grant_program_director

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Procedure

1. In the **Total program budget** field, enter the total amount that will be used for this program.

   The total program budget can't exceed the funding program budget. If the entered amount exceeds the funding program budget, an inline error message is displayed.

2. Define how the grant program budget is split across different categories.

   The **Award** category is fixed and can't be deleted. All other categories, such as administration, equipment, and indirect costs, are configurable. You can add, remove, or rename non-award categories.

   Enter a percentage allocation for each category. The amount is auto-calculated based on the total program budget. The **Budget allocated** and **Balance left** fields update in real-time as you enter percentages.

   Important:

   Allocate 100% of the total program budget across all categories. The balance must be zero before you can mark the activity as complete.

3. On the Award Allocation form, fill in the fields.

   The **Total award budget allocated** field displays the amount derived from the Award budget category. This value updates automatically when the Award category percentage allocation changes and serves as the budget ceiling for all award type calculations.

Award Allocation form fields

Field	Description
Total award budget allocated	Read-only. Displays the amount auto-calculated from the Awards budget category percentage allocation. This value is the budget ceiling for award allocation.
Award type	Select how the award budget is distributed. Options include: ○ **Single Award**- The full Awards category budget is allocated to a single recipient. ○ **Multiple equal awards**- The Grant Program Manager enters a fixed number of awards (minimum 2). All awards receive equal funding. ○ [Optional] **Multiple variable awards**- The Grant Program Manager enters a maximum budget per award as a ceiling value or a value that's equal to the Total award budget allocated.
Target number of awards	Enter the number of awards the total grant award is allocated into for multiple award types. ○ **Multiple equal awards**- You must enter a value of 2 or greater. ○ **Multiple variable awards**, this field is optional.
Max budget per award	The maximum amount allocated to each grant award when you selected multiple award types. ○ **Multiple equal awards**- This value is read-only and auto-calculated as the total award budget allocated divided by the number of awards. ○ **Multiple variable awards**- Provide a ceiling value that is less than or equal to the total award budget allocated.

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Field	Description
Disbursement schedule	Select the frequency of the grant award disbursement. The grant award can be scheduled to disburse weekly, monthly, quarterly, bi-annually, or annually.
Disbursement type	Select **Reimbursement** to specify the manner in which the disbursement is sent to the applicant.

4. Select **Mark Complete**.

   The activity can't be marked complete until all budget categories are allocated and the balance is zero. If a balance remains, an error message is displayed.

Result
The total program budget is now allocated across budget categories and the award type is configured. The Budget tab on the Grant Program record displays a read-only summary of the configured budget.

Note:

- The budget information section in the Program setup playbook — **Publish opportunity** activity, the **Preview announcement** page is updated based on the **Award type** and the **Target number of awards** values that you provide.
- For single award programs, in the Proposal playbook — the **Add proposal budget** activity validates Requested budget total field against the Total award budget allocated and not the Total Program Budget.

What to do next
Add milestones for your Grant Program.

Related topics

Set up the Merit Review

Link an already established review framework to your Grant Program. For competitive grants, this is the merit review framework that Grant Merit Reviewers will use during their review process.

About this task
This playbook step enables you to link an already established review framework to your Grant Program. For competitive grants, this is the merit review framework that Grant Merit Reviewers will use during their review process.

Before you begin
Role required: sn_svc_appl_pgm_mg.grant_program_manager or sn_svc_appl_pgm_mg.grant_program_director

Note: Requires framework to already be done. For info on how to create this see Configure the Merit Review Scoring Framework for a Grant Program in the Reviewer Service Portal.

Procedure

1. Enter the date you want the proposal reviewed and the scores submitted by the Grant Merit Reviewer in the **Review task due date** field.

Note: The two-digit year format (yy) isn't supported. Use the dd/mm/yyyy format.

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2. Select the scoring framework you would like the Grant Merit Reviewer to use during their review of the proposal(s) in the **Review framework** field.
   To create a scoring framework:
   a. Choose **open the frameworks list**.
   b. Choose **New** and enter the name and description.
   c. Choose **Submit** and choose the new framework in the **Review framework** field.
3. Select the KB number of the scoring framework in the **Rubric** field.
4. Select **Mark Complete**.
5. Define the users who will review and score the proposals for this program, then choose **Mark Complete** to move to the next activity.

   You can update reviewer groups throughout the duration of the program as needed. For more information on how to configure external reviewer groups, see Add external reviewer groups in Grants Management.

Add external reviewer groups in Grants Management

Add the people who will review and score the proposals for this program.

Before you begin

Role required: sn_svc_appl_pgm_mg.grant_program_manager or sn_svc_appl_pgm_mg.grant_program_director

Note: Reviewer teams can be updated throughout the duration of the program as needed.

About this task

The Review Team activity allows the assignment of one or multiple groups who will review the grant applications to a Grant Program. At this stage, the Grant Program Manager selects the relevant groups, and each group can then be assigned to a single proposal during the intake/screening phase.

Note: Whenever a Review Group member is added, the users in that group are assigned to evaluate and score merit review tasks during the evaluation stage of the Proposal Playbook. If no specific Review Group is selected, all available Review Groups will appear in the **Conduct Merit Review** activity. Otherwise, only the selected Review Group will be shown.

Procedure

1. In the Review team activity, select **Add group**.
2. Select the group.
   A merit review group must already have been configured for them to show up in this step. For more information on configuring external review groups, see .
3. Select **Save**, then select **Mark Complete**.

Set up a results letter using a template in Grants Management

Select which letter templates you want to use to notify applicants of their results for their proposals submitted for this program. These templates will be sent out once the final decisions have been made. The templates include an acceptance letter, a rejection letter, an ineligible letter, and a merit review summary.

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Before you begin

Role required: sn_svc_appl_pgm_mg.grant_program_manager or sn_svc_appl_pgm_mg.grant_program_director

Note: Requires it to already be created. For info on how to create see Create a Grants Program results letter template

Procedure

1. Navigate to **All** > **CSM Configurable Workspace** > **Lists**.
2. Select **Grant Programs** > **My grant programs** and select a grant program.
3. Select which results letter templates should be used to notify applicants of their results for this program.

   Choose a letter template for Acceptance, Rejection, and Ineligible letters, and the Merit review summary. By default, the Grants Management Workspace provides generic results letter templates that can be modified to fit your organization's needs.

   You can choose the use the same template for multiple letter types.
4. Select **Mark Complete**.

What to do next

Set up the grants program announcement details

Set up the grants program announcement details

Build the program announcement. Define the required forms, terms and conditions, required budget categories, and external-facing point of contact. Provides you with an opportunity to review the grant details.

Configure the announcement details with information that should be displayed on the program opportunity announcement page that is shown to prospective applicants. You must provide a banner image, grant synopsis, eligibility summary, and grant description.

Note: The information entered in the Define program activity also appears in the program announcement.

Add points of contact to a Grant Program

Add members of your internal program team to a points of contact list to allow them to be contacted by grant seekers. This list is displayed on the grants program announcement page.

About this task

The Points of Contact (POC) activity allows a Grant Program Manager to define members of the internal program team who can be contacted by grant seekers. These team members' names and contact details will be published on the Portal and visible to applicants. This ensures that grant seekers have visibility into the appropriate internal team members for communication and inquiries.

Adding a person will create a resource assignment record where the resource (user_resource) field is a reference to a user (sys_user) record. The resource role reference will be added to the points of contact list.

A new record is created in the sn_plng_att_core_resource_assignment table with the user's name in the resource field, point of contact role in the role field, and the grant program name in the planning item field. In the user_has_resource table, if a record for that user and point of contact role already exists, no new record is created; otherwise, a new record is added.

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To ensure a user can be added as a point of contact, make sure the user has the **pps_resource** role and an employee profile (sn_employee_profile) record. For information on how to create an employee profile, see.

Note: Points of contact can only be added from the internal team list record. To add members to the internal team list record, see Add members to a Grant Program internal program team.

Before you begin
Role required: admin, sn_svc_appl_pgm_mg.grant_program_manager

Procedure

1. Navigate to **All** > **CSM Configurable Workspace** > **List**.
2. Select **Grant Programs** > **My grant programs**.
3. Navigate to **All** > **User Resource Roles**.
4. Add a record for the desired user and set the resource role to **Point of contact**.
5. Verify the user appears in the point of contact resource_role record, as well as in the proposal playbook activity.

What to do next
Configure program resources.

Configure program resources

Add links, knowledge articles, or documents that provide supplemental information about this program, its sponsoring agency, impact, or any other details that may help grant seekers better understand this opportunity.

Before you begin
Role required: admin, sn_svc_appl_pgm_mg.grant_program_manager

About this task
The **Create program announcement** stage continues with the **Resources and support** activity, which allows a Grant Program Manager to add any resources for applicants to have access to the necessary supporting materials. Grants program managers can add links, knowledge articles, or documents, and can order these resources in order of importance. A minimum of one resource is required to complete this activity. You may skip the activity if there are no supplemental resources to add.

Procedure

1. Navigate to the **Create program announcement** stage of the Grants setup playbook.
2. Select **Add Resource**, and use the dropdown to add links, knowledge articles, or documents that provide supplemental information about this program, its sponsoring agency, impact, or any other details that may help grant seekers better understand this opportunity.
3. Select **Save**, and repeat the process until all supplemental information has been added.
4. Select **Mark Complete**.

Result
The program announcement as it will appear on the grants portal is now configured.

What to do next
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Publish a grant program opportunity to the Grants Management Portal in Grants Management

Define announcement removal and proposal close dates and publish the program announcement to the Grants Management Portal.

Before you begin

Role required: grant program admin, director, manager

About this task

Procedure

1. Preview the published announcement, verifying that all of the details are correct, then select **Mark Complete**.
2. Preview the proposal content as it will be viewed by applicants on the portal, then select **Mark Complete**.
3. Submit a request to the internal program team or the grant program director to review and approve the grant proposal and choose **Mark Complete** to move to the next activity.
   Based on the configured approval groups and roles in the Internal Program Team activity during program set-up, the approval request is assigned to the designated approver.
4. Select one of the following actions to complete the review:
   - **Request Approval**- Submit a request to the designated internal program team approver or the grant program director to review and approve the grant proposal. You can publish the grant program only after it is approved by the internal program team or the grant program director.
   - **Skip approval**- Move to the next activity without requesting an approval from the internal program team approver or the grant program director.

   For more information on how to approve a pending grants program as a designated approver, see Approve publishing of a grant opportunity.

   After the approval is complete, you can either publish the grant program immediately, or schedule the date that you want the program to be displayed live.
5. Select one of the following options.

Publication Option	Description
Publish Now	Set the grant program to publish immediately.
Schedule Publication	Set the date that you want the program to be displayed live.

Note: The two-digit year format (yy) isn't supported. Use the dd/mm/yyyy format.

6. Configure the following details:

Announcement removal date	The date on which the grant or the catalog item is removed from the announcement page.
Proposal close date	The date when the proposal is closed.

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7. Select **Publish** to create the grant catalog item and publish the grant to the Grants Management Portal either immediately, or on the scheduled date.
8. Select one of the following actions to complete the review:
   - **Request Approval**- Submit a request to the internal program team or the grant program director to review and approve the grant proposal. You can publish the grant program only after it is approved by the internal program team or the grant program director.
   - **Skip approval**- Move to the next activity without requesting an approval from the internal program team or the grant program director.
9. Either publish the grant program immediately, or schedule the date that you want the program to be displayed live.
   Configure the following details:
   - **Announcement removal date**- The date on which the grant or the catalog item is removed from the announcement page.
   - **Proposal close date**- The date when the proposal is closed.
10. Choose **Publish** to create the grant catalog item and publish the grant to the Grants Management portal.

Result
Your grant program has been published (or scheduled to be published) and ready to begin the application process.

What to do next
Once the grant program is published, applicants can begin submitting proposals for the program through the Grants Management Portal. For more information on how to view and manage all the grant proposals submitted for your grant program, see .

Approve publishing of a grant opportunity

As the designated approver of an internal program team, you can approve a grant program that is pending publishing to the grant management portal for applicants to view.

Before you begin
Role required: gmp director?

In order to do this, you need to be added as an approver in the internal program team in the program setup. For more information on how to create an internal program team and designate an approver, see Add members to a Grant Program internal program team

Procedure
1. Navigate to **All** > **CSM Configurable Workspace**.
2. Select the alert icon on the banner.
3. Select the approval notification for the pending grant program.
4. Select **Approve**.

Result
The grant program is now approved and is rerouted back to the Grant Program Manager, who will set it to be published to the Grants Management Portal. For more information on publishing a grant program to the portal, see Publish a grant program opportunity to the Grants Management Portal in Grants Management.

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Using the Grants Proposal Management Playbook in Grants Management

Use the Grants Proposal Playbook to manage the life cycle of grant applications submitted by organizations through the portal.

The Grants Management case, or the Grant Proposal, is designed as a case type which extends the Government Service Case and functions as the primary transactional entity for receiving Grant Applications/Proposals. When proposals are submitted, they are entered into this dedicated table. A workflow is then initiated, which is presented to Grants Program managers and directors as a Proposal Playbook. This structured process ensures the efficient management and review of grant proposals. "Proposal" and "application" are used interchangeably.

The Grants Management Proposal Playbook includes Application Intake, Proposal Screening, Proposal Evaluation and Scoring, and Decision. It is designed to systematically manage the life cycle of grant applications submitted by organizations through the portal. This workflow is divided into four stages, each with specific objectives and activities that guide the application from initiation to final decision.

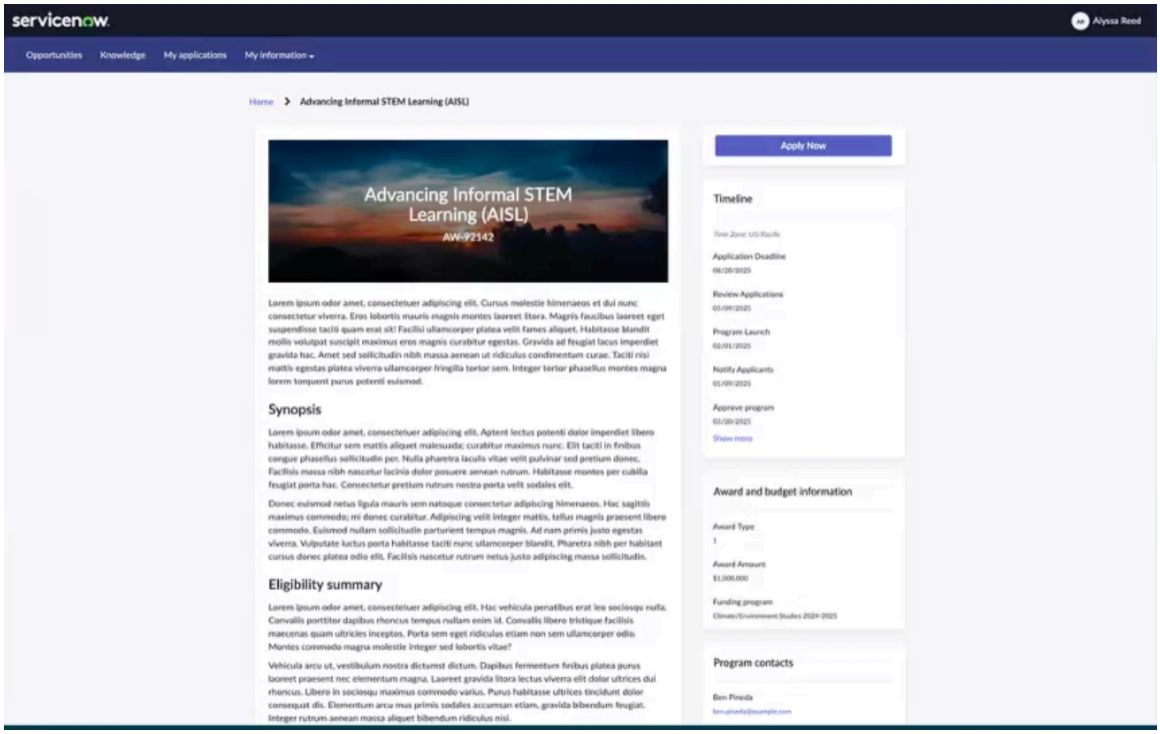
A grant proposal is the formal submission prepared by an individual, non-profit, or organization seeking funding for a specific project or initiative. The Grants Management workflow provides agents with a playbook that guides them step-by-step through reviewing, scoring, and deciding on proposals submitted by individuals to a specific grant program that is has been made available. Grants **proposal** and grants **application** are used interchangeably.

Proposal Intake

Role required: Grant Applicant (role: sn_gsm.business_contact)

For applicants, the application intake experience happens entirely on the Grants Management Portal, separate from the grants program manager/agent view. This feature improves self-service with a Grants Management Portal that simplifies finding, applying for, and tracking grants. Reduce applicant effort with guided intake, including save, resume, and export functionality . Increase agent productivity with tools to make screening submissions easy. This is where applicants will submit proposals for a grant program that was published by a GPM using the setup step. They can then be screened in the agent portion of the intake and screening feature. With a guided intake setup, including save, resume, and export functionality, Grants Management Intake aims to simplify the process of finding, applying for, and tracking grants for applicants.

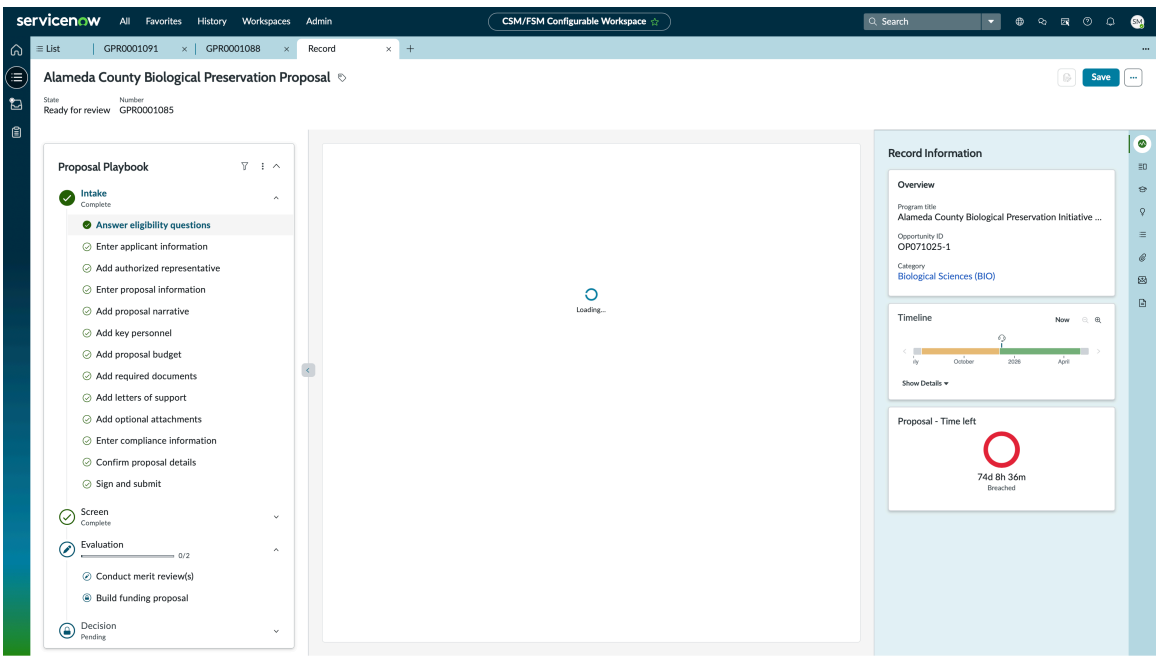
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An applicant submitting a proposal is the first stage of the grants proposal playbook. The playbook is in the screen stage by the time it arrives to the agent. An agent cannot submit an application on behalf of an agent.

Once the application is routed to the Grant Program Manager, the intake stage and all of its activities will show as complete in the Grant Manager's proposal playbook, and it will become read-only.

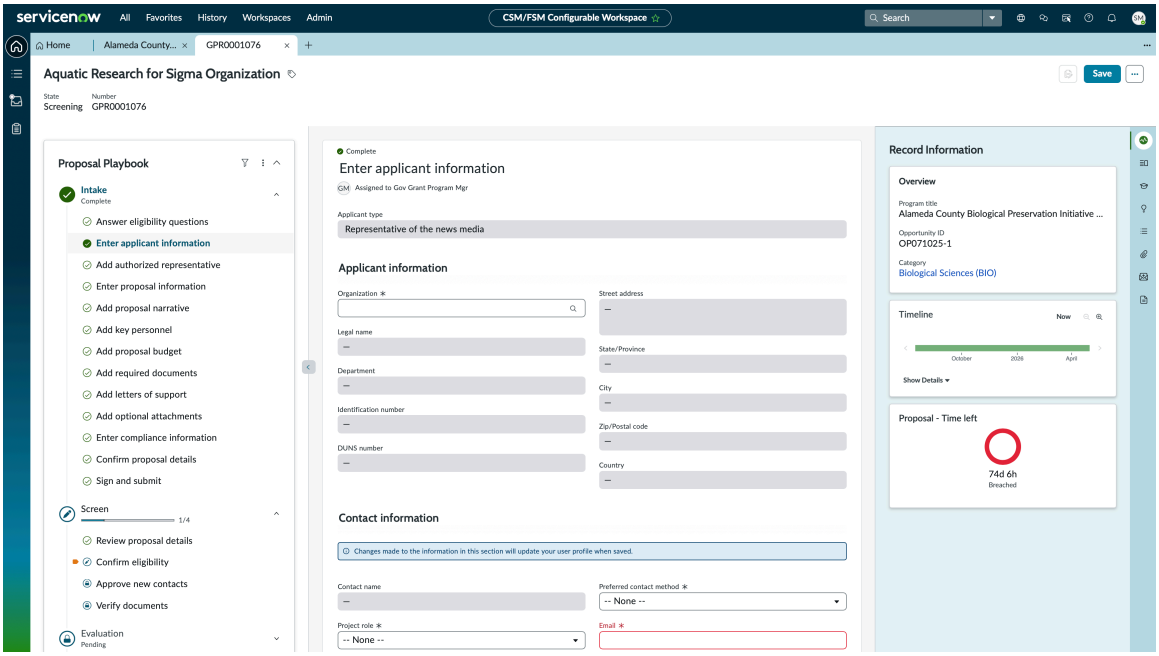
Answer Eligibility questions



Prospective applicants are posed a series of qualifying questions, ensuring that applicants meet the predefined eligibility requirements.

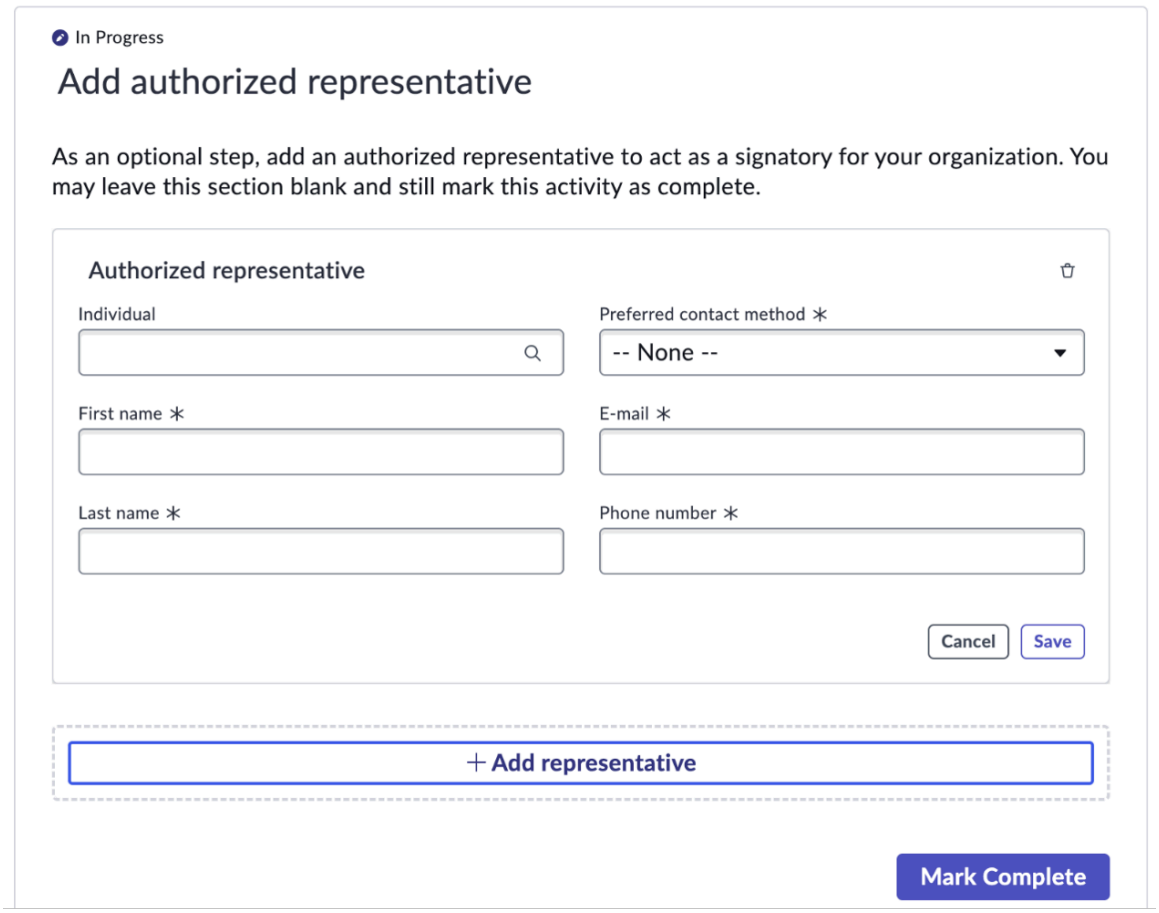
Enter applicant information

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The Applicant enters primary information about themselves and the organization on behalf of which they are seeking a grant award. This information is stored in the `sn_svc_appl_info_applicant` table.

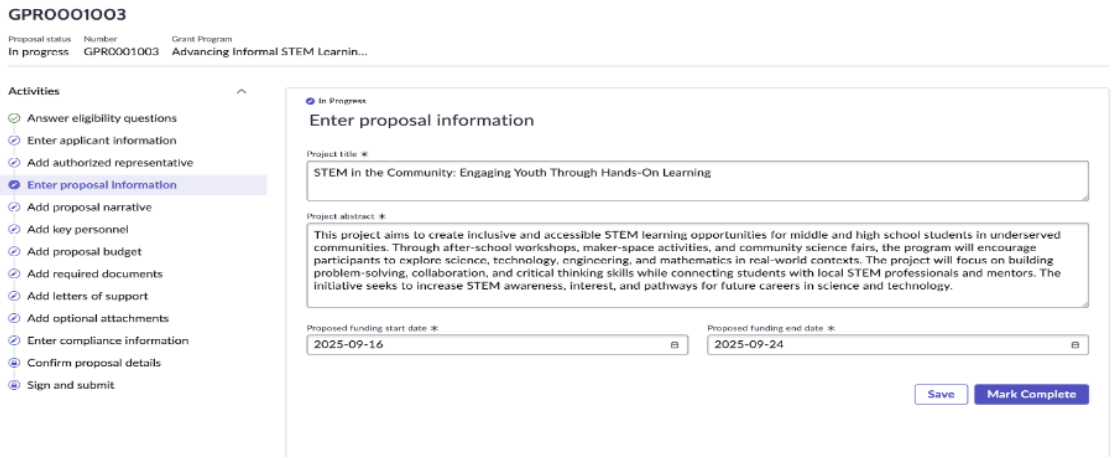
Add Authorized Representative



Applicants can add individuals that can act as a signatory for their organization. This section may be skipped if there are no authorized representatives other than the primary applicant.

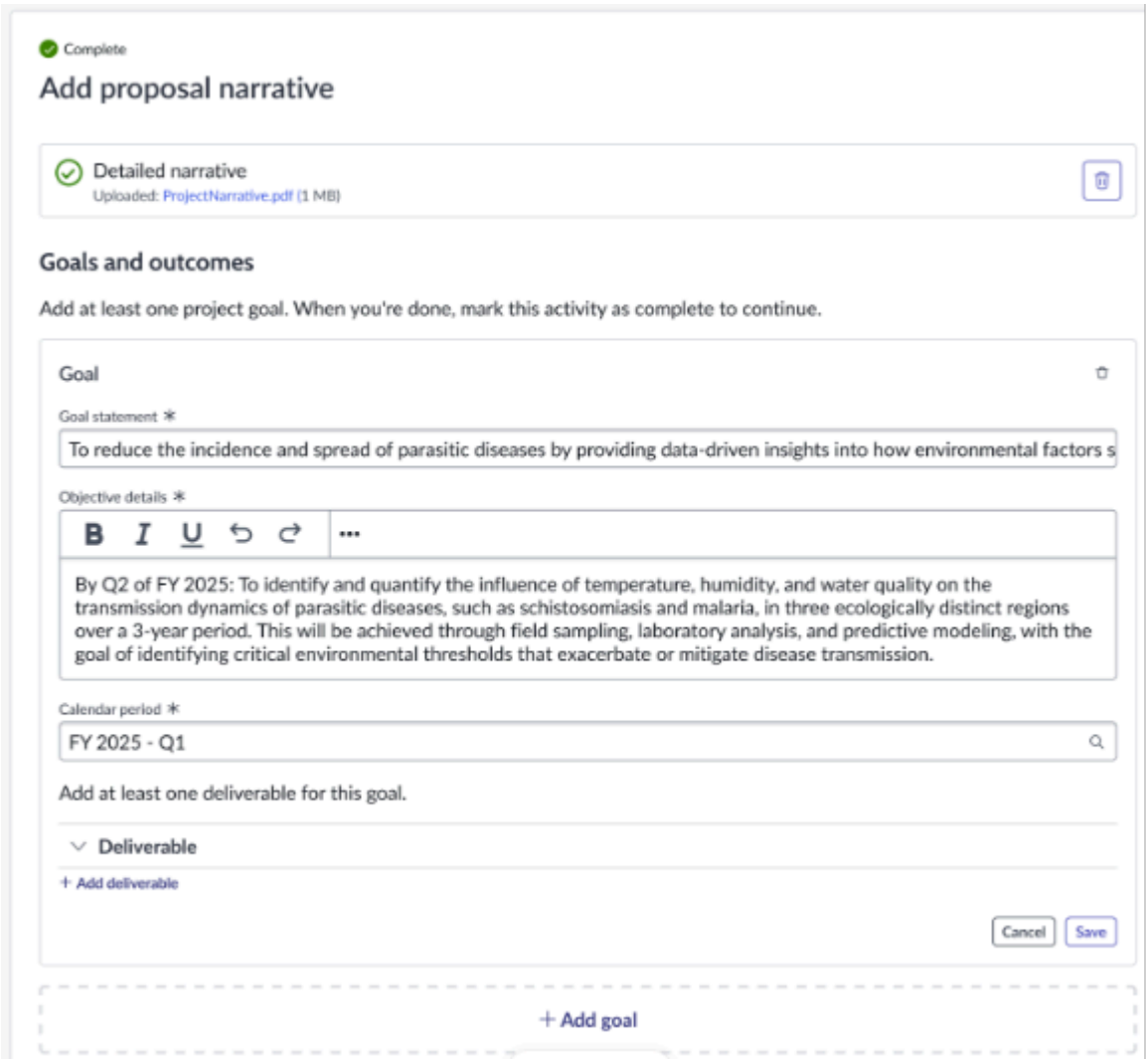
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Enter proposal information



Applicants use this step to add the necessary grant proposal information, such as the project title for which they are seeking funding, the project abstract, proposed project funding start date, and proposed funding end date.

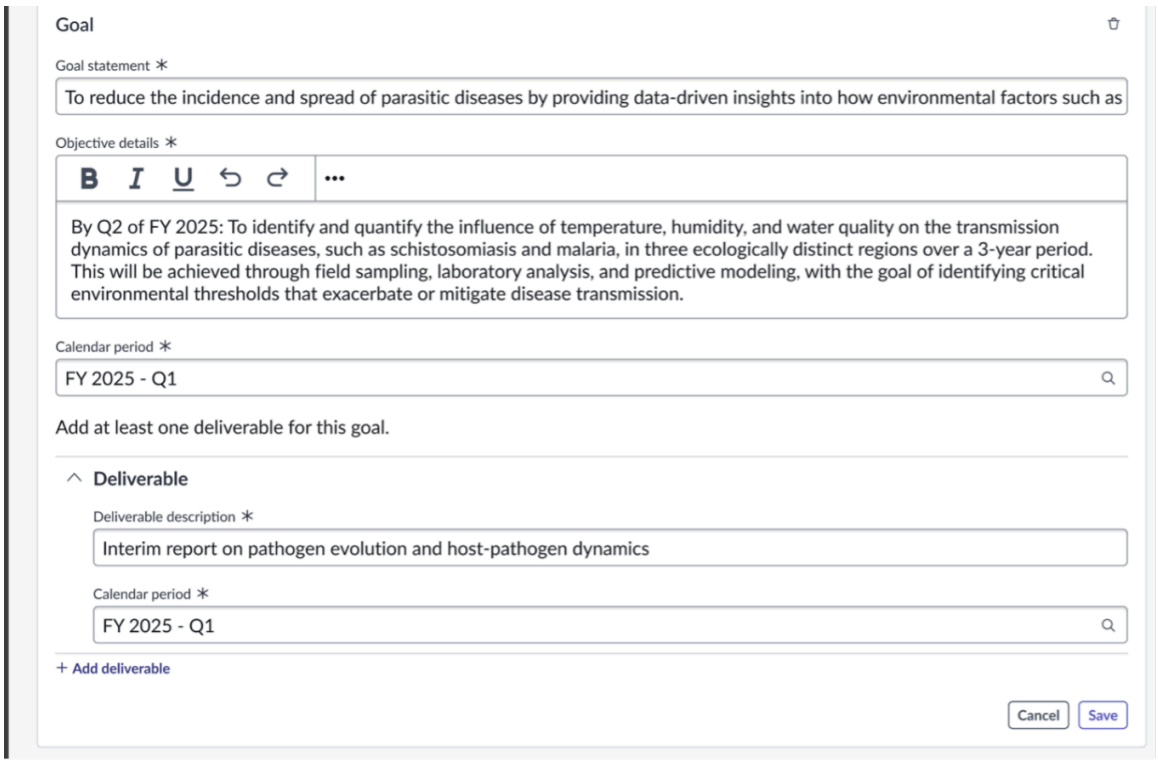
Add proposal narrative



Applicants provide the narrative around their proposal according to the narrative requirements set by the Grant Program Manager, which determines the required

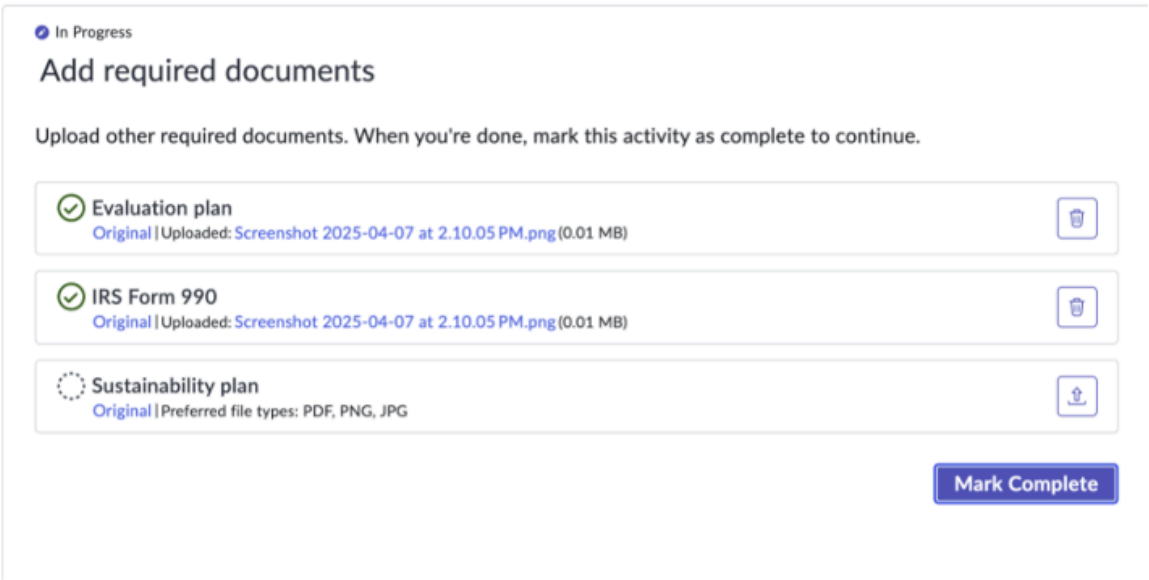
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number of goals, and whether the Objective details field is shown as an upload or a form.



Applicants can enter goals and related information by selecting **Add goal**, and add multiple deliverables by selecting **Add deliverable**.

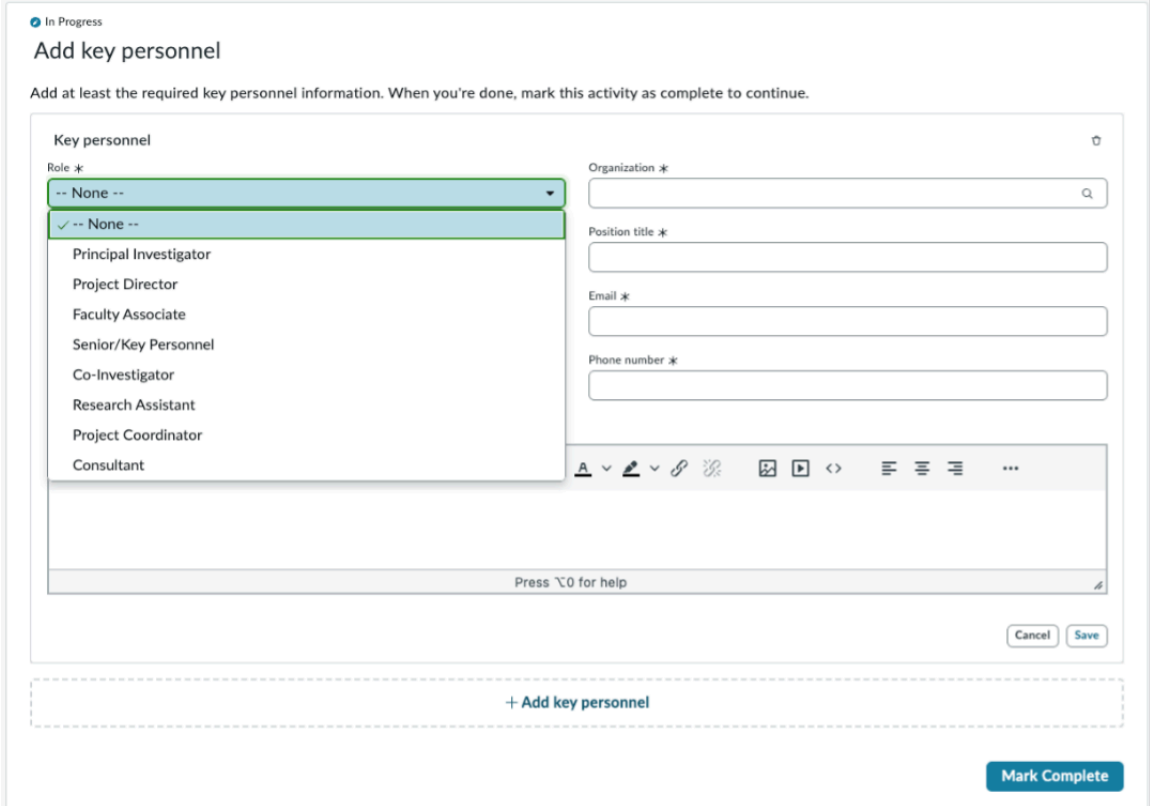
Add Required Documents



Applicants can download the required document template and upload the required documents to support their application.

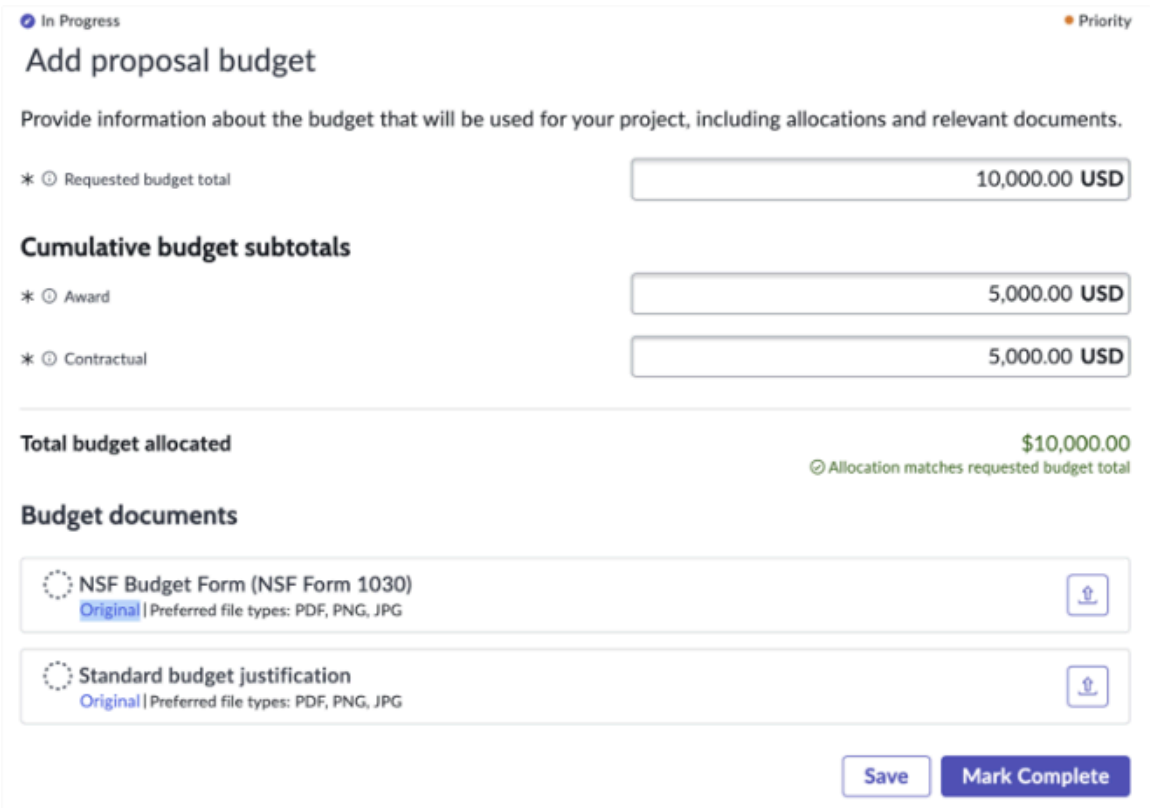
Add key personnel

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Applicants add required and additional key personnel to their proposal. By default, applicants can choose to add the following types of personnel to an application: Principal Investigator, Project Director, Faculty Associate, Senior/Key Personnel, Co-Investigator, Research Assistant, Project Coordinator, or Consultant.

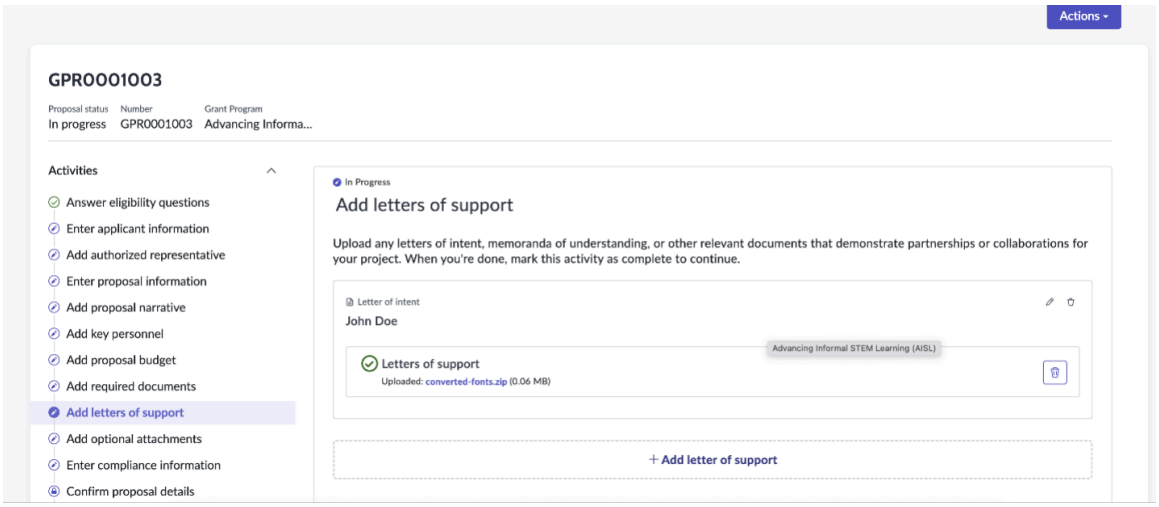
Add proposal budget



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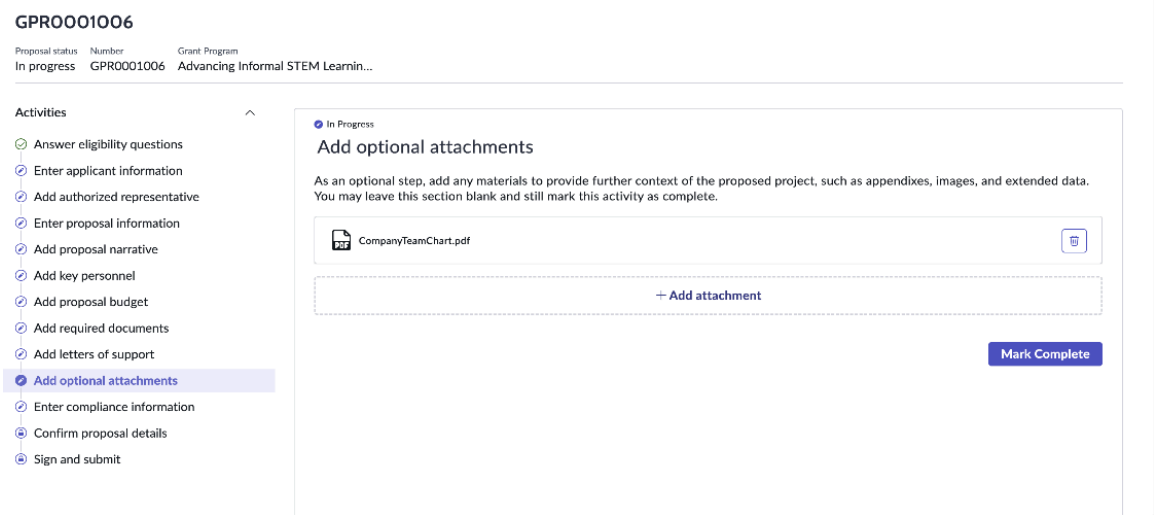
Applicants can request or update their budget, upload supporting documents, and ensure the proposal includes a clear financial plan for review. If the budget amount entered exceeds the limit set by the Grant Program Manager (visible on the Grant Program announcement), an error will be shown.

Add Letters of Support



Applicants upload any letters of intent, memoranda of understanding, or any other relevant documents that demonstrate partnerships or collaborations for the project.

Add optional attachments



Applicants can add include additional attachments to support their grant application if necessary. It provides the applicant with the opportunity to upload optional attachments that may be important for the proposal but were not included in earlier activities.

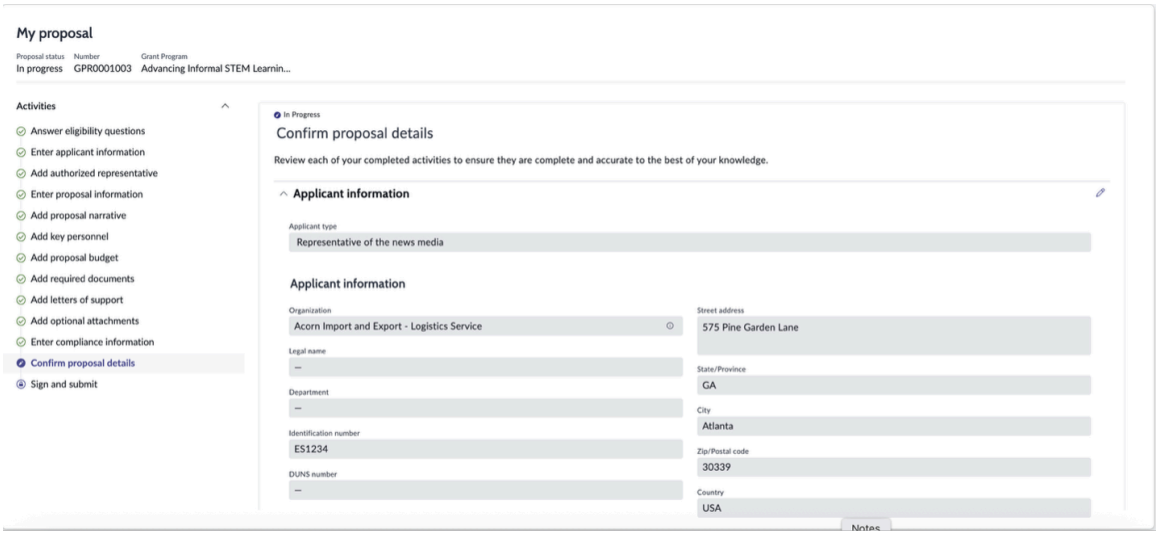
Enter compliance information

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Here, the applicant will answer a series of questions that ensure that their proposal is compliant with regulations set forth by both the grant program manager and other regulatory agencies. This activity uses a sub-flow to generate an instance of the smart assessment template selected and used in the compliance requirements activity of Grants Management program setup playbook. The sub-flow only runs once in the lifetime of the activity to create the instance and associate it with the current proposal. Responses can be changed until merit review tasks have been created.

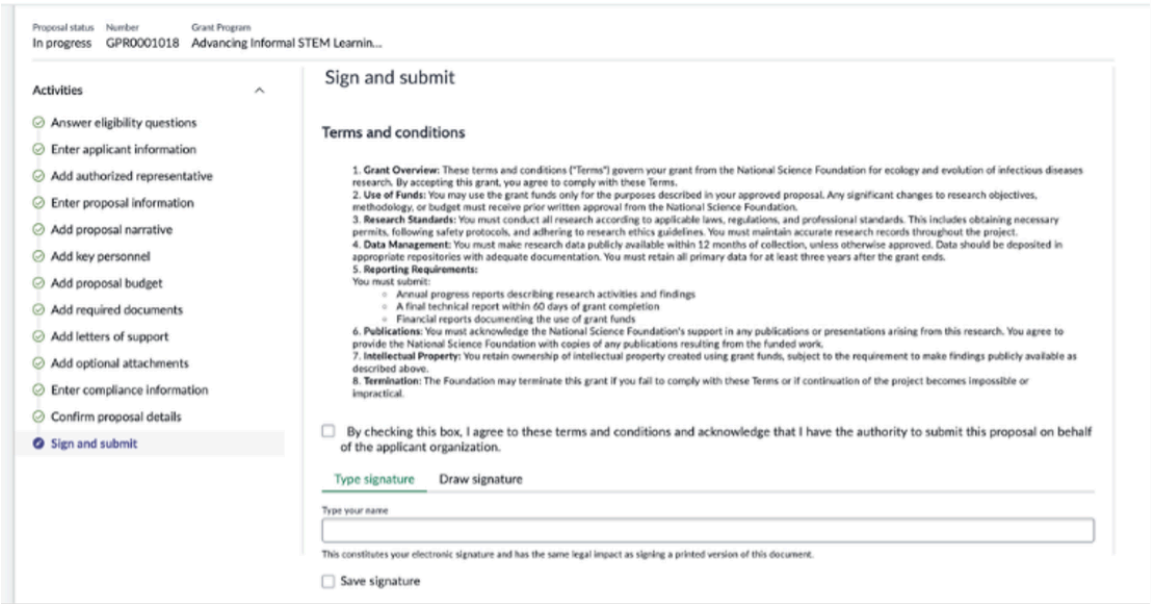
Confirm proposal details



Applicants can review and confirm all details related to their grant proposal here before submission of the application.

Sign and Submit

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Allows the applicant to review, authorize, and finalize their submission. Captures the applicant's signature and completes the application submission. The Terms and Conditions displayed in this activity are retrieved from the Point in Time Content (sn_svc_appl_info_pitc) table. For more information on configuring terms and conditions, disclaimers, and other point-in-time content for a grant program, see #unique_369.

Proposal Screening

Role required: Grant Program Manager (sn_svc_appl_pgm_mg.grant_program_manager).

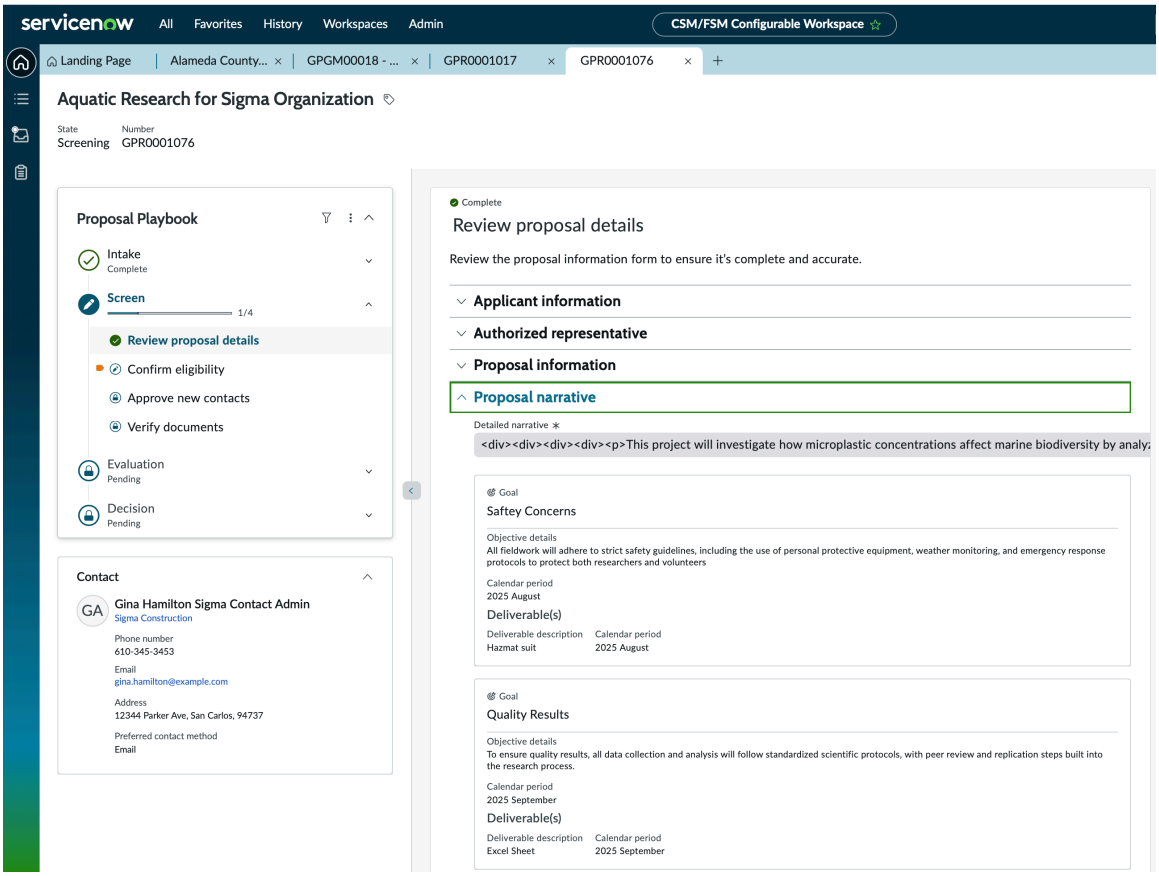
For grants program managers (case agents) and directors, the application screening feature provides visibility across all proposal and submission details related to the grant program, once an applicant submits a proposal for an active grant program created by the grant program manager. Tools for agents to streamline the screening of submissions. The Grants Proposal Workflow in Public Sector Digital Services Grants Management provides a structured process for managing grant proposals from submission for the pre-award phase.

Using the Grants Management Screening feature, managers can:

- Review the proposal
- Confirm eligibility
- Approve new contacts
- Verify documents submitted by the applicants

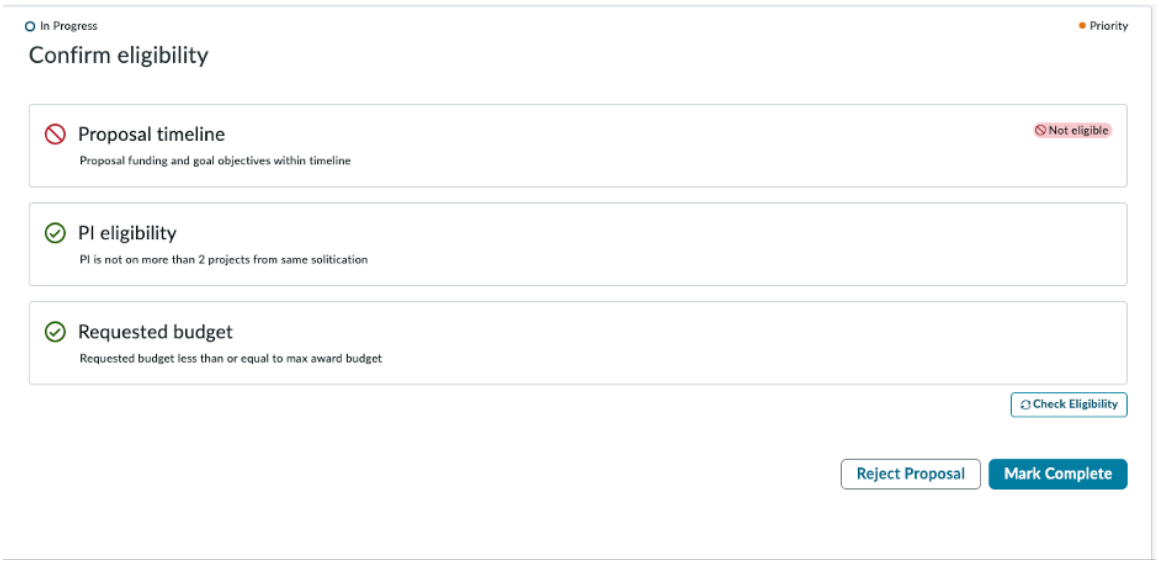
Review Proposal Details

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Get a comprehensive view of information collected with each applicant's grant proposal (submitted during Applicant Intake). Grants program managers have read-only access to the proposals, ensuring data integrity while allowing them to stay informed on submitted proposals.

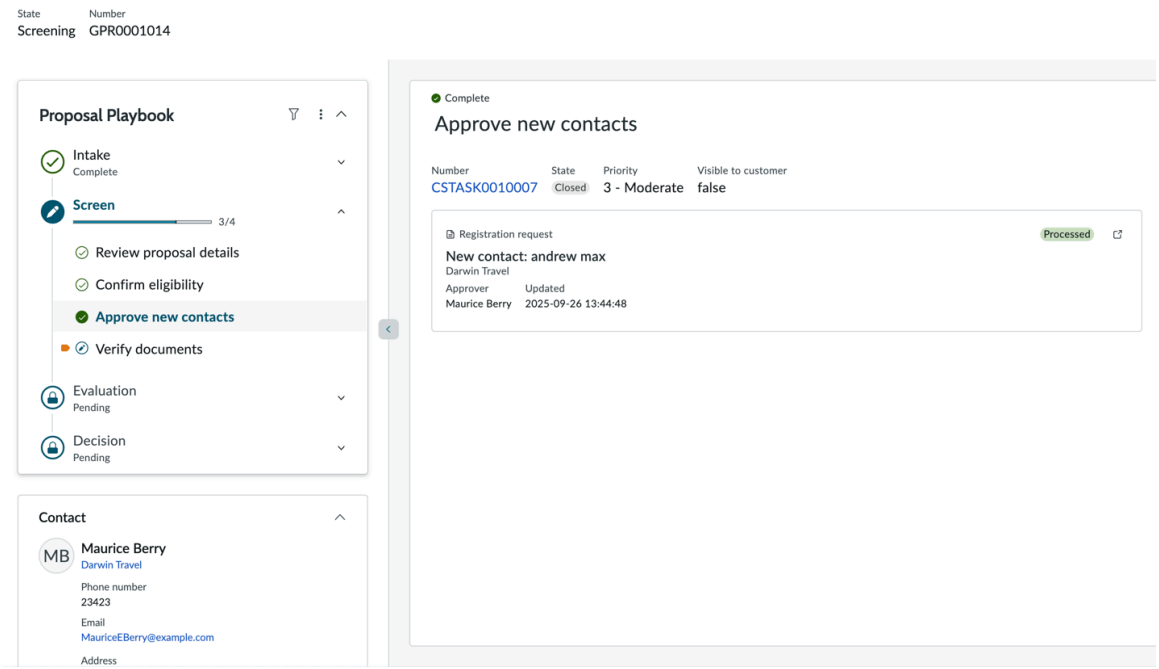
Confirm eligibility



Determine the eligibility of an applicant based on the execution of PaCE polices linked to the proposal's program, defined during the Program Setup phase. For more information on setting up or modifying PaCE policies to determine post-submission eligibility of a grant application, see Configure Eligibility Rules Engine Policies in Grants Management.

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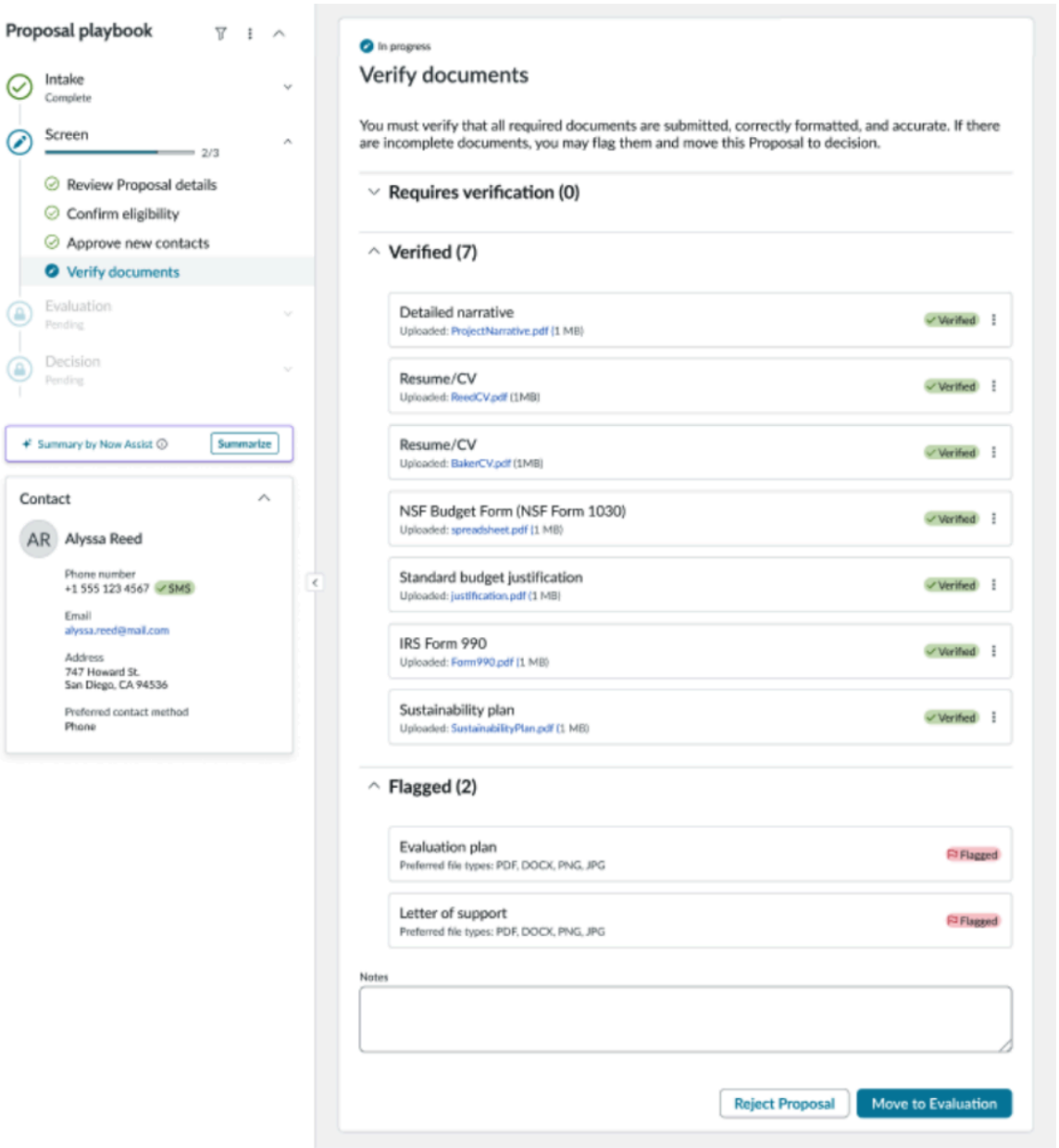
Approve new contacts



View and approve, or reject, any new contacts or authorized representatives, submitted in the **Add authorized representative** activity by the applicant, that are not already in the system's user database. A user must have the business contact (sn_gsm.business_contact) role to be eligible as one of the grant proposal's contacts. The case cannot proceed until the Grant Program Manager approves or rejects the contact.

Verify Documents

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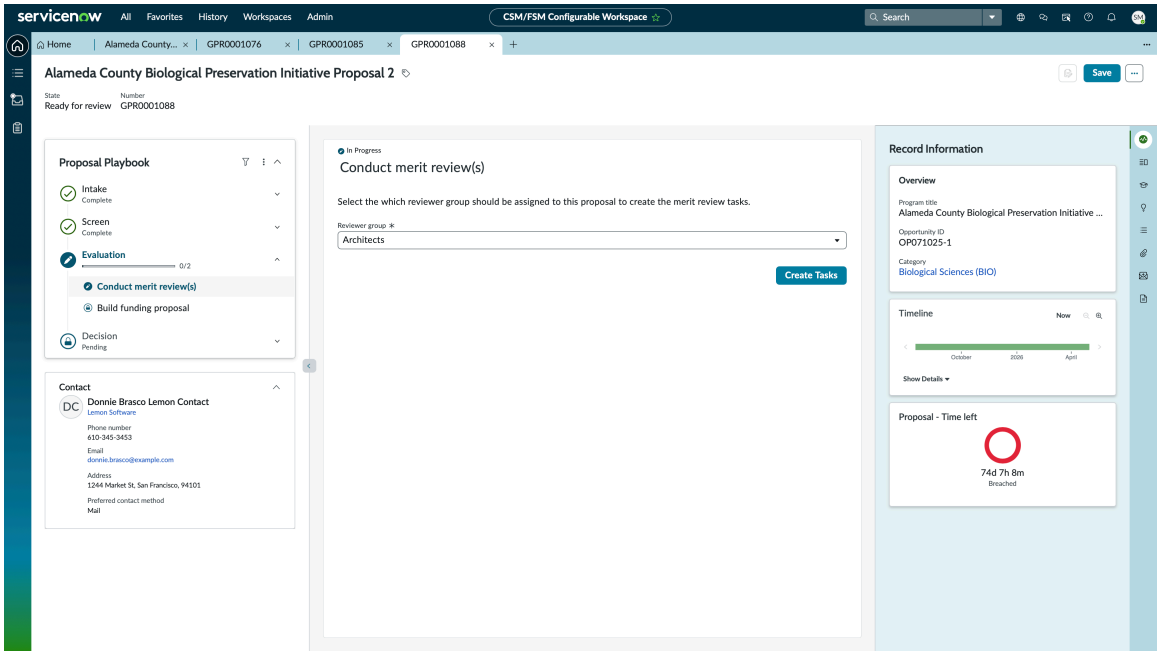
Verify that all required documents are submitted, correctly formatted, and accurate. If there are incomplete documents, you may flag them and move the proposal directly to decision. The manager has the option to undo a verification if needed.

Proposal Evaluation

Required role: Grant Program Manager (sn_svc_appl_pgm_mg.grant_program_manager).

Grant proposals that pass the screening stage enter the evaluation phase, where the grants program manager creates and assigns proposal evaluation tasks to a group of external evaluators known as merit reviewers. Once all evaluation tasks are completed, the application is ready for the funding proposal phase, where certain grant applications will be selected for approval.

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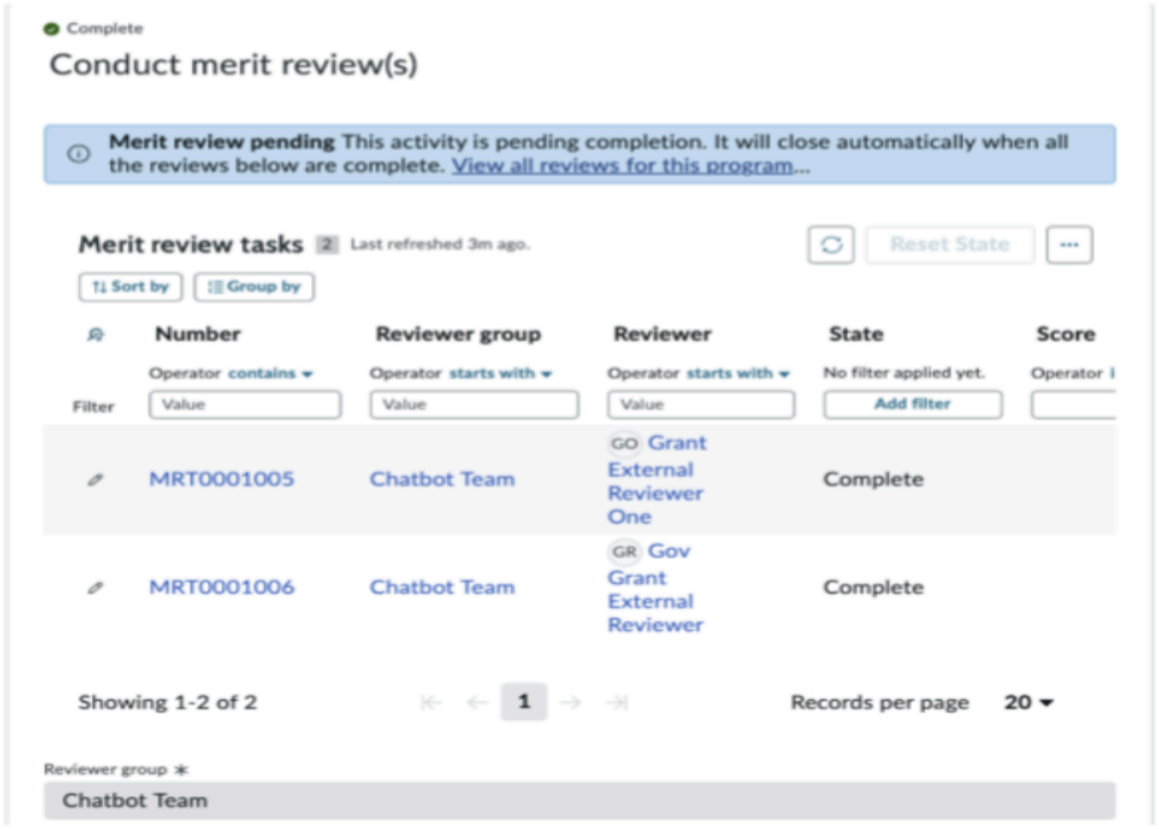


The funding proposal workflow involves the assessment of the evaluations conducted by the merit reviewers, and the definition of a proposal which will be sent to the Grant Program Director (GPD) for final approval. The funding proposal contains the individual grant applications which the grants program manager has selected for approval, as well as the proposed award amount for each.

Note: A grants program director can only approve or decline the entire funding proposal, not the individual grant proposals (applications) contained within it. A decline involves the creation of a new funding proposal which must be submitted again for approval.

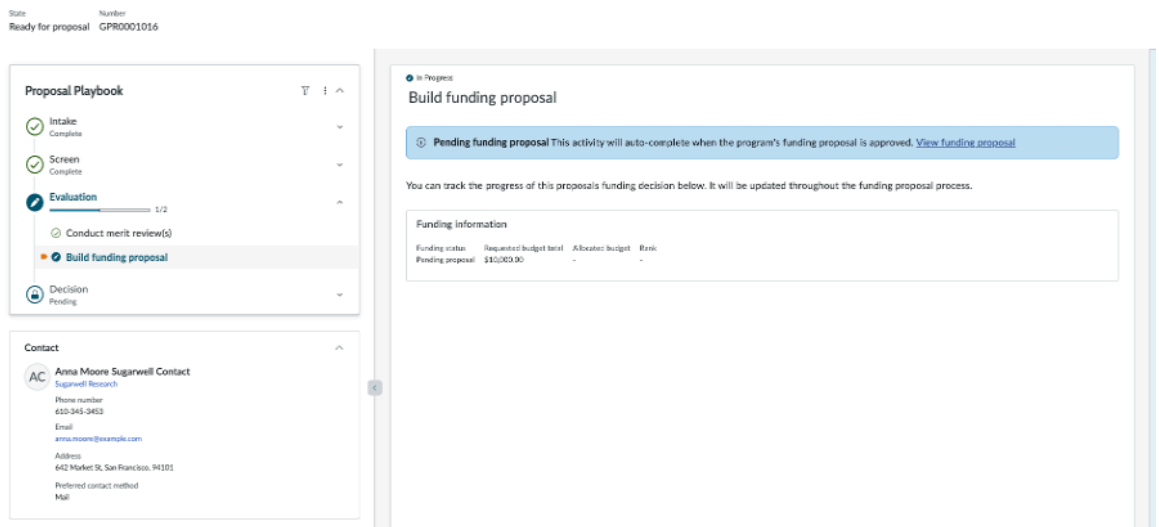
Conduct Merit Review

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Select a reviewer group from the list of reviewers from the grant program and create merit review tasks for each of the reviewers evaluating the grant proposal. Once these tasks are created, the Grant Program Manager can release them to the external reviewers using the Reviewer Service Portal, where they score proposals against a pre-defined criteria set forth by the Grant Program Manager or Director.

Build Funding Proposal



Evaluate the funding information of the current proposal, and modify the funding information under funding proposal tab.

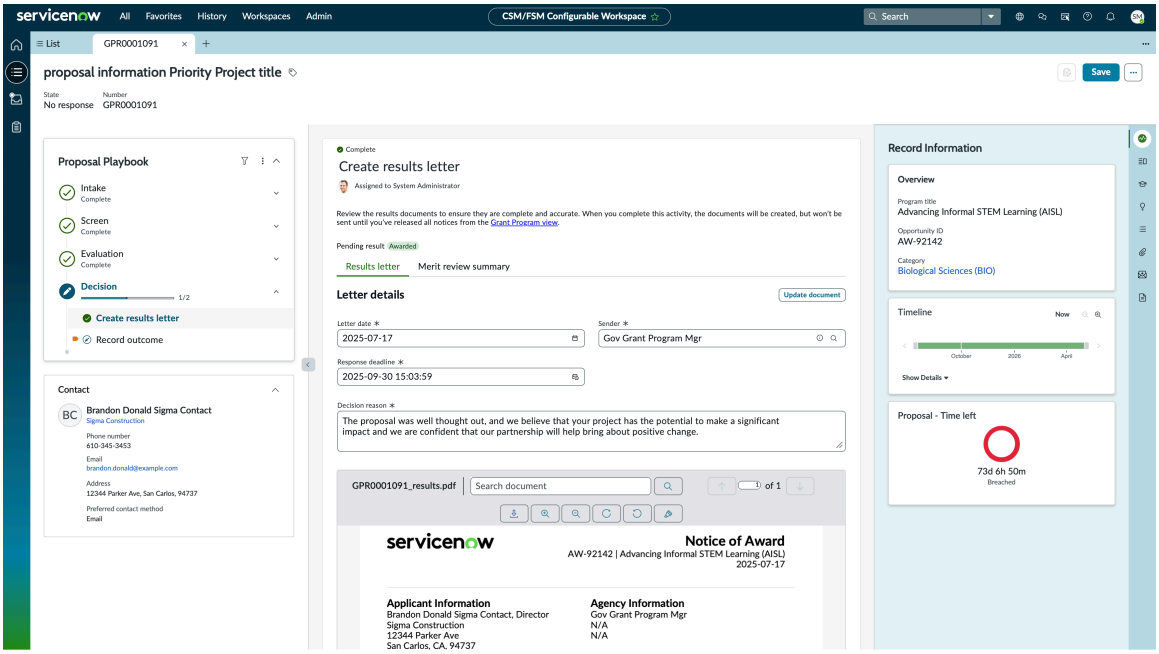
Proposal Decision

Required role: Grant Program Manager (sn_svc_appl_pgm_mg.grant_program_manager).

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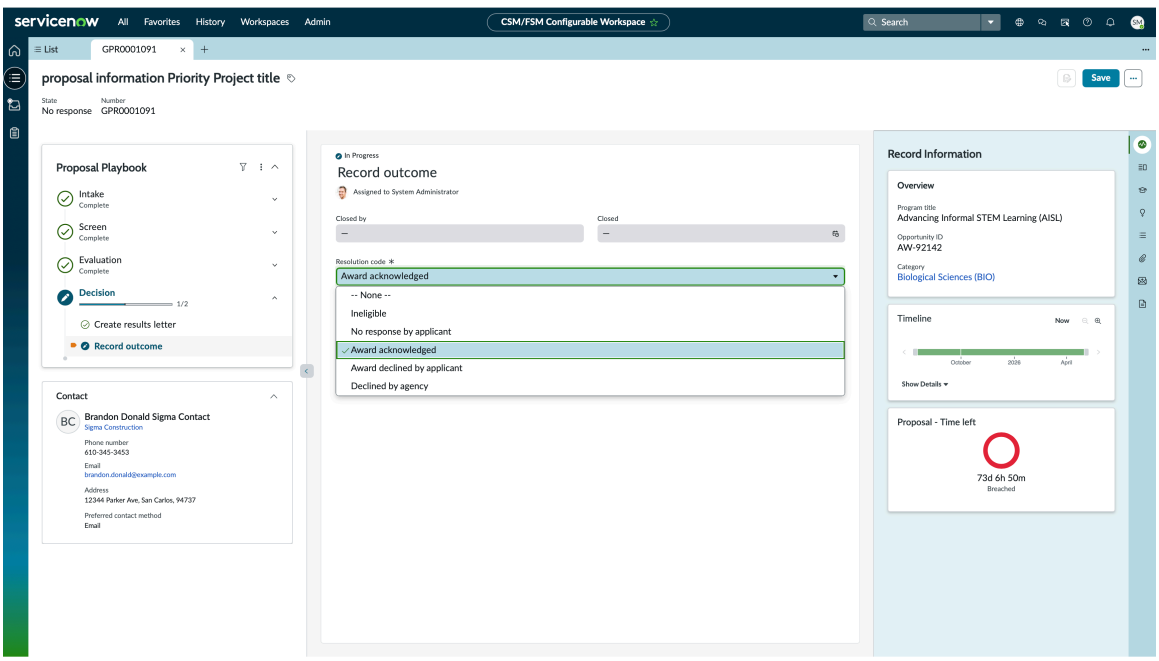
The final stage of the workflow is the decision phase. Based on the funding decisions made by the Grant Program Management team, a corresponding result letter is generated for each application. When all result letters across all applications are prepared, they are released, and the process awaits the acceptance of the outcome by the respective applicants. Applicants can access the results letter on the portal and either acknowledge or decline the award, and managers can capture the outcome of the proposal and close the record.

Create Results Letter



Manage the release of result letters in a coordinated manner, ensuring that applicants receive results at the same time and that no applicant is notified before all decisions are finalized. Based on the funding decisions made by the Grant Program Management team, a corresponding result letter is generated for each application, and when all result letters across all applications are prepared, are released to applicants by the Grant Program Manager.

Record Outcome



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Await the acceptance of the outcome by the respective applicants.

Rolling grant approvals

Rolling grant approvals give grant program managers the flexibility to propose and submit funding decisions for any scored subset of applications during the Funding Allocation stage. Decisions can be submitted at any time, without waiting for the entire proposal portfolio to complete review.

The **Funding Allocation** tab in the grant program workspace supports incremental decision-making alongside the traditional full-portfolio model. Grant program managers can process funding decisions as proposals are scored, grouping them into batches for Grant Program Director approval. No configuration toggle is required — both models are available by default.

From Grants Management version 1.31, you can choose to process funding decisions incrementally as proposals are scored, or continue working in the traditional full-portfolio model. No separate mode or configuration toggle is required. The rolling approval behavior is additive: customers running traditional competitive programs can continue their existing workflow unchanged. Customers with rolling programs gain the incremental processing capability they need, which is available by default.

Key concepts

Grants Management version 1.31 introduces two new records to support rolling grant approvals.

- **Funding Allocation Review Task** — the batch record the Grant program manager submits, storing the grant program, recommendation reason, proposal counts, allocated amount, and review state.
- **Funding Allocation Proposal Mapping** — the record linking each proposal to its review task, with active/inactive flag to indicate the proposal state and the Grant program director comments.

A Funding Allocation Request is a record type that acts as an approval packet grouping a selected subset of proposals for Grant program director review. The funding request contains the Grant program manager's recommendation reason and the associated budget figures. The batch can include both funding and decline recommendations. Funding requests are created automatically when the Grant program manager selects **Send for Approval** on the **Funding Allocation** tab.

Multiple funding requests can exist simultaneously for the same grant program, and each progresses through its own lifecycle independently.

Related topics

Use Rolling grant approvals

Mark proposals

Submit a Funding Allocation Request

Review and Approve a Funding Request

Release result notices to applicants

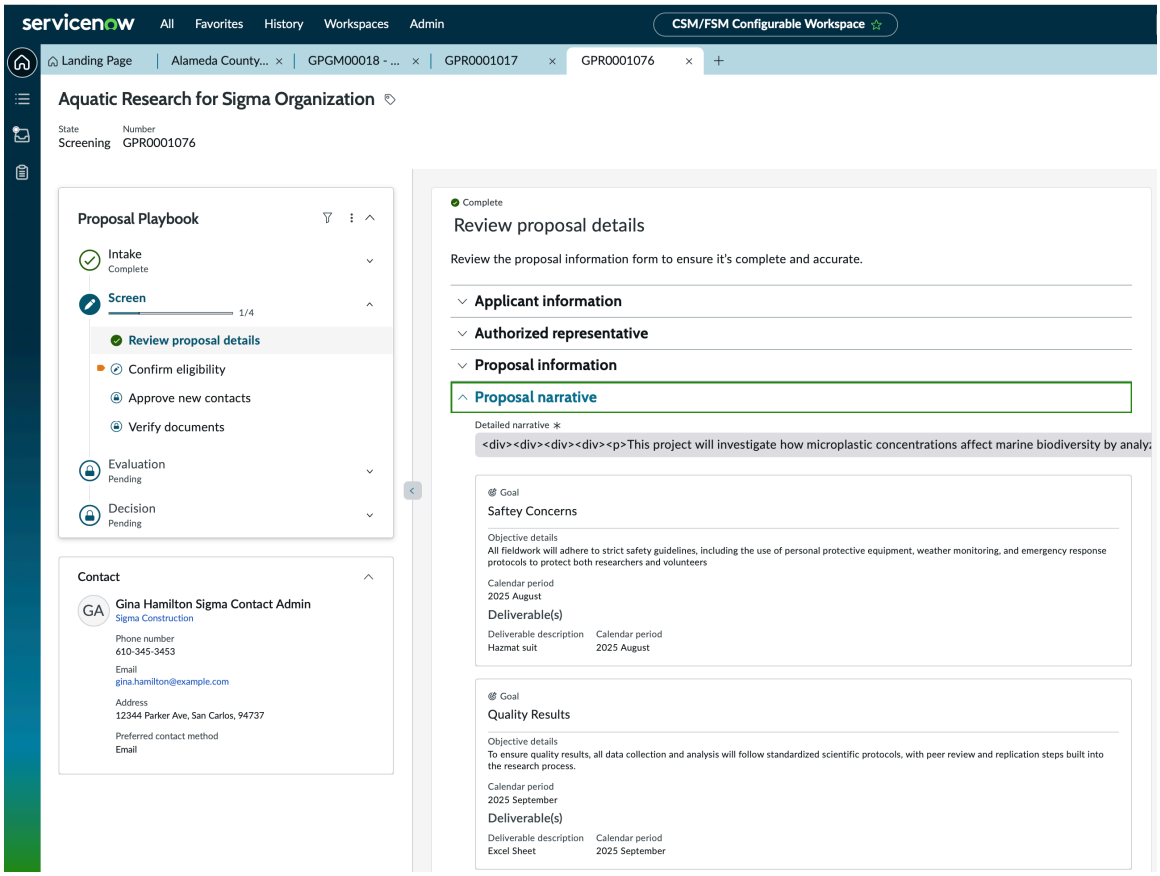
Grant Proposal funding statuses

Public Sector Digital Services Data Model

Screen a grant proposal in the Grants Proposal Playbook

You can use the Grants Proposal playbook to review information provided by the applicant, along with other relevant documents. From Grants management version 1.41 onward, during screening, you can also flag documents for verification and request updated documents from applicants.

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The Screening stage of the Grants proposal playbook consists of the following tasks:

- Reviewing the proposal
- Checking and confirming eligibility
- Approving new contacts
- Verifying documents submitted by the applicants

As the grants program manager or the grants program director, you can review the proposal details and the required documents from the proposal. After verifying the documents, you can assign the proposal to yourself, and either reject the proposal or move it to the Evaluation stage. The case details entered by the applicant in the intake stage are displayed to the grant program manager or the grant program director in an accordion view for a comprehensive review experience.

Document verification

During the Verify documents activity, you can flag documents and request resubmission without losing the audit trail. From Grants management version 1.41, the document verification capability provides enhancements to the **Verify documents** screen:

- Flag documents: When you flag a document, the document remains in the system and is visible in the Flagged section. Flagged documents retain all metadata including file name, size, applicant name, and document type. Prior to Grants management version 1.41, flagged documents were simply deleted and there wasn't any options to undo it.
- Reset status: You can reverse a flagged document by selecting the reset status icon on the flagged document row. The document moves back to the Requires verification section. No confirmation is required, and no file content or metadata is lost.

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- Request documents from applicant: You can request updated documents from the applicant by selecting **Request Documents** at the bottom of the Verify documents screen. This action permanently deletes the flagged document, creates a case task for the applicant to re-upload a new document, and sends a notification to the applicant in the applicant portal.

How document verification works

From Grants management version 1.41, the document verification capability provides grant program managers the option to flag a document for a re-upload. The document verification flow involves the following process:

1. The Grant program manager flags a document during the Verify documents activity and provides a reason in the **Message for Applicant** field. The document moves to the Flagged section and the Flagged count increments.
2. The flagged document is deleted and its status changes to **Pending resubmission**. A case task is created and assigned to the applicant who owns the flagged document.
3. The case state changes to **Awaiting Documentation**, and an **Upload Additional Documents** activity is added to the playbook.
4. The applicant receives a notification and can re-upload the corrected document through the applicant portal in the **Upload additional documents** activity.
5. After the applicant uploads the corrected document and marks the activity complete, the Upload Additional Documents activity closes automatically and the grant program manager can continue the verification.

Document verification states

From Grants management version 1.141, documents in the Verify documents activity can have the following states:

Document verification states

State	Description
Requires verification	The document has been uploaded by the applicant and is waiting for review by the grant program manager or grant program manager.
Verified	The grant program manager has confirmed that the document meets the application requirements.
Flagged	The document does not meet the requirements and requires resubmission. Flagged documents remain in the system and retain all metadata.
Pending resubmission	A document resubmission request has been sent to the applicant. The original flagged document has been deleted and the applicant has a case task to upload a replacement.

Related topics

Check eligibility of an applicant

Verify documents uploaded to a grant proposal

Check eligibility of an applicant

Check eligibility of an applicant submitting through the Portal using the predefined eligibility rules created with Policy as Code Engine (PaCE).

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Before you begin
Role required: sn_svc_appl_pgm_mg.grant_program_manager or sn_svc_appl_pgm_mg.grant_program_director

About this task
Image of check eligibility screen.

Procedure
1. Review the information collected during the intake stage, and confirm that the information is complete and correct.

   If the agent is selecting the case from an unassigned queue, they will see the option to **Assign to Me**, which will update the case state from **New** to **Screening**. If the case is auto-assigned, they will see the option to **Mark Complete**.

2. Correct any errors before submitting the application, and select **Mark Complete**.
   Select the pencil icon to navigate back to an Intake stage activity that needs to be corrected.
   If the proposal needs to be rejected, select **Reject Application** to update the case state from **New** to **Screening Failed**, moving it directly to Decision.
3. To check eligibility using the predefined eligibility rules created with Policy as Code Engine (PaCE), navigate to , and select **Check Eligibility**.
   PaCE triggers an eligibility response for the Grant Program Manager to decide whether or not the proposal should continue for further review. Based on the provided responses, the system determines whether the applicant meets the eligibility criteria and classifies them as eligible or ineligible. The results are consolidated and displayed in this step for the agent to review.
4. Review the results of the eligibility screening, and select **Mark Complete** if there are no changes to be made.

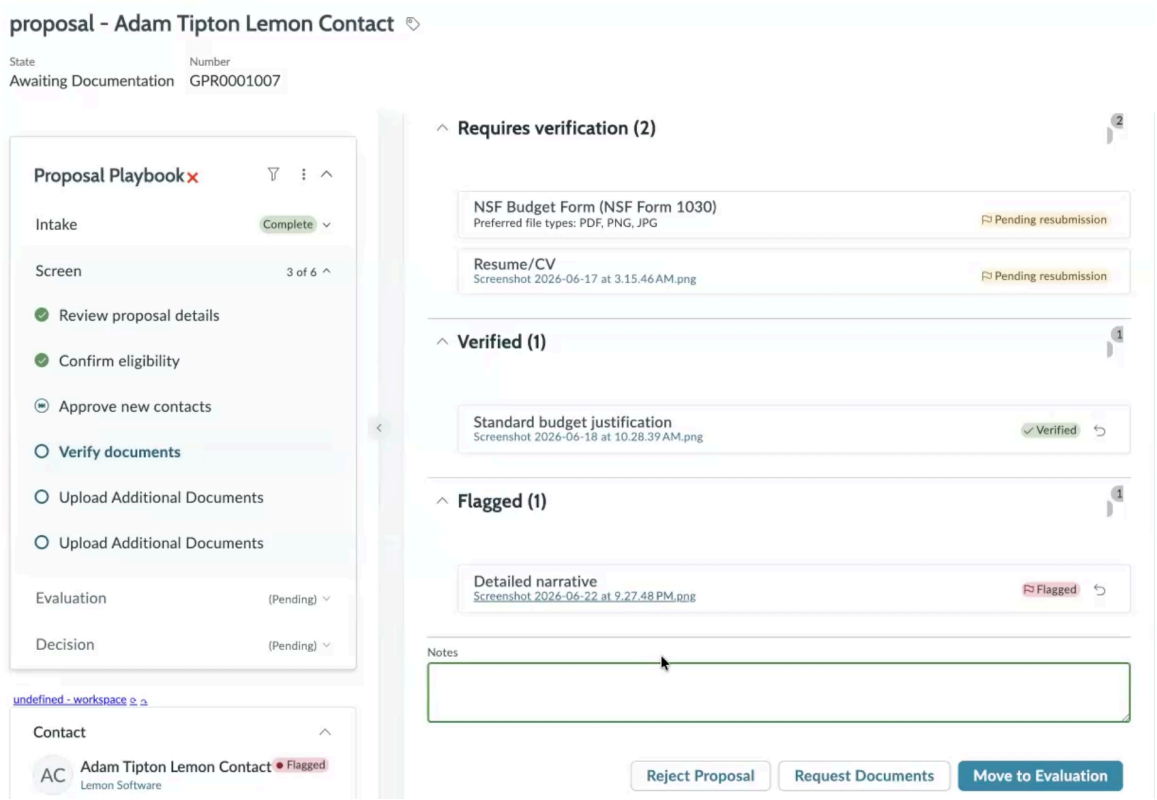
Verify documents uploaded to a grant proposal

Verify all documents the applicant has uploaded with the submitted proposal. Flag documents that don't meet requirements and undo accidental flags. From Grants management version 1.41 onward grant program managers can request corrected documents from applicants.

Before you begin
Role required: sn_svc_appl_pgm_mg.grant_program_manager or sn_svc_appl_pgm_mg.grant_program_director

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About this task



Review and verify the files and supporting documentation attached to the application. You can flag documents for further verification, undo accidental flags, or close the case by moving it to Decision. From Grants management version 1.41 onward grant program managers can request corrected documents from applicants.

Documents are organized into three sections: Requires verification, Verified, and Flagged. Each section displays a count of documents in that state.

Procedure

1. Select each document in the **Requires verification** list to review that the document has all the required details.

   For each document, you can perform one of the following actions:

   - Select the checkmark icon to verify the document. The document moves to the **Verified** section.
   - Select the flag icon to flag the document. The document moves to the **Flagged** section and retains all metadata including file name, size, applicant name, and document type.

2. **Optional:** To reverse an accidental flag, select the reset status icon on the flagged document row in the **Flagged** section to undo the flagging.
   The document moves back to the **Requires verification** section. No file content or metadata is lost. The Flagged count decrements and the Requires verification count increments.

3. **Optional:** To request corrected documents from the applicant, select **Request Documents** at the bottom of the Verify documents screen.

   (Optional) The **Request Documents** button is active only when at least one document is in Flagged status.

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> **Warning:**
>
> Selecting **Request Documents** permanently deletes all flagged documents. This action can't be undone. Before proceeding, verify that you have flagged only the documents that require correction.

(Optional) The following actions occur:

- The flagged documents are permanently deleted and their status changes to Pending resubmission.
- A case task is created and assigned to each applicant who owns a flagged document.
- The applicant receives a notification in the applicant portal about the task to re-upload the document.
- The case state changes to Awaiting Documentation.
- An **Upload Additional Documents** activity is added to the playbook for each applicant with flagged documents.

The Upload Additional Documents activity closes automatically after the applicant uploads the corrected document and marks the activity complete.

4. After all documents have been verified and any flagged documents have been resolved, select **Move to Evaluation** to advance the proposal.

> **Note:**
>
> If documents remain unverified, the playbook does not proceed to the next step and an error appears at the top of the Verify documents activity. Verify that all documents have been reviewed and marked as verified before proceeding.

Result

The playbook moves to the **Evaluation** stage, where the grant program manager can select the merit reviewer group and release the merit review tasks.

Evaluate a grant proposal in the Grants Management Grants Proposal Playbook

Create and assign merit review tasks and allocate budgets and propose funding.

The Evaluation stage of the grants proposal playbook consists of two tasks: **Conduct merit review(s)** and **Build funding proposal**.

> **Note:** From Grants management version 1.31, the **Build funding proposal** activity is renamed to **Funding allocation**.

In the evaluation stage, the grants program manager oversees, tracks, and manages the reviews across the proposal.

In the **Conduct merit review(s)** activity, the grants program manager selects a reviewer group and reviewers and creates merit review tasks for each person in the group. The grants program manager then tracks the reviews across the proposal, monitoring the state, score flag, and the time remaining to complete the review task. When the merit review is complete and the grants proposal is scored and ranked, the merit review activity auto-completes and advances to the **Build funding proposal** activity.

In the **Build funding proposal** activity, the funding information is updated based on the inputs and submissions by the merit reviewers. Grant proposals are compared and budgets are allocated. The grants program manager then either submits funding proposals to the grants

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program director for further approval or declines the proposal with reasons. The status of the proposals is updated to reflect the grants program director's decisions and the applicants are notified about the outcome.

Procedure:

1. Navigate to **All >** > **CSM Configurable Workspace**.
2. Navigate to **Lists >** > **Grant Proposals** and select **My grant proposals**.
3. Select the grant proposal and navigate to **Evaluation**.
4. In the **Conduct merit review(s)** task, select the reviewer group from the drop-down and select **Create Tasks**.

   A review task is created for each of the reviewers from the selected review group. The reviewer groups are created by the grants program manager during the grant setup stage.

5. Review or edit the reviewers and select **Update Review Tasks**.The grants program manager can edit the reviewer group at any time before any one review task is complete.
6. Assign the review tasks and notify the selected reviewers by selecting the review tasks and select**Release Tasks**.

   The state of the selected review tasks is now In progress and the reviewers receive notifications on the Reviewer Service Portal.

7. Review and manage the merit review tasks across the grant proposals by selecting **View all reviewers for this program** and switch to the workspace view by selecting the Record Details icon .
8. Move all the selected review tasks back to Draft state by selecting **Reset State**.

   If a reviewer declines, the grants program manager is notified. The grants program manager can cancel that review and move the task to the next stage, or assign a new review group to restart the review process.

   When all the review tasks are complete, the playbook automatically advances to the Build funding recommendation task.

   The grants program manager can track the progress of the funding status and view requested budget, allocated budget, and the rank based on the merit review scoring.

9. In the **Build funding proposal** task, review and manage the funding proposals by selecting **View funding proposal**.

   All the scored proposals appear in the Funding proposal tab along with the ranks and budget details.

   Note: From Grants management version 1.31, the **Build funding proposal** activity is renamed to **Funding allocation** to support the Rolling grant approvals feature. To allocate budget for the proposals in a rolling grants approval workflow, see Mark proposals.

10. From the list of scored proposals, select one or more proposals to perform either of these actions:
    - Decline funding and provide a reason by selecting **Propose Decline**.
    - View the funding proposal page from where you can allocate budget, submit the proposals, and notify the grant program director for further approval by selecting **Add to Proposal**.
11. As the grants program director, view the funding proposals in the CSM Configurable Workspace by navigating to **List** > **My approvals**.

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12. From the list of available funding proposals, as the grants program director, select one or more proposals to perform either of these actions.
    - Decline funding and provide a reason by selecting **Reject**.
    - Award the grant by selecting **Approve**.

When the grants program director approves the funding proposal, the evaluation stage is complete and the grant proposal advances to the Decision stage.

Related topics

#unique_379

Use Rolling grant approvals

Rolling grant approvals enhance the Grants Management funding workflow. You can propose awards and declines for any scored subset of applications at any time, without waiting for the entire proposal portfolio to complete review.

From Grants Management version 1.31, you can choose to process funding decisions incrementally as proposals are scored, or continue working in the traditional full-portfolio model. Select the **Funding Allocation** tab in the evaluation stage of the Grant management playbook to process funding decisions as proposals are scored.

How rolling grant approvals work

The rolling approval workflow introduces two core capabilities: incremental proposal selection and batch-based Grant Program Director (GPD) approval. Grant program managers (GPMs) don't have to wait for every proposal to complete merit review and scoring before making funding decisions. Grant program managers can select any subset of scored proposals and mark them for funding or decline independently. These tentative funding recommendations are then grouped into a Funding Request — an approval packet that is submitted to the Grant program director for review. The Grant program director can approve, reject, or return the batch, and the Grant program manager can continue working on remaining proposals while previous batches are under review.

Rolling grant approvals support two common program models:

- **Full portfolio**. All proposals are scored before any decisions are made. The grant program manager marks all proposals and submits them in a single Funding Request. This is the traditional workflow and continues to function unchanged.

- **Rolling grants**. Proposals arrive and are scored on a continuous basis. The grant program manager marks and submits proposals in multiple batches over time, each as a separate Funding Allocation Request. Multiple requests can be in different review stages simultaneously.

Spending Overview Widget

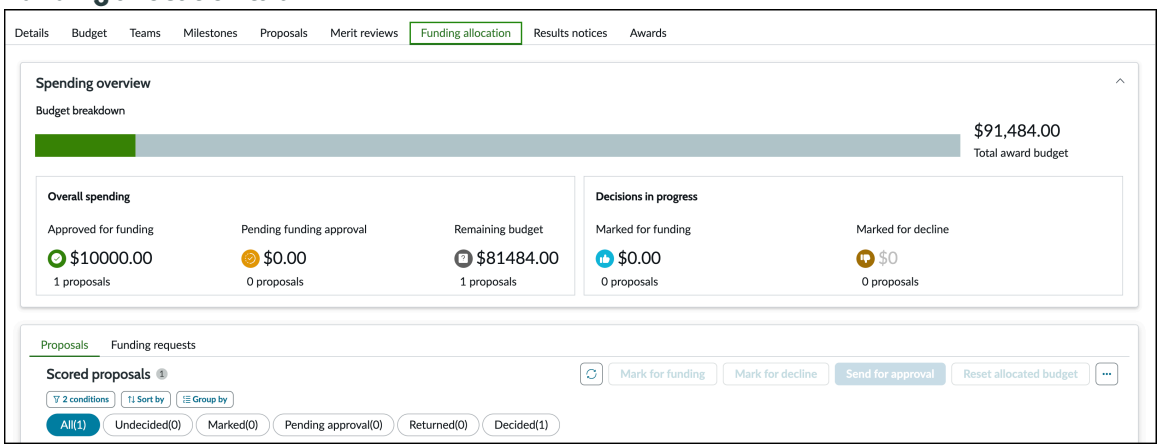
The **Spending Overview** panel on the **Funding Allocation** tab provides real-time budget and decision visibility. The panel contains two chart areas that provide visual breakdowns of the budget and decision metrics. Both chart areas update dynamically as proposals move through the workflow:

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- **Overall Spending**: Displays the total award budget, the committed budget (Approved for Funding), the amount pending director review (Pending Funding Approval), and the unallocated balance (Remaining Budget). A horizontal bar chart following these metrics shows approved funding by applicant type, labeled **Approved for funding by applicant type**.

- **Decisions in Progress**: Displays the grant program manager's funding and decline recommendations the grant program manager has marked but not yet submitted. A bar chart following these metrics shows the funding recommendations by applicant type, labeled **Marked for funding by applicant type**.

Funding allocation tab



The following table describes how budget figures shift as proposals move through each stage of the workflow.

Workflow stage	Budget movement	Proposal Status	Spending Overview effect
Grant program manager marks proposal for funding	Allocated budget moves from **Remaining Budget** to **Decisions in Progress** (Marked for Funding)	Marked for funding	Remaining Budget decreases; Marked for Funding increases
Grant program manager marks proposal for decline	No budget movement. Declined proposals carry no allocated budget.	Marked for decline	Marked for Decline count increases. No budget change.
Grant program manager submits funding request	Allocated budget moves from **Decisions in Progress** to **Pending Funding Approval**	Submitted for funding or Submitted for decline	Marked for Funding decreases; Pending Funding Approval increases
Grant Program Director approves the funding request	Allocated budget moves from **Pending Funding Approval** to **Approved for Funding**. Funds are committed.	Funding confirmed	Pending Funding Approval decreases; Approved for Funding increases

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Workflow stage	Budget movement	Proposal Status	Spending Overview effect
Grant Program Director rejects the funding request	Allocated budget is released from **Pending Funding Approval** back to **Remaining Budget**	Decline confirmed	Pending Funding Approval decreases; Remaining Budget increases

Note:

The Total award Budget shown at the top of the Budget Breakdown bar reflects the full program allocation and does not change during the workflow. Only the segments within it shift as proposals move through the life cycle.

Filter pills

The **Scored Proposals** list on the **Funding Allocation** tab includes a row of filter pills that provide quick-access views of proposals by status. Each pill displays a label and a count in parentheses that updates in real-time.

Filter pill	Statuses included	What it shows
All	All statuses	Every scored proposal in the program. This is the default view. The count shown in parentheses, for example, "**All (12)**" reflects the total number of proposals that have completed merit review and are available for allocation decisions.
Undecided	Undecided	Proposals with no grant program manager recommendation, including proposals returned by the grant program director.
Marked	Marked for Funding; Marked for Decline	All proposals with a tentative grant program manager recommendation that have not yet been submitted for approval.
Pending approval	Submitted for Funding; Submitted for Decline	Proposals submitted to the Grant Program Director as part of a funding request and awaiting a decision. The count reflects all proposals currently in the Grant Program Director's review queue.
Returned	Returned	Proposals sent back by the Grant Program Director for revision. These re-enter the grant program manager's working queue.
Decided	Approved; Declined	Proposals that have reached a final funding decision. Approved proposals have confirmed funding; declined proposals are formally rejected after Grant Program Director review.

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Note:

Admins can add, remove, relabel, reorder chart widgets and filter pills, or create custom ones in the **Spending Overview** panel. The two built-in charts can be hidden or relabeled but not deleted from the system. For more information, see Configure the Spending Overview Widget and Filter pills.

Data model

Rolling grant approvals introduce two new records and extend an existing one.

The **Funding Allocation Review Task** record represents a batch of proposals that the grant program manager has assembled and submitted to the Grant Program Director for review. The record stores the associated grant program and the recommendation reason for the batch. It also tracks the total number of proposals included, counts for funding and for decline, the total allocated amount, and the current state of the review task.

The **Funding Allocation Proposal Mapping** record links an individual proposal to a Funding Allocation Review Task, defining which proposals are part of each batch. When the mapping is active, the proposal is included in the allocation request. When inactive, the proposal has been removed or rejected from it. The Grant Program Director can add comments to each mapping to record the reasons for approving or rejecting a proposal as part of the review.

The existing **Grants Management Case** record gains new fields starting with Grants Management version 1.31. New fields include funding justification, references to the Funding Allocation Review Task the proposal belongs to, and submission counts for funding or decline consideration. A funding status field tracks the proposal's current position in the allocation workflow.

Related topics

- Mark proposals
- Submit a Funding Allocation Request
- Review and Approve a Funding Request
- Release result notices to applicants
- Grant Proposal funding statuses
- Configure the Spending Overview Widget and Filter pills
- Grants Management data model

Mark proposals

Select scored proposals, mark them for funding or decline to the Grant Program Director for approval.

Before you begin

Role required: sn_svc_appl_pgm_mg.grant_program_manager

Use this procedure to select scored proposals and mark them for funding or decline for the approval of the Grant Program Director.

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- The grant program must be in the **Accepting Proposals** or **Active** state.
- Proposals must have completed merit review and scoring. Only scored proposals appear on the **Funding Allocation** tab.
- You must have sufficient Remaining Budget to cover the allocated amounts for proposals you intend to mark for funding.

About this task

Proposals that you mark for funding are in a tentative, reversible state indicating that the Grant Program Manager has flagged a proposal for potential funding. The proposal has not yet been submitted for approval to the Grant Program Director, and you can reverse the recommendation at any time before submitting the funding request. Budget allocated against these proposals appears under **Decisions in progress** in the **Spending Overview** chart segment.

Procedure

View proposals to mark for funding or decline

1. Navigate to **All** > **Public Sector Workspace**.
2. Navigate to **Lists** > **Grant Programs** and select **All**.
3. Open the grant program record for which you want to allocate funding, and select the **Funding Allocation** tab.
4. In the **Scored Proposals** list, select the check box next to one or more proposals with **Undecided** funding status.
5. Select **Mark for funding** or **Mark for decline**.
   For the procedures to mark for funding or decline, see
   - Mark for Funding
   - Mark for Decline

Mark for Funding

Select scored proposals, mark them for funding to the Grant Program Director for approval.

Before you begin

Role required: sn_svc_appl_pgm_mg.grant_program_manager

Use this procedure to select scored proposals and mark them for funding for the approval of the Grant Program Director.

- The grant program must be in the **Accepting Proposals** or **Active** state.
- Proposals must have completed merit review and scoring. Only scored proposals appear on the **Funding Allocation** tab.
- You must have sufficient Remaining Budget to cover the allocated amounts for proposals you intend to mark for funding.

About this task

Proposals that you mark for funding are in a tentative, reversible state indicating that the Grant Program Manager has flagged a proposal for potential funding. The proposal has not yet been

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submitted for approval to the Grant Program Director, and you can reverse the recommendation at any time before submitting the funding request. Budget allocated against these proposals appears under **Decisions in progress** in the **Spending Overview** chart segment.

Procedure

Mark proposals for funding

1. Navigate to **All** > **Public Sector Workspace**.
2. Navigate to **Lists** > **Grant Programs** and select **All**.
3. Open the grant program record for which you want to allocate funding, and select the **Funding Allocation** tab.
4. In the **Scored Proposals** list, select the check box next to one or more proposals with **Undecided** funding status.
5. Select **Mark for Funding** in the toolbar.
6. In the Mark for Funding confirmation dialog, review the number of selected proposals and select **Confirm**.
7. For each proposal marked for funding, enter the recommended award amount in the **Allocated Budget** column.

> **Important:**
>
> The **Allocated Budget** field defaults to zero after marking. You must enter a value before submitting the funding request. Proposals with zero allocation can't be submitted for funding approval.

Mark for Decline

Select scored proposals, mark them for decline to the Grant Program Director for approval.

Before you begin

Role required: sn_svc_appl_pgm_mg.grant_program_manager

Use this procedure to select scored proposals and mark them for decline for the approval of the Grant Program Director.

- The grant program must be in the **Accepting Proposals** or **Active** state.
- Proposals must have completed merit review and scoring. Only scored proposals appear on the **Funding Allocation** tab.

About this task

Proposals that you mark for decline are in a tentative, reversible state indicating that the Grant Program Manager has flagged a proposal for decline. The proposal has not yet been submitted for approval to the Grant Program Director, and you can reverse the recommendation at any time before submitting the decline request.

Procedure

Mark proposals for decline

Proposals that you mark for decline are in the tentative, reversible recommendation state indicating that the GPM has flagged a proposal for potential decline. This recommendation can be reversed before submission to the GPD for review. No budget is allocated against proposals in this state, and their amounts are excluded from the Decisions in progress chart segment.

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1. Navigate to **All** > **Public Sector Workspace**.
2. Navigate to **Lists** > **Grant Programs** and select **All**.
3. Open the grant program record and select the **Funding Allocation** tab.
4. In the **Scored Proposals** list, select one or more proposals with **Undecided** funding status.
5. Select **Mark for Decline** in the toolbar.
6. In the Mark for Decline confirmation dialog, provide a recommendation reason.

   This field is mandatory. The reason you provide is included in the applicant's rejection letter if the decline is approved.
7. Select **Mark for Decline** to confirm.

Note:

Marking a proposal for decline resets any previously allocated budget for that proposal to zero. This action is reversible — you can return the proposal to **Undecided** status before submitting the funding request.

Submit a Funding Allocation Request

Submit a Funding Allocation Request (FR) to the Grant Program Director for approval.

Before you begin

Role required: sn_svc_appl_pgm_mg.grant_program_manager

Use this procedure to submit a batch of proposals to the Grant Program Director for approval.

- The grant program must be in the **Accepting Proposals** or **Active** state.
- Proposals must have completed merit review and scoring. Only scored proposals appear on the **Funding Allocation** tab.
- You must have sufficient Remaining Budget to cover the allocated amounts for proposals you intend to mark for funding.

About this task

Send marked proposals for approval to the Grant Program Director. Budget allocated against the marked proposals appears under **Decisions in progress** in the **Spending Overview** chart segment.

Procedure

Submit a Funding Allocation Request

1. Navigate to **All** > **Public Sector Workspace**.
2. Navigate to **Lists** > **Grant Programs** and select **All**.
3. Open the grant program record and select the **Funding Allocation** tab.
4. Scroll down to the **Proposals** tab, which is selected by default.
5. Select the **Marked** pill to view proposals that are marked for funding or decline.
6. Select the proposals you want to include in this batch.

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You can include both funding and decline recommendations in the same funding request. Review the **Spending Overview** panel to confirm the budget impact of your recommendations before submitting.

7. Select **Send for Approval** in the toolbar.
8. In the submission dialog, enter a recommendation reason that explains your rationale for this batch.

   This recommendation reason is visible to the Grant Program Director during review.

9. Select **Submit**.

   The system creates a Funding Allocation Request record. Proposals marked for funding transition to **Submitted for funding** and proposals marked for decline transition to **Submitted for decline**. The funding request state is set to **Awaiting Approval**. The Grant Program Director is notified in the workspace and by email that a new funding request is ready for review. The **Spending Overview** updates to move the allocated budget from **Decisions in Progress** to **Pending Funding Approval**.

> **Important:**
>
> Once submitted, you can't modify the proposals or budget amounts in the funding request. To make changes, notify the Grant Program Director to reject the funding request from the **Funding Requests** tab.

Result

The funding request appears on the **Funding Requests** tab with a status of Awaiting Approval. You can continue marking and submitting additional proposals in new funding requests while previous funding requests are under review.

Review and Approve a Funding Request

Review and approve Funding Requests submitted by a grant program manager and approve or reject the batch.

Before you begin

Role required: sn_svc_appl_pgm_mg.grant_program_director

- You must be assigned as the approver for the grant program's approval workflow.
- Funding Requests are accessed from the Grants Workspace. Funding requests don't appear in the standard **My Approvals** module.

About this task

When a grant program manager submits a Funding Request, the Grant Program Director is notified in the workspace and by email that a new funding request is ready for review.

Procedure

Review a Funding Allocation Request

1. Navigate to **All** > **Public Sector Workspace**.
2. Navigate to **Lists** > **Funding allocation requests** and select **My requests**.

   Alternatively, open the Funding Allocation Request notification from the notification icon in the menu bar.

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3. Open the funding request you want to review.
4. Review the **Request Info** section, which displays the approver, the current state, and the grant program manager's recommendation reason.
5. Review the **Overview** panel, which displays the Total Program Budget, the Submitted Allocation, the count of proposals recommended for funding, and the count recommended for decline.
6. Review and verify the proposed allocated budget against the requested budget, the applicant type, the final score, and the rank.

Approve the funding request

7. After reviewing all proposals, select **Approve** or **Reject**.

   When you approve a funding request, the funding request transitions to Accepted state. Proposals recommended for funding transition to **Funding confirmed** or **Decline confirmed** and proceed to result notice generation and contracting. Proposals recommended for decline transition to Decline confirmed and proceed to rejection letter generation. Budget figures are updated, where the amounts move from Pending Funding Approval to Approved for Funding in the Spending Overview. The grant program manager is notified and can begin releasing result notices to applicants.

Reject the funding request

8. If you disagree with the grant program manager's recommendations, select **Reject**.
9. In the Activity Stream or Work Notes, you must provide a rejection reason to help the grant program manager understand what to revise.
   When you reject a funding request, the funding request transitions to the Rejected state. All proposals in the batch revert to Returned status, regardless of whether they were on the funding or decline track. The returned proposals remain in the Returned state in the grant program manager's working queue. All budget held against the funding request is released back to Remaining Budget. The grant program manager is notified and can revise recommendations and resubmit in a new funding request.

> **Important:** Rejecting a funding request returns the entire batch. You can't selectively approve some proposals and reject others within the same funding request. If you need partial approval, ask the grant program manager to split the proposals into separate funding requests before submission.

Release result notices to applicants

After the Grant Program Director approves a Funding Allocation Request, release result notices to applicants individually or in bulk.

Before you begin

Role required: sn_svc_appl_pgm_mg.grant_program_manager

Grants Management 1.31 introduces rolling grant approvals. The Grant Program Director can release notices for individual proposals in the **Ready to release** state as soon as they are decided. Proposals don't need to wait for the entire program to complete.

About this task

With rolling grant approvals, you can release result notices for individual proposals as soon as they are decided, without waiting for the entire program to complete. You can also release notices in bulk for all ready proposals at once.

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Note:

Applicants whose result notices have not yet been released see their proposal status as **Decision pending** in the applicant portal. They aren't shown an outcome until you release the result notice.

Procedure

1. Navigate to **All** > **Public Sector Workspace**.
2. Navigate to **Lists** > **Grant Proposals** and select **All**.
3. In the **Create results letter** activity, select **Grant Program view**.
4. Select the **Results notices** tab.

   The scored proposals appear.

5. Select the grant program record for which you want to release the result notice and select **Release Results** to release a result notice for an individual proposal.
   To Release notices in bulk

   a. Select the check box adjacent to the **Proposal** status filter to select all the proposals that are ready to release.

   b. Select **Release Results**.

Result

The result letter is sent to the applicant(s) immediately and the status of that grant program record changes to Closed. In the Proposal playbook, once the letters are released the playbook advances to the **Record outcome** activity while awaiting an applicant response. The resolution code is auto-populated after the applicant accepts the letter.

Propose a Decision for a grant proposal application in the Grants Management Grant Proposal Playbook

Complete the Decision stage as your last step in managing a grant proposal using the Grants Management.

Before you begin

Role required: sn_svc_appl_pgm_mg.grant_program_manager

About this task

Decision consists of two tasks: Create results documents and Record outcome. In the Decision stage, the grants program manager creates letters or document templates that are used to inform applicants of their proposal status, and applicants can view their results and acknowledge or decline the awarded grant.

Procedure

1. Navigate to **All** > **CSM Configurable Workspace**.
2. Navigate to **Lists** > **Grant proposals** and select **My grant proposals**.
3. Select the grant proposal and navigate to **Decision**.
4. In the **Create results letter** task, select the **Results letter** tab and enter the details such as dates, response deadline, and the decision reason.
   The results letters that are selected by the grants program manager during the setup stage are updated and ready to send.

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5. Update the merit review summary by selecting the **Merit review summary** tab.
   Only if a proposal is declined or awarded, the **Merit review summary** is available.
6. Update the selected document templates by selecting **Update document**.
7. Select **Mark complete**.
   The results letters are created and completed and the playbook automatically advances to the **Record outcome** task. The grant proposal moves from the Draft state to the Ready state for release.
8. In the **Record outcome** task, view the list of all the proposals for the grant program along with the task numbers for each of the grant proposal records in the **Result notices** tab by selecting **view program record**.
9. Select **Release Results**.
   You can only release the results if all the grant proposals are in the Ready for release state. The tasks move from the Ready for release state to the Closed state, and an email is triggered to the applicant about the results. The applicant can view the results by logging in to the applicant portal and either acknowledging or declining the award before the deadline.

   In the **Record outcome** task, the resolution code is auto-populated based on the award status such as:

   - Ineligible
   - Declined by agency
   - No response by applicant
   - Award acknowledged
   - Award declined by applicant

   The outcome of the grant proposal is recorded and closed.
10. Enter the resolution notes and select **Close**.

Using Self-Service Portals in Public Sector Digital Services

Use Portals to submit requests for licenses and permits, government records and public information, non-emergency services, or to submit applications for social benefits or grants opportunities.

Using the Government Service Portal in Public Sector Digital Services

By using the Government Service Portal, constituents and businesses can report issues, access and view the status of existing service requests, and request public records. You can also search for information about a question or issue, view and update their contact information, and request assistance from a government service agent— all within a customizable interface.

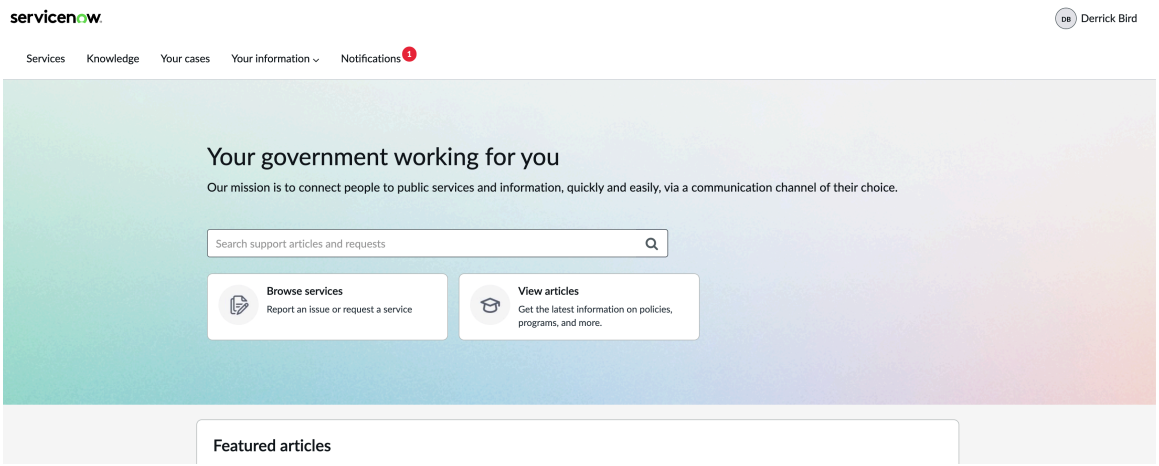
Using the Government Service Portal as a constituent

The Government Service Portal experience begins on the portal home page for constituents. Agencies usually customize their home pages to be viewed by registered users, and users who aren't registered. For example, registered users may see different information on the home page than the users who aren’t logged in.

This example shows an example default home page for a registered user of the Public Sector Digital Services Government Service Portal.

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Government Service Portal default home page (Constituent view)



Constituents on the Government Service default home page can select the following communication options:

1. Browse and request services or information, track cases, view received services, and report issues.
2. Get the latest information on policies and programs by searching and viewing articles.
3. Discuss issues with neighbors and share perspectives by asking the community.
4. View your recent services and see the popular services on the site.

Note: Administrators can customize Government Service Portal home pages in Service Portal, so home pages may differ visually across government agencies. For more information on customization, see Customize the Government Service Portal.

The following table lists what constituents can access through the home page.

Government Service Portal home page for registered constituents

UI component	Description
Knowledge	Access the Knowledge home page and search or view a list of the top-rated or most viewed knowledge base articles.
Services	Find all available services in the catalog. They can search through the service catalog or view a list of the recently used or most popular catalog items.
Your Cases	Find all cases submitted under the constituent name.
Your Information	Access quick links to view, update, or add personal information: • Businesses (agent experience only) • Contacts (agent experience only) • Publications
Notifications	See notifications for resolved cases, cases awaiting information, publications, and approvals.
Tours	View additional guidance on how the Public Sector Digital Services application works. An administrator determines whether tours appear on pages.

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Government Service Portal home page for registered constituents (continued)

UI component	Description
Live Chat	Chat with a virtual agent or a government service agent. For more information on using Virtual Agent to get help, see Get help with Public Service requests using Virtual Agent.
Engagement Messenger	Use Engagement Messenger to submit service requests from a third-party web application outside of the ServiceNow environment. For more information, see Configure Engagement Messenger for Playbooks.
Profile menu	Access a profile photo, view the profile, or log out.
Search	Search the portal by either entering a keyword to use type-ahead search, or enter one or more words to view all search results.
Most viewed articles	View a list of the most viewed articles.
Featured articles	View featured community content.
Most useful articles	View the most useful knowledge articles by the usage count of the articles.

Unregistered constituents can do the following tasks in the Government Service Portal:

- Register as a new user, create a login, and create a user profile.
- Search for information, browse knowledge articles, and engage with the community.
- Get help using Virtual Agent.
- Request services such as street repair, trash removal, building inspections, and other public maintenance.
- Request information and public records from local, state, and federal public agencies.

After registering and logging in to the Government Service Portal, constituents can:

- View the services that they received.
- View information records that they requested.
- View all license or permit requests.
- View constituent profiles (includes household information, such as names, addresses, and other constituent information).
- View existing cases.
- View publications and notifications including government pamphlets and newsletters about services as well as government notifications.

For more information on the services that are offered in the Government Service Portal service catalog, see Government Service Portal service catalog.

Using the Government Service Portal as a business

The Government Service Portal enables businesses to access their cases and service information as well as report issues. Business or business contacts can use the Government Service Portal to view their submitted cases, and raise requests by using the service request catalog.

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Business contacts have the same functionality as a constituent user, with a few additional permissions. In addition to the constituent user tasks, business contacts can do the following tasks in the Government Service Portal:

- Register a new business.
- Request services that are related to licenses, benefits, permits, and service requests.
- View the services that they received.
- View information records that they requested.
- View all license or permit requests.
- View items that they received.
- View their existing cases.
- View business and child business profiles.
- View business contact information such as names, addresses, and other contact information.
- View publications, such as government pamphlets and newsletters about services.
- View notifications such as government notifications and new contact approvals.

Customizing the Government Service Portal

To customize this portal, navigate to **Service Portal** > **Portals** and select Government Service. See Service Portal for more information about creating a custom interface.

Register for the Government Service Portal as a constituent, business contact, or user

Register for the Public Sector Digital Services Government Service Portal so that you can search for information, request assistance from a government service agent, apply for a grant, license, or permit, or track the status of your request.

Before you begin

Role required: none

Procedure

1. Navigate to the Government Service Portal.
2. In the portal header, select **Register**.

   Note: Public Sector Digital Services does not support configuring of external user self-registration.

3. Select whether you want to register as a **Constituent**, a **Business contact**, or a **Business**.
4. Fill in the fields on the registration form.
   Your email address must be unique. If you enter an address that is already in the system, you receive an error message. Try again with a different email address.
5. Select the **Security Code** check box, complete the CAPTCHA validation, and select **Verify**.
6. When prompted to agree to the privacy policy and to the community terms and conditions, select the agree check box.
7. Select **Sign Up**.
   A verification email is sent to the email address that you provided.
8. Select the link in the email to verify your email address.

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Result
Your registration is complete. You can now log in to the Government Service Portal.

Self-register a business account in the Public Sector Digital Services government service portal

As a business owner, you can self-register your business on the government service portal to gain access and to create a business profile.

Before you begin
Role required: none

Procedure
1. Go to the Government Service Portal page and select **Register** in the portal header.
2. When prompted, select **A new business**.
3. On the form, fill in the fields.
   For more information on the business registration fields and the information that is collected when you sign up as a new business, see Business Profile form.
4. Select the **Security Code** check box, complete the CAPTCHA validation, and select **Verify**.
5. Agree to the privacy policy and to the community terms and conditions by selecting the check box.
6. Select **Register**.
   Your request is routed to an administrator, who can approve or deny the registration request. If the registration request is approved, you receive an email prompting you to set a user ID and password for login to the government service portal. If the registration request is denied, you're notified by email.

View or update a constituent profile in the government service portal

As a registered constituent, view your profile, update your information, and change your password directly on the Public Sector Digital Services government service portal.

Before you begin
Role required: sn_gsm.constituent

Procedure
1. Log in to the government service portal.
2. Select your user name in the portal header and select **Profile**.
3. To update the personal information in your profile, including your name, contact information, and address, do the following steps:
   a. Select the field that you want.
   b. In the pop-up window, enter the new information.
   c. Select **Save**.
   For more information on the fields, see Constituent Profile form.
4. To change your password, select **Change Password**.
   The **Change Password** link appears on the government service portal profile only when the Self Service Password Reset plugin (com.snc.password_reset) is activated by an admin.
5. In the Change Password pop-up window, fill in the fields and select **Update**.

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6. To manage your email notification preferences, select **Notification Preferences** and check the options that you want or clear the options that you don't want.
   Your preferences are automatically saved.

Track your cases from the Government Service Portal in Public Sector Digital Services

Track your service request, information request, or license/permit request cases in the Government Service Portal by viewing a list of your cases and selecting the ones that you want to see more details about. Here, you can respond to an agent's inquiry, view a response, or see if there are any next steps required to resolve the case.

Before you begin

Role required: sn_gsm.constituent

About this task

Selecting a case opens a form with the following sections:

- A record of activity on the case, including added attachments or any interactions between the requester and the license and permit request case agent.
- Tasks or actions that must be taken on the user's part, such as accepting or rejecting a case outcome.
- The case details, including contact information, the case number, and the case's stage and status.
- Any attached files.

Procedure

1. In the Government Service Portal portal header, navigate to **Your Cases**.
   The following table lists the case categories that are visible:

Your Cases Category list

Category	Description
All Cases	List of all cases.
Action Needed	Cases in the Resolved state that are awaiting a constituent response.
Your Cases	Cases that haven’t yet been submitted for resolution.
Your Requests	Cases that have been submitted for resolution and are awaiting an agent response.
Your Service Requests	All service request cases that a user has access to. The Service Requests list shows the following fields: ○ Service Request Number ○ Short Description ○ Constituent, Business, or Business Contact ○ State ○ Reported on

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Category	Description
Your Information Requests	All information request cases that a user has access to. The Information Requests list shows the following fields: ○ Information Request Number ○ Short Description ○ Constituent, Business, or Business Contact ○ State ○ Reported on
Your Licenses/Permits	All license and permit request cases that a user has access to. The License and Permit Requests list shows the following fields: ○ License and Permit Request Number ○ Short Description ○ Consumer, Business, or Business contact ○ State ○ Reported on

2. In your list of cases, select the case number that you want to view more information about.
3. **Optional:** If you want to add a message for an agent, enter the message, and select **Post**. Your message becomes part of the case conversation. All responses from the agent are also included in the conversation, and you can see responses from other agents here.

Submit a social benefits application in the Public Sector Digital Services Government Service Portal

Submit an application for one or more social benefit programs offered by a government agency using the Government Service Portal in Public Sector Digital Services.

Before you begin
Role required: none

About this task
As a constituent, you can use the Public Sector Digital Services playbooks on service portals experience in the Government Service Portal to apply for one or more social benefit programs offered by an agency that serves you. You can apply for more than one program using information from the primary application, and see if you are eligible for any additional programs based on the information you provide, depending on what the agency offers. You can also use the portal to view the status of existing applications, view your constituent benefits summary card, as well as add details, upload documents, or update your profile and contact information.

Before you begin
Role required: none

Procedure
1. Navigate to the Government Service Portal.
2. Navigate to **Services** > **Social Benefits**.
3. Select the social benefits program you would like to submit an application for.

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4. On the Answer eligibility questions activity card, confirm the primary applicant's eligibility using the eligibility questions, and select **Check Eligibility**.
   The benefits card will display possible eligibility for each of the social benefits offered by the agency. An agent will review the details of your case to make a final determination.
5. If the applicant is deemed eligible for the benefit associated with the application currently open, select **Start Application**.
   If the applicant is not eligible for the benefit associated with the application currently open, the application cannot move forward. The benefits card displays other social benefit programs the applicant may be eligible for, in addition to or instead of the benefit associated with the application currently open.
6. **Optional:** If you are submitting this application on behalf of another constituent or for a business contact, select the checkbox for **I am requesting on behalf of someone else**.
7. On the form, fill in the fields with the primary applicant's personal and financial information, including SSN, demographic information, location, and contact information.
8. **Optional:** Select the checkbox to indicate that the applicant would prefer to be contacted via SMS.
9. Select the next activity.
10. **Optional:** Add any people who would also be receiving benefits along with the primary applicant.
    You may add more than one. Related people may include spouses, children, dependents, household members, or any person who may be receiving benefits along with the primary applicant.
11. Select the next activity.
12. **Optional:** If anyone in the applicant's household has a source of income, select **Yes**, and on the form, fill in the fields.
    If no one in the applicant's household has a source of income, select **No**.
13. **Optional:** If anyone in the applicant's household has any pre-tax contributions on any of their current income, select **Yes**, and enter any pre-tax contributions that affect income for the applicant's household.
    If no one in the applicant's household has any pre-tax contributions, select **No**.
14. Select the next activity.
15. **Optional:** If anyone in the applicant's household has any expenses or financial commitments, select **Yes**.
    If no one in the applicant's household has any expenses or financial commitments, select **No**
16. **Optional:** On the form, fill in the fields, doing so for each expense item.
    You may add more than one. Select **Add Item** to add multiple expenses to the list.
17. Select the next activity.
18. If anyone in the applicant's household has any financial accounts, assets, or resources, select **Yes**, and on the form, fill in the fields.
    You may add more than one. Select **Add Item** to add multiple expenses to the list. If no one in the applicant's household has any financial accounts, assets, or resources, select **No**.
19. Select the next activity.
20. Upload any supporting documents that verify the identity of the applicant and any related parties, or provide additional context for their request.
21. Select the next activity.
22. On the form, select the options that best describe the applicant's criminal history, communication preferences, and accessibility needs.

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23. Select the next activity.
24. Review the application in its entirety and correct any errors before submitting the application, and select **Mark Complete**.
    Select the pencil icon to navigate back to an activity that needs to be corrected.
25. Select the checkbox to acknowledge you have read and agree with the disclosures, and enter your signature.
    If an admin has configured e-signature, you have the option of drawing or typing a signature.
26. Select **Submit**.
    Your request is now routed to a Social Benefits case agent, who will process your application. You're now taken to the case page, where you can review or update the details of your request. After your request has been fulfilled, you must return to the portal to verify information, confirm an interview date, or upload any additional documents needed to fulfill your request. You can access pending approvals and tasks on the Notifications tab.
27. **Optional:** Select **Apply Now** to use information from the current application to apply for other social benefits programs that the primary applicant may be eligible for.
    You may apply for more than one. Each new application opens in a new browser tab. The option to create an appended case expires after a specified amount of time.
28. **Optional:** Select **Skip** to skip this activity.
    The case state of the additional benefit application changes to "Not submitted". A new case can no longer be created and appended to the primary application.
29. Select **Mark Complete** once the desired applications are submitted.
    The case is moved to the **Review** stage, where an agent will review the details of your request.

Creating a government service request with Public Sector Digital Services

You can create a case about a community question or issue from the Government Service Portal in Public Sector Digital Services. The Government Service Portal supports submissions by both registered and anonymous users.

Before you begin

Role required: none.

About this task

Constituents can use the Government Service Portal to request services and report issues in their community. They can also use the portal to view the status of existing service requests, as well as update their contact information.

Constituents can submit their non-emergency requests through the Government Service Portal self-service experience, through Virtual Agent, or using Engagement Messenger. For more information on using Virtual Agent with Public Sector Digital Services, see Get help with Public Service requests using Virtual Agent.

Create a service request as a registered user

Create a service request as a registered user in the Public Sector Digital Services application.

Before you begin

Role required: constituent, business_contact, business_partner

About this task

As a constituent, you can use the Government Service Portal to request services and report issues in their community. You can also use the portal to view the status of existing service requests, as well as update their contact information.

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As a constituent, you can submit non-emergency requests through the Government Service Portal self-service experience, through Virtual Agent, or by using Engagement Messenger. For more information on using Virtual Agent with Public Sector Digital Services, see Get help with Public Service requests using Virtual Agent.

Procedure

1. Navigate to the Government Service Portal.
2. Select **Services** > **Service Requests** to expand the list of Service Requests categories that are offered by Public Sector Digital Services, and select the category that you want.
3. Select the Service Request issue that you want to report.
   For more information on the services that are offered in the Government Service Portal, see Government Service Portal service catalog.
4. On the form, fill in the fields.

Create Case form

Field	Description
Location Type	Location type of the service request. The choices are: ○ **Address** ○ **Intersection**
Street Address	Address for this case, if **Address** is selected as the location type.
First Cross Street/Second Cross Street	Cross-streets for the case, if **Intersection** is selected as the location type.
Short Description	Brief description of the question, issue, or problem.
Details	Detailed description of the question, issue, or problem.
Contact Information	Contact information for the business or individual who reported this case.

5. Add any attachments.
6. Select **Submit**.

Result

The case is created, assigned a case number, and is now viewable in the **Your Cases** list in the Government Service Portal. For information on how to track the case as it moves through the various stages, see Track the status of a public service request from the Government Service Portal.

Create a service request as a public user

Create a service request as a public user in the Public Sector Digital Services application. You can submit a service request anonymously without logging in to the application.

Before you begin

Role required: none

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About this task

Note: To allow public users to submit service requests, certain settings must be configured by an administrator. For more information on how an administrator might configure these settings, see Unauthenticated users cannot submit catalog items on Service Portal.

Organizations usually customize their landing pages, and anonymous users may see different information than users who are logged in.

Procedure

1. Navigate to the Government Service Portal.
2. On the portal header, select **Services**.
3. Expand the list of Service Requests categories offered by Public Sector Digital Services by selecting **Service Requests**, and select the category that you want.
4. Select the Service Request issue that you want to report.
5. On the form, fill in the fields.

Create Case form

Field	Description
Location Type	Location type of the service request. The choices are: ○ **Address** ○ **Intersection**
Street Address	The address for this case, if **Address** is selected as the location type.
First Cross Street/Second Cross Street	The cross-streets for the case, if **Intersection** is selected as the location type.
Short Description	Brief description of the question, issue, or problem.
Details	Detailed description of the question, issue, or problem.
Contact Information	Option to report this case as a business or as an individual.

Note: You may choose to leave the Contact Information fields blank, or you may add your email to receive updates on the case status. Adding attachments isn't supported as a public user.

6. Select the Security Code check box, complete the CAPTCHA validation, and select **Submit**. You're taken back to the service request catalog, where you can submit another service request or register for an account.

Note: If you didn't provide any contact information, you can't track the status of this request or see the details of the case after you select **Submit**. If you would like to check the status of this request after your submit it, you must register for an account. For instructions, see Register for the Government Service Portal as a constituent, business contact, or user.

Create an information request with Public Sector Digital Services

Create a case requesting public records from federal or state public agencies from the Government Service Portal in Public Sector Digital Services.

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Before you begin
Role required: constituent, business_contact, business_partner

About this task
As a constituent, you can use the Government Service Portal to request and obtain copies of public records maintained by government agencies. For example, you can request access to state or local public records such as inspection reports, financial reports, corporate and property records, adoption records, and birth, death, or marriage certificates. You can also use the portal to view the status of existing information requests, as well as add details, upload documents, or update your contact information.

Users can submit a request for any public record, so long as it does not fall under one of nine exemptions:

1. Exemption One: Classified national defense and foreign relations information.
2. Exemption Two: Internal agency personnel rules and practices.
3. Exemption Three: Information that is prohibited from disclosure by another federal law.
4. Exemption Four: Trade secrets and commercial or financial information obtained from a person that is privileged or confidential.
5. Exemption Five: Inter-agency or intra-agency memoranda or letters that are protected by legal privileges.
6. Exemption Six: Personnel, medical, financial, and similar files the disclosure of which would constitute a clearly unwarranted invasion of personal privacy.
7. Exemption Seven: Certain types of information compiled for law enforcement purposes.
8. Exemption Eight: Records that are contained in or related to examination, operating, or condition reports prepared by, on behalf of, or for the use of any agency responsible for the regulation or supervision of financial institutions.
9. Exemption Nine: Geological and geophysical information and data, including maps, concerning wells.

Procedure
1. Navigate to the Government Service Portal.
2. Navigate to **Services** > **Information Requests**.
3. Select the desired type of information request.
   You can choose between a FOIA request (federal) or a Public Records request (state).
4. Fill in your contact information.
   If you're requesting information for someone else, select the **Requesting on behalf of someone else** check box.
5. Fill in the request details.
6. Fill in the fee details.
7. Request a fee waiver by selecting the **Fee Waiver** check box.
   You may qualify for a fee waiver if you're making a request on behalf of a non-profit or educational institution.
8. **Optional:** If you need to request expedited processing, select the **Expedite Processing** check box.
9. **Optional:** Add any attachments, such as documentation required to verify your identity. Required attachments vary by request.
10. Select **Submit**.

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You're now taken to the case page, where you can review or update the details of your request. On this page, you can view the exemption checklist, which is a list of categories of information that are not available due to regulatory reasons. After your request has been fulfilled, you must return to the portal to accept or reject the fee estimate for fulfilling your request. You can access pending fee approvals on the **Notifications** tab.

Create a license or permit request in the Public Sector Digital Services Government Service Portal

Request a license or permit from a government agency using the Government Service Portal.

About this task

With Public Sector Digital Services playbooks on service portals, you get step-by-step guidance through the case flow process and the contextual information you need to complete each stage of the flow and its associated activities. The portal will also allow you the opportunity to see how pricing and fees change based on your selections.

Before you begin

Role required: none

About this task

As a constituent, you can use the Government Service Portal to request a permit or license. You can also use the portal to view the status of existing license and permitting requests, as well as add details, upload documents, or update your profile and contact information.

Before you begin

Role required: none

Procedure

1. Navigate to the Government Service Portal.
2. Navigate to **Services** > **License & Permits**.
3. Select **Request License/Permit**.
4. If prompted, confirm eligibility.
5. On the form, fill in your contact information and the request information.
   If the name to appear on the permit differs from that of the requester, enter that name here.
6. **Optional:** If you are submitting this application on behalf of another constituent or for a business contact, select the checkbox for **I am requesting on behalf of someone else**.
7. **Optional:** In the Individual Type dropdown, select **Constituent**or **Business**.
8. **Optional:** Enter the name of the constituent or business you are submitting the application on behalf of.
9. **Optional:** Add any additional related parties.
   Related parties may include business partners, managers, or any business contact who may need access to this license/permit. They must be contacts already registered and associated with your business.
10. **Optional:** Upload any documents that verifies the identity of the requester and the related party, or provides additional context for your request.
    Required documentation varies by request.
11. **Optional:** Select any add-ons, such as permit endorsements.
    You may add more than one. The pricing of the license or permit varies with each selection or combination of selections. If you are fee exempt, select the **Request Fee Waiver** checkbox to claim an exemption.
12. Review the fees associated with your choices.

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The fee total changes dynamically based on the options selected.

13. Select the checkbox to acknowledge the Commercial Affidavit and DDR Affidavit.
14. Enter your signature.
    If an admin has configured e-signature, you have the option of drawing or typing a signature.
15. Add any attachments.
16. Select **Submit**.

Result

Your request is now routed to a License and Permit agent, who will process your request. You're now taken to the case page, where you can review or update the details of your request. After your request has been fulfilled, you must return to the portal to accept or reject the fee estimate for fulfilling your request, as well as upload any identification or supporting documents needed to fulfill your request. You can access pending approvals and tasks on the Notifications tab.

Related constituents and business contacts added to the license/permit application are now able to view the case details in the Government Service Portal.

Create and submit License or Permit request applications on behalf of others

In the Government Service Portal, constituents can create license/permit requests on behalf of someone else, and add multiple parties (constituents, business contacts) to the watchlist.

Before you begin

Role required: none

Procedure

1. Navigate to the Government Service Portal.
2. Navigate to **Services** > **License & Permits**.
3. Select **Request License/Permit**.
4. If prompted, confirm eligibility.
5. On the form, fill in your contact information and the request information.
   If the name to appear on the permit differs from that of the requester, enter that name here.
6. Select the checkbox for **I am requesting on behalf of someone else**.
7. In the Individual Type dropdown, select **Constituent** or **Business**.
8. Enter the name of the constituent or business you are submitting the application on behalf of.
9. **Optional:** Add any additional related parties.
   Related parties may include business partners, managers, or any business contact who may need access to this license/permit. They must be contacts already registered and associated with your business.
10. **Optional:** Upload any documents that verifies the identity of the requester and the related party, or provides additional context for your request.
    Required documentation varies by request.
11. **Optional:** Select any add-ons, such as permit endorsements.
    You may add more than one. The pricing of the license or permit varies with each selection or combination of selections.
12. Review the fees associated with your choices.
    The fee total changes dynamically based on the options selected. If you are fee exempt, select the **Request Fee Waiver** checkbox to claim an exemption.
13. Select the checkbox to acknowledge the Commercial Affidavit and DDR Affidavit.

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14. Enter your signature.
    If an admin has configured e-signature, you have the option of drawing or typing a signature.
15. Add any attachments.
16. Select **Submit**.

Result

Your request is now routed to a License and Permit agent, who will process your request. You're now taken to the case page, where you can review or update the details of your request. After your request has been fulfilled, you must return to the portal to accept or reject the fee estimate for fulfilling your request, as well as upload any identification or supporting documents needed to fulfill your request. You can access pending approvals and tasks on the Notifications tab.

The constituent for which you were acting as a proxy, as well as any related constituents and business contacts added to the license/permit application, is now able to view the case details in the Government Service Portal.

Track the status of a public service request from the Government Service Portal

Monitor the status of a case that you submitted through the Government Service Portal in Public Sector Digital Services. On the case page, you can see when the case was created, when it was last updated, and whether it's awaiting a response from you or from an agent.

Before you begin

Role required: constituent, business_contact, business_partner

Procedure

1. Navigate to the Government Service Portal.
2. In the Government Service Portal header, select **Your Cases**.
   The following table lists the case categories that are visible:

Your Cases Category list

Category	Description
All Cases	List of all cases.
Action Needed	Cases in the Resolved state that are awaiting a constituent response.
Your Cases	Cases that haven't yet been submitted for resolution.
Your Requests	Cases that have been submitted for resolution and are awaiting an agent response.
Your Service Requests	All service request cases that a user has access to. The Service Requests list shows the following fields: ○ Service Request Number ○ Short Description ○ Constituent ○ Business ○ Business Contact

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Category	Description
	○ State ○ Reported on

3. Under **Your Cases**, select the case number that you want.
The following table describes the fields that are displayed:

Government Service Portal Case Fields

Fields	Description
Timeline	Visual display that shows when the case was created and when it was last updated.
State	Current status of the case for the given stage. For a detailed explanation of each case state, see Government Service Portal Case states.
Constituent, Business, or Business Contact	Contact information for the reporting party.
Service	Type of service being requested.
Stage	Phase through which a case moves. For a detailed explanation of each case stage, see Government Service Case type.
Location Type	Option that indicates whether the location of the issue is an address or intersection.
Address or Cross Streets	Address or cross streets where the issue is located.
Related tabs	Additional case information, activity, or comments. The Related tabs show the following fields: ○ Activity ○ Attachments ○ Related Tasks You can add attachments or comments here.

Manage your government service cases from the Government Service Portal

Create, accept, assign, escalate, de-escalate, cancel a case, and even more actions for various government services all from the Government Service Portal.

Before you begin

Role required: sn_gsm.constituent_agent, sn_gsm.business_agent, sn_gsm.agency_agent, sn_gsm.relationship_agent, and sn_gsm.service_manager

Procedure

1. Navigate to the Government Service Portal.
2. Do one of the following actions that are related to your case:

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Service Request Case Actions

Action	Description
Create Case	Creates a case and associates the new case with the originating case. The new case appears in the Related Cases related list. This action displays the Select Case Type pop-up window where you can select the type of case to create.
Accept	Accepts an assigned case. This action is performed by the logged-in user.
Assign to me	Assigns the case to the logged-in user. This action is available if the case is unassigned and the logged-in user has the correct role.
Compose Email	Opens an email window in a new sub-tab on the **Case** tab. ○ The **To** field displays the customer's email address. ○ The **Subject** field displays the case number and issue. This action is available from the **More UI Actions** menu.
Escalate Case	Escalates the case, which highlights the case and raises awareness about a customer or issue. This action is available if the logged-in user has the correct role.
De-escalate Case	De-escalates a case. This action is available if a case has been escalated and the logged-in user has the correct role.
Report Knowledge Gap	Opens a knowledge feedback task in a new sub-tab for the case. After being saved, the task appears in the Knowledge Gaps related list. This action is available from the More UI Actions menu.
Propose Solution	Enables the agent to propose a solution for a case.
Record Time	Records the time worked for the case or case tasks. Selecting **Record Time** opens a Time

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Action	Description
	Worked form with the **Task** and **User** fields already populated. This action is available from the More UI Actions menu.
Create Work Order	Creates a work order for the case. After a work order is created, it appears in the Work Orders related list. The case number is also referenced on the work order. This action is available from the More UI Actions menu.
Close Case	Closes a case. This action is available after a resolution code and any information related to the closure is provided in the Resolution notes field.
Open case	Changes the state of a case from Awaiting Info to Open.
Submit application	Saves the application and moves the state of the case from Draft to New. This action is available when the state of a case is Draft.
Request Info	Requests information about a case or case task from the constituent, business, or agency. This action is available when the state of a case is not Draft, Resolved, Closed, or Cancelled.
Start Work	Begins work on an open case. This action is available to the agent who is assigned to the task when the state of a case is Open.
Cancel	Updates the state of the case to Cancelled. This action is available when the state of a case is not Resolved, Closed, or Cancelled.

These actions are inherited by the case types that are created by extending the service case type.

The actions in the following table are available with the cases when the corresponding plugins are activated.

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Actions available with corresponding case plugins

Plugin	Action
Service Management	○ Create Incident ○ Create Standard Change ○ Create Problem
Major Case Management	Shows all major case actions.
Special Handling Notes	Shows any special handling notes for the case.
Case Action Status	Indicates the current action state.

Email notifications for the Service Request Case Type

Email notifications are automatically triggered by both the Government Service Portal and Service Request Playbook in Public Sector Digital Services. Notifications can result from an agent action, a response needed from an agent, constituent, or business contact, or from an update on a case status.

Email notifications in the Service Request Playbook are automatically sent to the constituent, business, agency, or contributor watchlist, when an agent performs one of the following case activities:

- Opens a case for a constituent
- Comments on a constituent's case
- Moves the case to another stage
- Provides a resolution for a constituent's case
- Closes a constituent's case
- Cancels a constituent's case
- Requests more information on the unresolved case

Email notifications are automatically sent to the assigned agent when:

- A case is assigned to the agent.
- A case needs attention or requires an agent response.
- Case work notes or comments are updated.
- A case task is assigned.
- There’s new activity on the case.
- The proposed solution is rejected.
- There’s a service level agreement (SLA) warning or breach.

Business contacts, contributors, other agents, and other constituents that are added to the case watchlist should receive all email notifications that are also received by the constituent who submitted the request.

For agents, email notifications in the Government Service Portal or Service Request Playbook can also be triggered by certain SLAs. For more information on SLAs for agents, see Service level agreements for government service cases.

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Service level agreements for government service cases

A service level agreement (SLA) is a record that you use to guarantee a specific time that a service or information must be provided by, or that an agent must finish a task must by. The Public Sector Digital Services application uses SLAs with government service request cases.

You can attach an SLA to a service request in the Government Service Portal or to a service request in the Service Request Playbook. You can configure an SLA to start, pause, or stop depending on any government service case attributes that you or someone else assigned to the SLA.

An SLA is automatically associated to a case when the case is created or updated depending on the conditions that have been set up in the SLA definition. The specific record that gets attached to a case is the Task SLA record, which tracks the SLAs for that particular case. The Task SLA table [task_sla] stores the Task SLA records. For more information on SLA definitions, see Service Level Agreement (SLA) definition.

An SLA sends notifications at certain events that are defined in the workflow. For information on defining SLA workflow events, see Create an SLA definition.

By default, SLA notifications are triggered and sent to the assigned agent on the following occasions:

- A Service Request case is in the Intake stage for more than two days.
- A Service Request case is in the Review stage for more than eight days.
- A Service Request case is in Processing stage for more than eight days.
- A Service Request case is in the Decision stage for more than two days.
- A constituent's comment or query hasn't been responded to for two days.
- An SLA is at 50 percent of the duration that is specified in the SLA definition.
- An SLA is at 75 percent of the duration that is specified in the SLA definition. A notification is sent to the agent and agent manager.
- An SLA is breached. A notification is sent to the agent and agent manager.

An SLA's timer pauses when the case is awaiting information from the constituent who had a comment or query. The timer is canceled if the state of the case changes to **Closed** or **Cancelled**.

To learn more about SLAs, see Service Level Management concepts.

Get help with Public Service requests using Virtual Agent

Public sector users can get assistance completing or updating their requests for various public services by using a pre-built Virtual Agent chatbot conversation. Users can run this Virtual Agent conversation from the Government Service Portal or from Engagement Messenger. Virtual Agent is currently supported by Service Request Playbook and License and Permit Playbook.

Note: Requires Glide Virtual Agent (com.glide.cs.chatbot) plugin.

Get help with service requests using Virtual Agent

Public sector end users can get assistance completing or updating non-emergency service requests by using a pre-built Virtual Agent chatbot conversation. End users can run this Virtual Agent conversation from the Government Service Portal or from Engagement Messenger.

Before you begin

Role required: constituent, business_contact, business_partner

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About this task
The information (user inputs and bot responses) exchanged during the Virtual Agent conversation, Create a Service Request, enables the chatbot to assist users with non-emergency service requests.

Procedure
1. Navigate to the Government Service Portal or to the Engagement Messenger module if implemented.
2. Click **Chat**.
3. Select **Show me everything**.
4. Create or update a non-emergency service request by selecting **Create a Service Request**.

   Virtual Agent asks the user whether this is a new request or an update to an existing request.
   - For new requests, the bot displays categories of non-emergency services that the user can choose from.
     - If the user needs a service that isn't offered, the user can enter a short description of the issue and continue working with the bot to create a service request.
     - If the issue requires a location to be specified, the bot prompts the user to enter the address or intersection of the issue.
   - For existing requests, the bot displays the list of cases for service requests submitted by the user and then prompts the user to update the case by adding an image or comment about the case.

   The bot creates or updates the case for the service request. The user can continue working on a different issue with the bot or indicate that no further help is needed, which ends the Virtual Agent conversation.

Get help with license and permit requests using Virtual Agent

Public sector users can get assistance completing or updating their requests for license and permit services by using a pre-built Virtual Agent chatbot conversation. Users can run this Virtual Agent conversation from the Government Service Portal or from Engagement Messenger.

Before you begin
Role required: constituent, business_contact, business_partner

About this task
The information (user inputs and bot responses) exchanged during the Virtual Agent conversation, Create a Service Request, enables the chatbot to assist users with non-emergency service requests.

Procedure
1. Navigate to the Government Service Portal or to the Engagement Messenger module if implemented.
2. Click **Chat**.
3. Select **Show me everything**.
4. Create or update a license or permit request by selecting **Start a License/Permit Application**.

   Virtual Agent asks the user whether this is a new request or an update to an existing request.

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- For new requests, the bot displays categories of license and permit services that the user can choose from.
  - If the user needs a service that isn't offered, the user can enter a short description of the issue and continue working with the bot to create a request.
  - If the issue requires a location to be specified, the bot prompts the user to enter the address.
- For existing requests, the bot displays the list of license and permit requests submitted by the user, and then prompts the user to update the case with an image, comment, file, or additional information.

The bot creates or updates the case for the license and permit request. The user can continue working on a different issue with the bot or indicate that no further help is needed, which ends the Virtual Agent conversation.

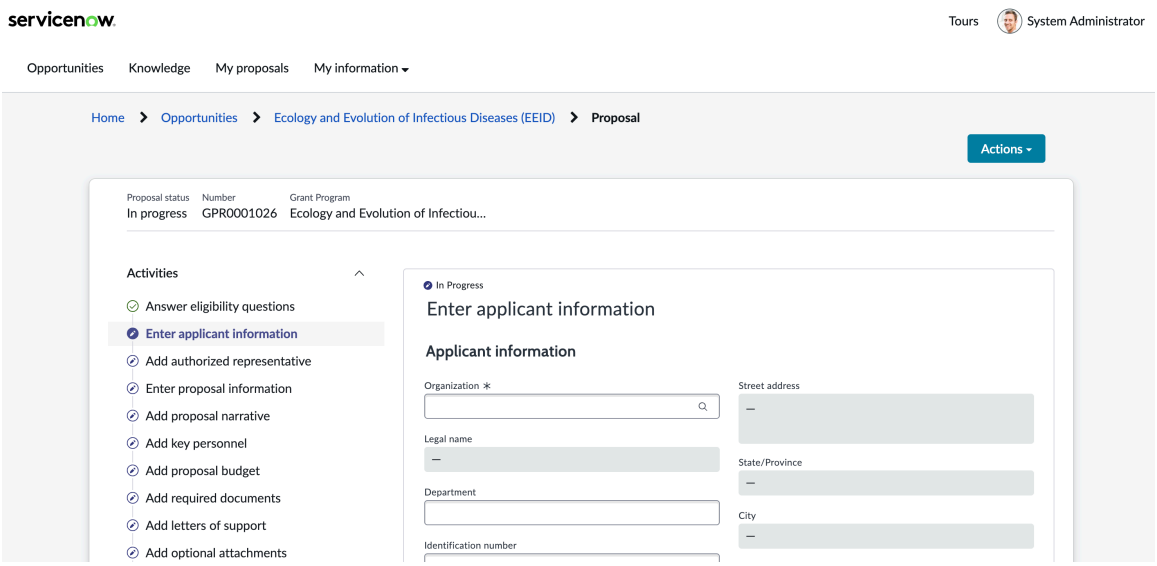
Using the Grants Management Portal in Public Sector Digital Services

As an applicant, you can use the Grants Management Portal to search and view available grant programs. You can apply to grant opportunities and track the progress and status of your application and accept or decline awards.

Whether you're a business contact or a constituent, you can use the Grants Management Portal to:

- Search for and view grant opportunities.
- Apply for grant programs.
- Browse and view featured KB articles that contain relevant resources about the grant process.
- Track the status of your proposal.
- View recently viewed grant programs.
- Acknowledge or decline grant awards.

Workflow steps



Let's see how a constituent would apply for a grant from the Grants Management portal, which uses Playbooks for Portals. The constituent does the following actions:

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1. Selects which grant program catalog item they wish to submit a proposal for.
2. Enters basic information about themselves in a catalog item on one of the portals to open a new case.
3. Adds the details about their application.
4. Uploads the required documents that are needed to process their application.
5. Reviews and edits all the data before submitting the application.
6. Saves all changes and submits the case.

When the customer submits the case, the status of the case changes from **Draft** to **New**.

Apply for a grant using the Grants Management Portal in the Grants Management

As an applicant, complete the Grants Program intake as your first step in submitting a grant proposal. You can access grants programs through Grants Management Portal.

Before you begin

Role required: business contact

About this task

In this stage, an applicant initiates a case for a proposal under a specific Grant Program. Each program is configured by the Grant Program Manager, who defines a set of eligibility rules. Applicants are required to respond to these questions as part of the application process.

Procedure

1. In the Grants Management Portal, navigate to **View Opportunities** > **All**, and select the grants program the applicant wishes to apply for.
2. Select **Apply Now**.
3. Confirm the applicant's eligibility by answering the eligibility questions.

   If the applicant is ineligible, a message stating, "You may not be eligible" is displayed. Applicants have the option to review and update their answers.
4. Select **Start Application** to create a case for the grants proposal.
5. Enter the details of the applicant and the organization that is submitting the proposal, then select **Mark Complete**.
6. **Optional:** Add an authorized representative to act as a signatory for your organization.

   (Optional) Business contact can add an existing contact by in the **Individual** field. Existing business contacts can only be added if they are already associated with the business/ organization. You can create new contacts by adding their details in the form. This will create a new business contact, which can be approved by an admin in a later stage of the application. You can add multiple representatives to the application, or you may leave this section blank.
7. Enter the Proposal information and select **Mark Complete**.

Field	Description
Project Title	Enter title for the proposed project.
Project Abstract	Provide a summary of the project's abstract.
Proposed Funding Start Date	Select the intended start date for funding from the calendar input.

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Field	Description
Proposed Funding End Date	Select the anticipated end date for the funding period. This date must be chronologically later the start date.

8. Add at least one project goal.
   A detailed narrative can be entered in the text, or provided via a file upload.
9. Create a deliverable.
10. Add the required key personnel to the application.
11. Provide information about the budget that will be used for your project, including allocations and relevant documents.
    Input the total budget required under the requested budget total field. The amount entered cannot exceed the limit set by the Grant Program Manager. Allocate budget for each category under Cumulative budget totals. The sum of the category amounts must match the total requested budget total. Once the cumulative category amounts match the requested budget total, the total budget allocated will appear in green.
12. Upload any other required documents.
13. Upload any letters of intent, memoranda of understanding, or other relevant documents that demonstrate partnerships or collaborations for your project.
14. Add any optional attachments to provide further context of the proposed project, such as appendixes, images, and extended data.
    You may leave this section blank.
15. Review the application in its entirety and correct any errors before submitting the application.
    You can edit any information from previous activities by selecting on the pencil icon next to each activity. You can export the application details to a PDF format using the **Export** button.
16. Sign off on the grants proposal.
    The applicant's signature can be either typed or drawn. The terms and conditions can be modified and adjusted as well.
17. Select **Submit** to route it to the agent and move it to the **Screening** stage.
    The case is moved to the **Review** stage, and the **Intake** stage is marked complete.

View the results letter of a grant program proposal

As an applicant in the Grants Management Portal, you can view the results letter (and the merit review summary, where applicable) of your submitted grants applications.

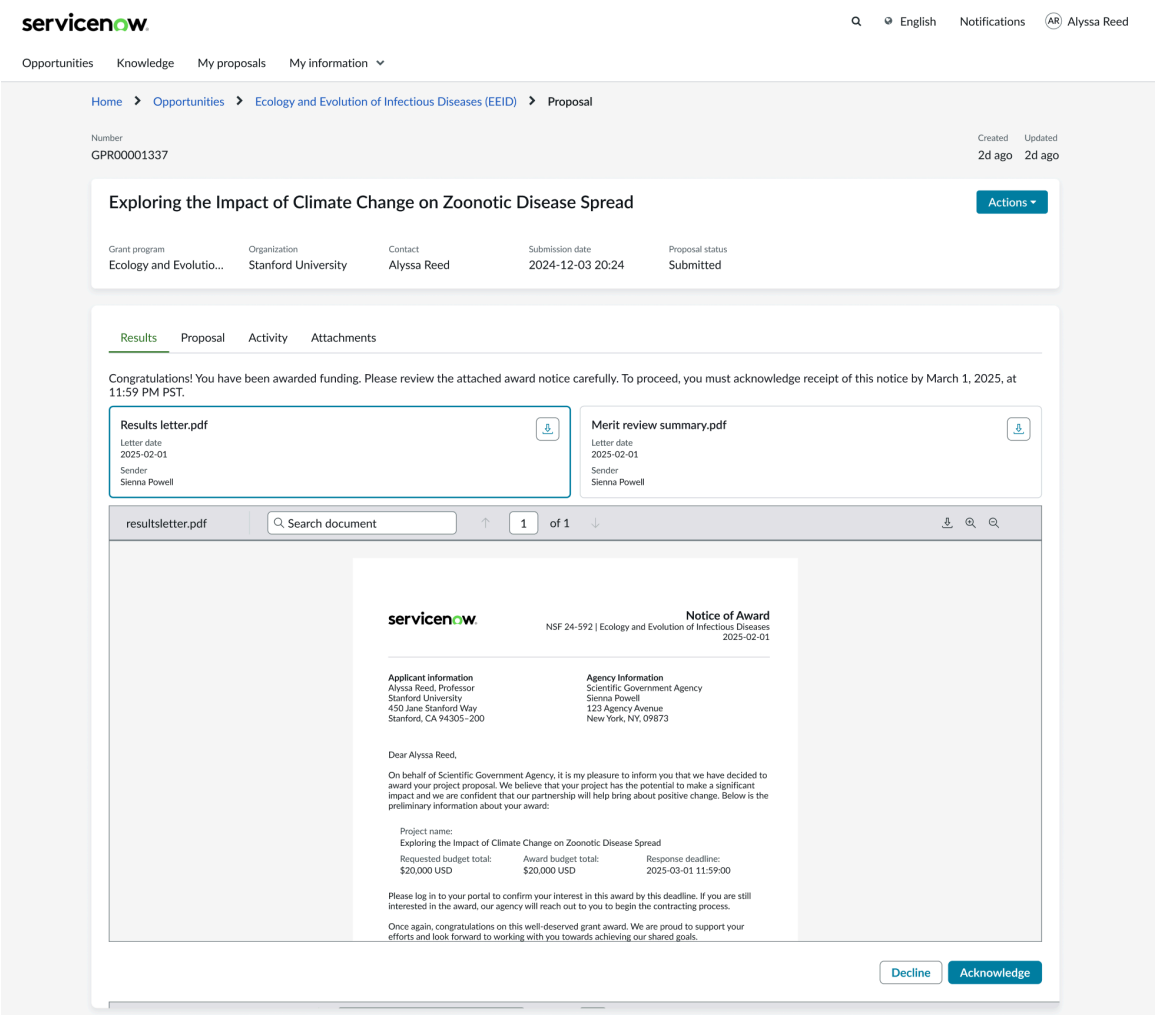
Before you begin

Role required: business contact

Procedure

1. In the Grants Management Portal, navigate to **My Proposals** > **Submitted**.
2. Select the Grant Program you wish to accept or decline the award for.
3. Navigate to the **Results** tab, where you can review the results of the grant proposal set forth by the agency.
4. Select the PDF file to view the results letter, and the merit review summary, where applicable.

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Here, you have the option to either decline or acknowledge the award by the date provided.

Accept or decline a grant award

As an applicant in the Grants Management Portal, you can review the terms of your grant award and choose to accept or decline the award.

Before you begin

Role required: business contact

Procedure

1. In the Grants Management Portal, navigate to **My Proposals** > **Submitted**.
2. Select the Grant Program you wish to accept or decline the award for.
3. Navigate to the **Results** tab, where you can review the results of the grant proposal set forth by the agency.
4. Select **Acknowledge** to accept the grant award, or **Decline** to decline it.

Using the Reviewer Service Portal

The Reviewer Service portal is accessible by merit reviewers to review their assigned merit review tasks. Reviewers can review the grant proposal information available in various tabs in the portal and score the proposal. The scores are based on the review framework and rubric selected by the grants program manager during program setup.

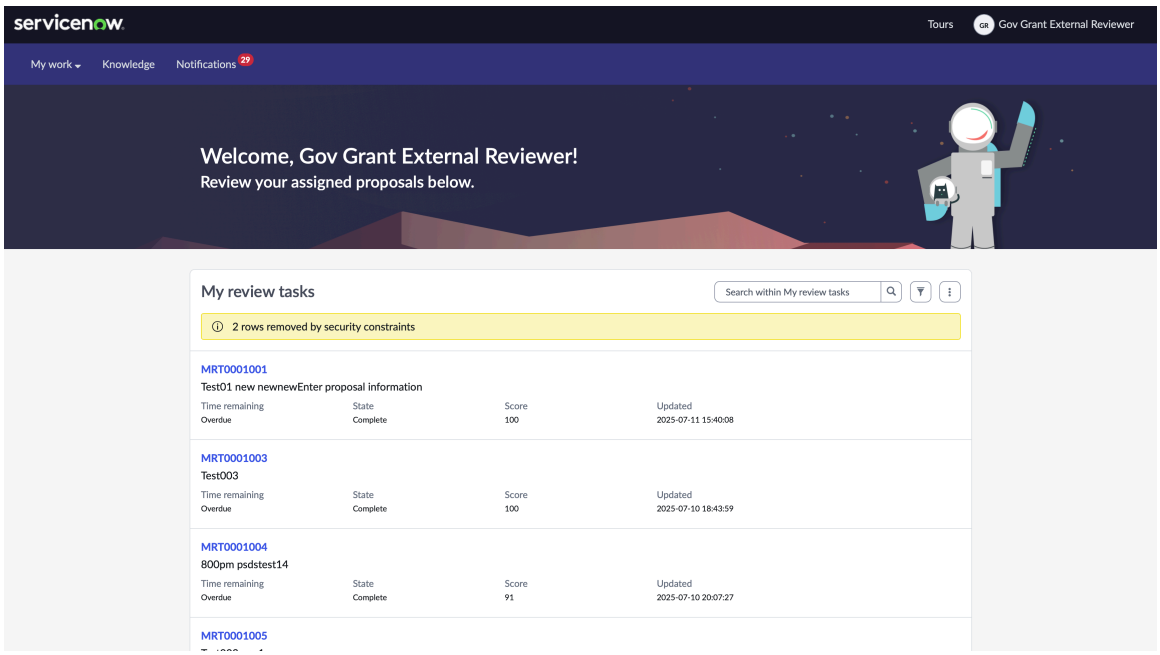
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The reviewer service portal is available to external agents or reviewers for viewing their merit review tasks and scoring the grant proposals. Scores generated are based on the review framework and scoring rubric selected by the grants program manager during program setup. From the reviewer service portal, the merit reviewers can either submit scores or decline to review by providing appropriate reasons. The grants program manager is notified of the merit reviewer decisions in the Grants Management portal.

External Reviewer Landing Page

The Grants Management experience begins on the Reviewer service portal landing page for external. Grants organizations may customize their landing pages with branding colors or other display changes, but the components may remain the same.

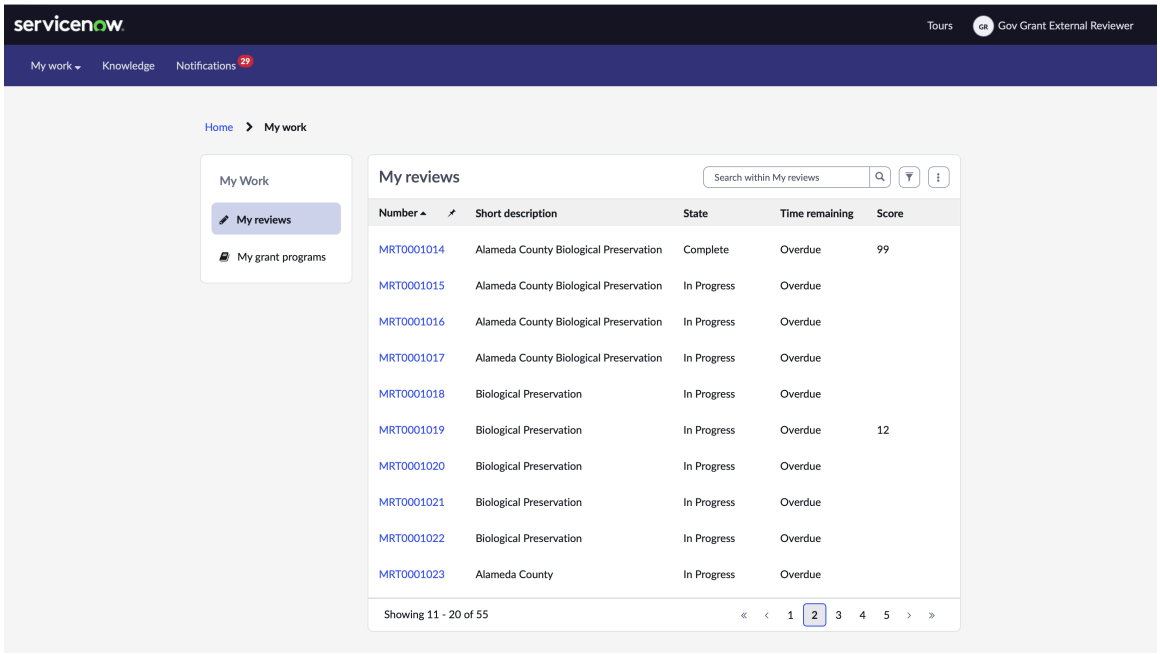
The following is an example of how the default landing page appears on the Reviewer service portal workspace for an external reviewer.



Here, you can view all assigned review tasks under the **My Review Tasks** section. Merit reviewers can do the following tasks in the Reviewer Service Portal:

- View and manage a list of review tasks for grant proposals.
- View grant programs or proposals that they are participating in.
- View the grant program announcement page.

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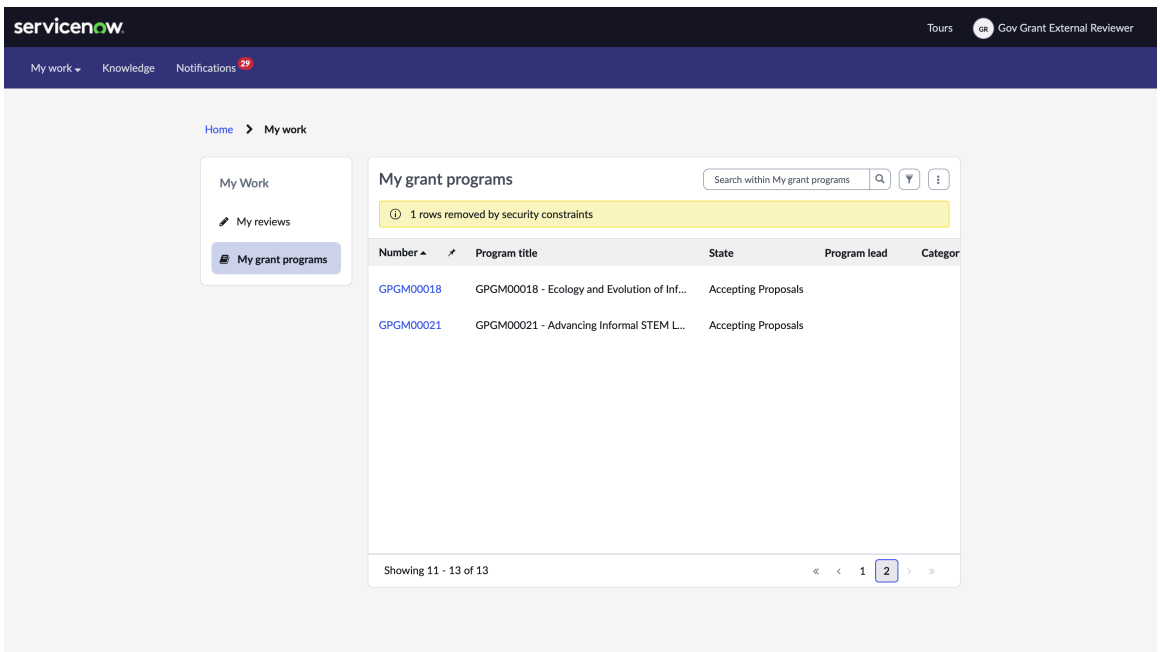


My grants program page

For external reviewers, the my grants program record page aims to be a one-stop shop. Within the My reviews page, you can view all your assigned Merit Review Tasks (MRTs) for which you serve as a reviewer.

From the **My Work** tab, select **My reviews**. You can view the list of Merit Review Tasks assigned to Gov Grant External Reviewer, as well as:

- View high-level information from the record page of the grant program by selecting the grant program number.
- View details of the listed review tasks such as time remaining, status, score, and flags.



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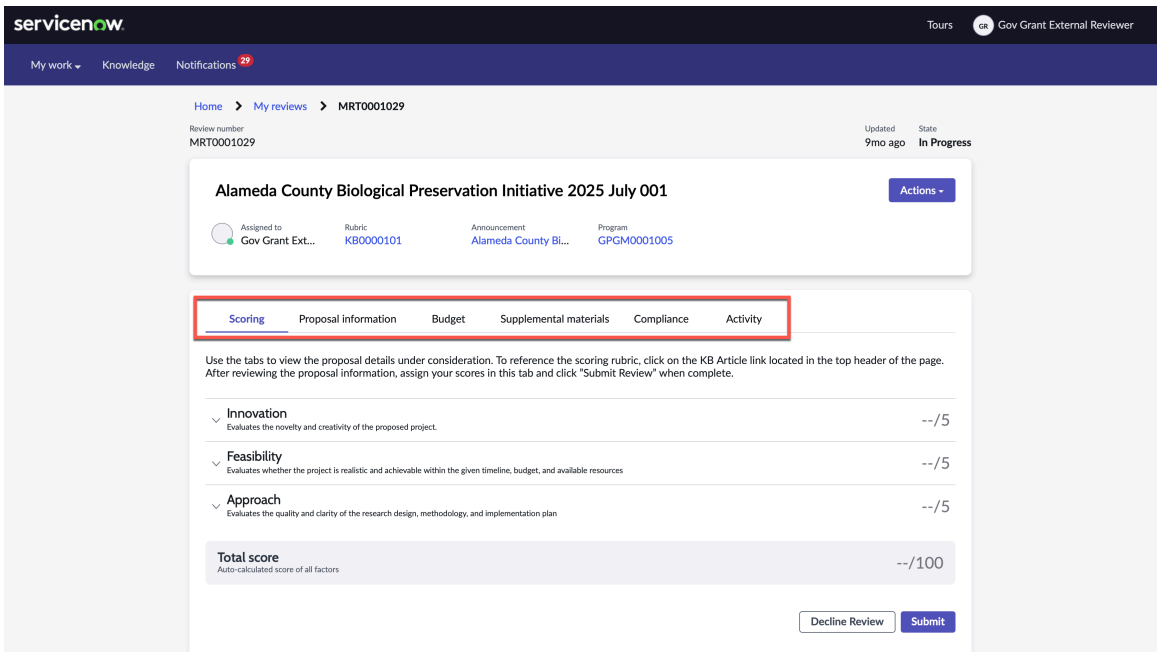
Merit Review Task Page

Users can select any Merit Review Tasks (MRTs) from the list and score each MRT that is currently in the “In Progress” state based on several attributes and assign a score out of 5. If necessary, users can also decline specific MRTs by providing a valid reason, such as a conflict of interest or other concerns. Additionally, users can view all the details associated with each task.

- View or reference the scoring rubric by selecting the KB article.
- Review proposals and assign scores based on their assessment or flag any reviews.
- Provide comments for rationale, strengths, or concerns about their evaluation of the proposal.
- Submit or decline a review along with justifications.

Merit Review Task Tabs

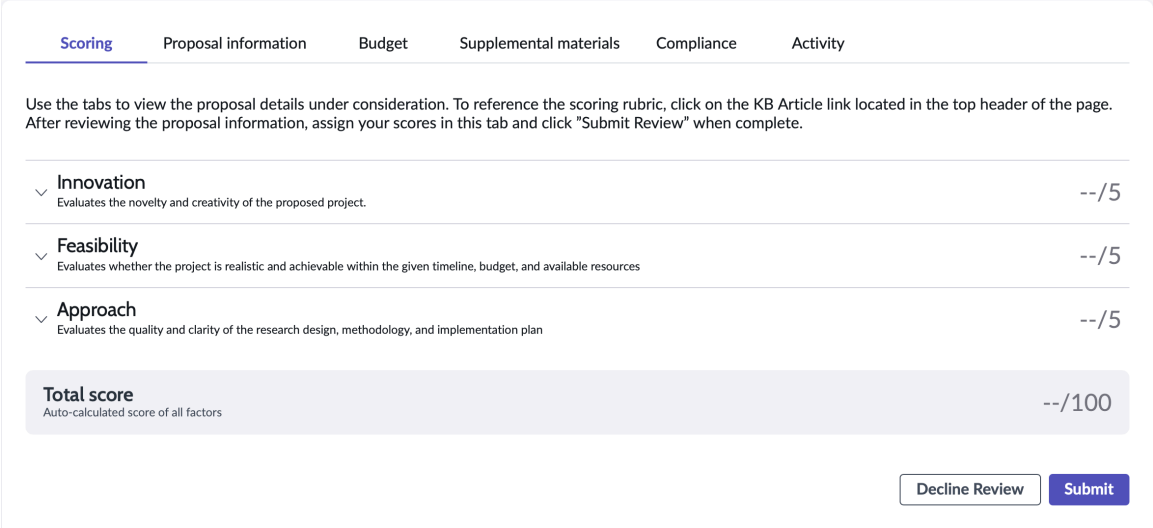
You can review the proposal by navigating through the following tabs: Proposal Information, Budget, Supplemental Materials, Compliance, and Activity.



Scoring

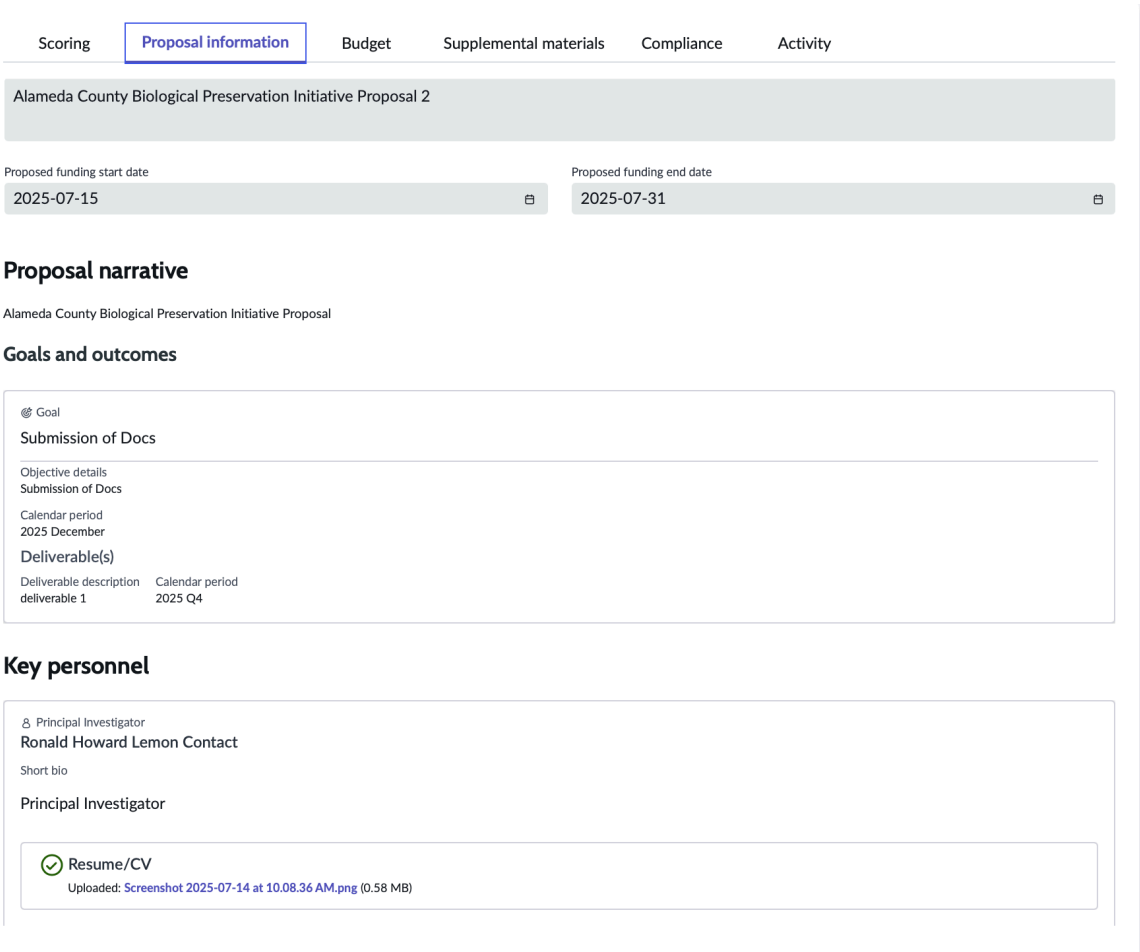
By default, no scores are displayed in this tab. For each evaluation category—Innovation, Feasibility, and Approach—you can assign a score out of 5. Additionally, you can provide input for the Rationale Summary, as well as identify Strengths and Concerns. Once your input is complete, you have the option to Save or Reset your changes.

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Proposal Information

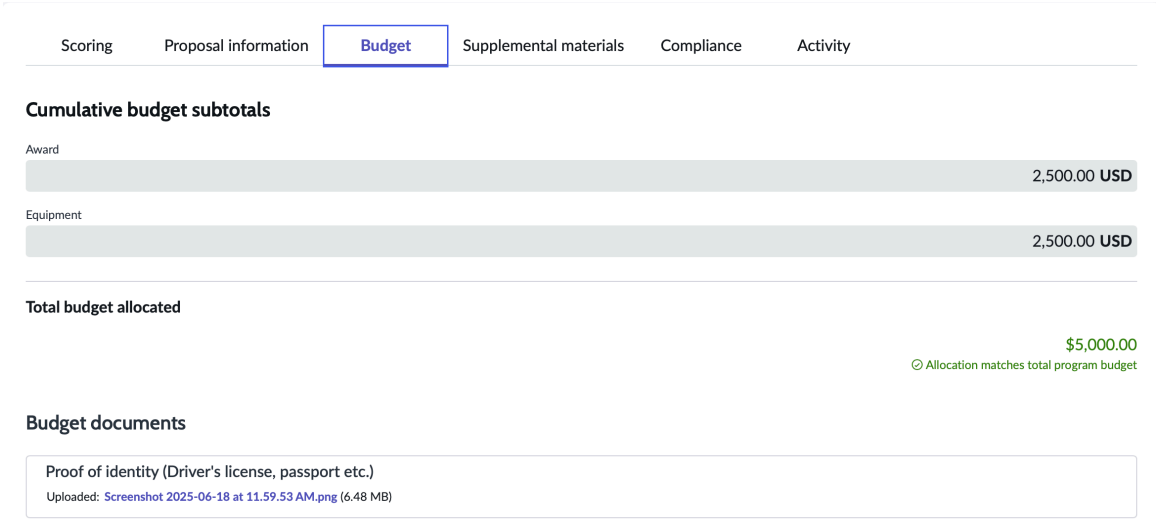
This section provides detailed insights into the proposal, including the Proposal Overview, Narrative, Key Personnel, and Required Documents.



Budget

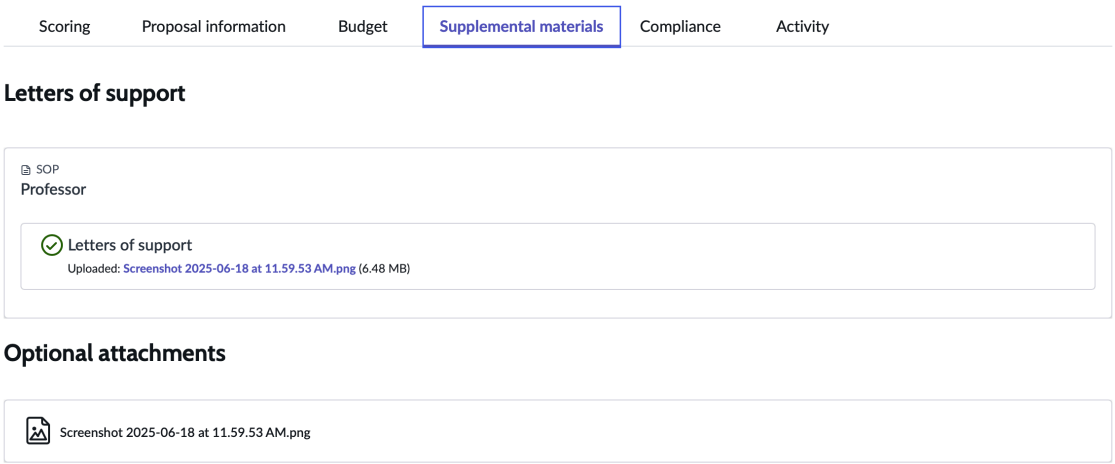
This tab provides a detailed breakdown of the financial aspects of the proposal, including cumulative budget subtotals and access to all relevant budget documents.

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Supplemental Materials

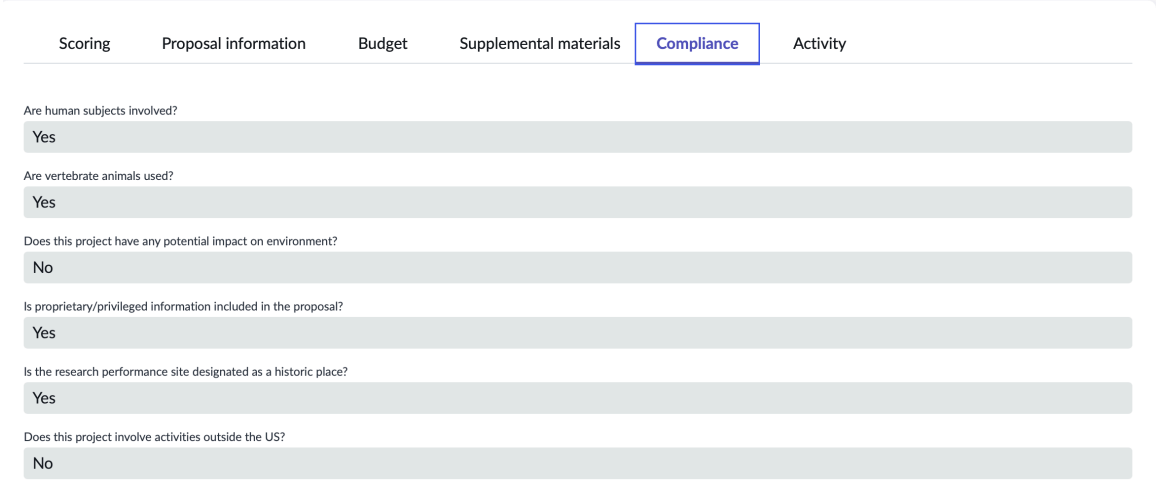
This section includes additional supporting documents, such as Letters of Support and optional attachments.



Compliance

This tab contains the compliance questionnaire along with the corresponding responses.

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Activity

This tab allows you to track all actions, updates, and changes made throughout the merit review process.

Review and score a grant proposal using the Reviewer Service Portal

As a Merit Reviewer, you can review grant proposals for feasibility, impact, and alignment with the grant program's goals. Reviewers can then score proposals as part of the evaluation stage of the Public Sector Digital Services Grants Management using the Reviewer Service portal.

Before you begin

Role required: external_reviewer

About this task

Reviewers can then score proposals as part of the evaluation stage of the Public Sector Digital Services Grants Management using the Reviewer Service portal.

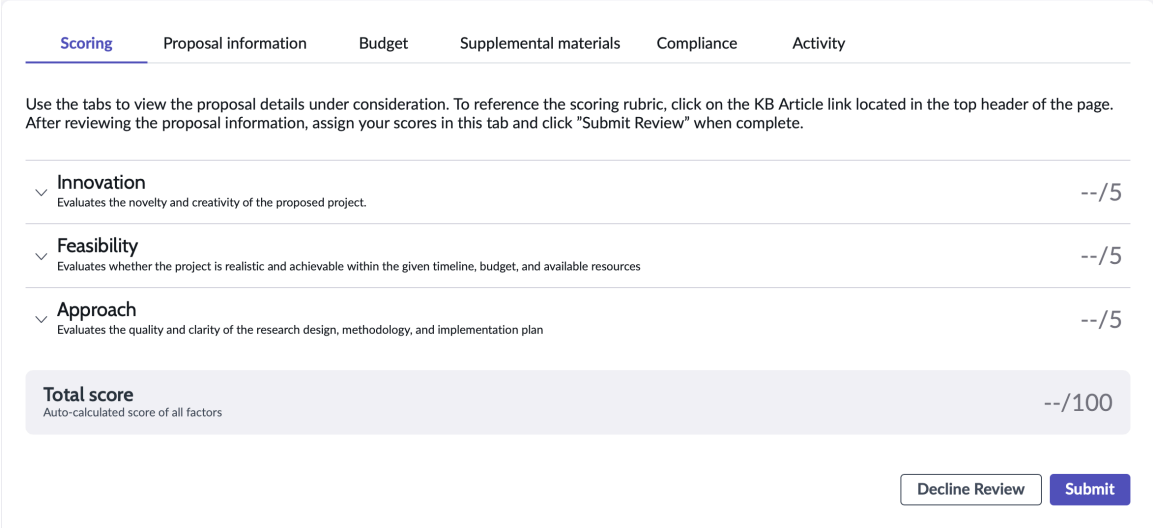
You can either select Submit or Decline Review for a particular Merit Review Task. When you click Submit, a modal will appear where you can confirm by clicking Submit again, and the state will automatically change from “In Progress” to “Complete”.

When you select Decline Review, a modal pops up where you can decline specific MRTs by providing a valid reason, such as a conflict of interest or other concerns. The state then changes to Declined, and the view returns to the default scoring screen with no scores.

Procedure

1. Log in to the Reviewer Service Portal.
   All review tasks appear under **My review tasks** along with the state of the task, score, and the last updated date.
   - To view your review tasks, navigate to **My work** > **My reviews**.
   - To view review tasks for a specific grant program that you are participating in, navigate to **My work** > **My grant programs**.
2. Select a review expand the categories under the **Scoring** tab.
   Scoring is the default tab that appears. Select other tabs to view information about the grant proposal.

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3. Select a score from the drop-down and provide comments for rationale, strengths, and concerns for each of the categories and select **Save**.
   For more information about the scoring rubric, select the KB article listed under **Rubric**.
4. Select **Submit** to complete the review or select **Decline review** and provide a reason.
   The evaluation is successfully complete and the status of the review task is updated to **Complete**, along with the score, triggering a notification to the grants program manager.

Result

The proposal is now routed to the grants program manager for further evaluation, and they are able to approve or decline the proposal.

Using the Business Location Service Portal in Public Sector Digital Services

You can use the Business (Agency) Location Service Portal (BLSP), available with the Public Sector Digital Services application, as a one-stop shop to manage internal and external agency locations.

As a user with the sn_customerservice.svc_location_manager, sn_customerservice.svc_location_manager_contributor, or admin role, you can use the Business (Agency) Location Service Portal page to:

- Get a 360° view of an agency location.
- Add and manage agency members.
- Submit cases against agency locations, or public services at a service organization.
- Access Knowledge Base articles and engage with the community.

From the Business Location Service Portal, you can access and use the following features:

Business Location Service Portal

UI component	Description
Support	Click **Support** to create a customer case.
Knowledge	Clicking **Knowledge** on the header takes you to the kb_home page. You can search the

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Business Location Service Portal (continued)

UI component	Description
	Knowledge Base or view a list of top-rated or most viewed Knowledge Base articles.
Cases	View the list of cases.
Your Information	Navigate to agency locations, services received, and install base items.
Profile menu	Click your profile photo to either view your profile or log out.
Search	Enables you to search support articles and requests. Enter a search term and click **Search** to view the search results.
Browse Services	Click **Browse Services** to report an issue or request a service. Use the service to register a member at an external agency location.
View Articles	Explore the knowledge base to get the information.
Ask the community	Provides access to the Community homepage. You can use the community to ask questions and get answers, connect with people who share similar expertise, and join forums and participate in discussions.
Agency Locations	Get the 360° view of the agency location. Use the feature to: • Add a member to an agency location. • Report cases on behalf of an agency location. • Report cases against services received from a specific agency location. • Report cases against public services offered at a particular agency location.
Featured Articles	View featured community content.
Most Viewed articles	View a list of the most viewed articles.

Depending on the configuration set by your administrator, you can perform the following tasks from the Agency Location Service Portal:

- Register and assign staff members to an agency location
- Report cases on behalf of an agency location
- Report cases against services received from a specific agency location
- Report cases against public services offered at a particular agency location
- Access knowledge base articles and frequently asked questions

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Using the CRM Workspace for Public Sector Digital Services

Set up CSM Configurable Workspace for your agents and expand the Workspace UI so they can engage with customers, answer questions, create cases, and resolve issues.

Government service agents can complete most tasks in CRM Workspace. For more information on how to set up the CRM Workspace, see Set up the CRM Workspace for Public Sector Digital Services.

The tables below describe some of the basic tasks that agents can perform in CRM Workspace.

Agent tasks

Task	Description	Details
Use playbooks	Use the step-by-step guidance provided by playbooks to complete tasks and resolve cases.	Using Playbooks
Create a specific type of case	Create a case for a specific type of constituent request.	Creating and resolving case tasks
Use Knowledge to assist with cases	Search for knowledge articles and attach them to cases or open articles in sub-tabs for easier reading. Report a knowledge gap if you can't find relevant articles and, if permission is enabled, create articles directly from cases.	Search for knowledge articles Open a knowledge article Report a knowledge gap Create a knowledge article
Use response templates	Quickly respond to customers using different types of predefined information.	Use response templates in Service Request Playbook

Creating and resolving case tasks as a government service agent in CRM Workspace

Service request case tasks in Public Sector Digital Services are automatically created and assigned to agents as each service request case moves through its life cycle. Government service agents can view and complete these case tasks (or even create their own tasks) in the CRM Workspace.

View existing service request case tasks in CRM Workspace

View a list of the case tasks that are associated with a service request case, regardless of whether the case task was created automatically or manually, in the CRM Workspace.

Before you begin

Role required: sn_gsm.agency_manager, sn_gsm.government_service_manager, sn_gsm.constituent_agent, sn_gsm.business_agent, sn_gsm.agency_constituent_agent, or sn_gsm.agency_agent

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Procedure

1. From the Lists menu in the CRM Workspace sidebar, navigate to **Service Requests** > **All**.
2. Open the service request case by selecting the case number.
3. In the Related List header, open the Tasks related list by selecting **Case Tasks**.
   All the tasks that are associated with this service request case are displayed.

What to do next

To view a list of every service request case task that has been assigned to an agent in your agency, navigate to **Lists** > **Government Service Case Tasks** > **All**.

Create a service request case task in CRM Workspace

Manually create case tasks from information that you gathered from a service request case in CRM Workspace.

Before you begin

Role required: sn_gsm.agency_manager, sn_gsm.government_service_manager, sn_gsm.constituent_agent, sn_gsm.business_agent, sn_gsm.agency_constituent_agent, or sn_gsm.agency_agent

About this task

When an agent creates a service request case task, the system uses information from the service request case to automatically fill in the fields on the Case Task form. Agents can use auto-filled information, as well as the data collected from the end user, to create service request case tasks. After the agent creates and saves a case task, it appears in the Case Tasks related list on the Service Request Case form.

Procedure

1. Open the case.
2. From the Case Tasks related list, select **New**.
3. On the form, fill in the fields.
   For more information on the fields, see Service Request Case Task form.
4. Select **Save**.

Resolve a service request case task in CRM Workspace

Resolve a service request case in CRM Workspace. After all information has been added to the comments or work notes of a service request case task, you can mark the case task as resolved.

Before you begin

Role required: sn_gsm.agency_manager, sn_gsm.government_service_manager, sn_gsm.constituent_agent, sn_gsm.business_agent, sn_gsm.agency_constituent_agent, or sn_gsm.agency_agent

Procedure

1. Navigate to the Lists menu in the CRM Workspace sidebar.
2. From the Lists menu in CRM Workspace, navigate to **Service Requests** > **All**.
3. Open the service request case by selecting the case number.
4. From the Tasks related list, select the task number.
5. Add any additional work notes or comments.
   The case task can't be resolved without added work notes or comments.

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6. Select **Save**.
7. Select **Close**.

Create a business record in CRM Workspace

If you're a government service agent, create a business record in CRM Workspace directly from a service request, interaction, or case when an incident is reported by a constituent, business, or business contact.

Before you begin

Role required: sn_gsm.constituent_agent, sn_gsm.business_agent, sn_gsm.agency_agent, sn_gsm.relationship_agent, or sn_gsm.service_manager

Procedure

1. Navigate to the CRM Workspace and select **Interactions** > **All**.
2. Select the interaction number to open an existing interaction record, or select the new icon New to create an interaction.
3. Select the interaction type and assign the interaction to a user.
4. **Optional:** Enter a short description of the interaction.
5. Select **Save**.
6. Select **Create Business** and fill in the fields.
   For more information on the fields, see Business Profile form.
7. Select **Submit**.
   The business is now linked to the interaction, and a new tab opens with the business details.

Using Virtual Agent for Public Sector Digital Services

As an admin, you can use Virtual Agent to create chatbot conversations tailored to public sector use cases.

With Virtual Agent for Public Sector Digital Services, which is available by subscription, you can build conversation topics that assist your constituents with self-service tasks. For example, you can create Virtual Agent topics that enable constituents to submit government service cases or help them find relevant information on government regulations or benefits.

As admins or topic authors, you can build your own custom, public sector conversation topics. Or, you can use pre-built conversations that are available with the Virtual Agent platform and Customer Service Virtual Agent Conversations plugin (com.sn_csm.virtualagent) and modify them for public sector use cases.

When you're creating or modifying topics, you can also use pre-built components called topic blocks. These blocks are subflows that run conversational elements or common tasks in a conversation, such as adding or retrieving records. Pre-built topic blocks are included with the Virtual Agent platform and Customer Service conversations. Topic blocks enable topic authors to quickly add standard functions to Virtual Agent conversations, simplifying conversation design and maintenance.

The Public Sector Digital Services Core application provides several topic blocks that you can use in public sector conversations:

- Prompt Service for Constituent – Asks constituents to select a type of government service.
- Create Public Sector Additional Members – Prompts constituents to add other persons who have an authorized interest in an issue or case.

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To learn more about topic blocks and how to use them in Virtual Agent conversations, see Maximizing code reuse with topic blocks.

Before building Virtual Agent topics for public sector use cases

Before creating Virtual Agent conversations, review the following prerequisites and the basic process for working with pre-built topics and topic blocks in Virtual Agent Designer.

- Activate the Customer Service Virtual Agent Conversations plugin (com.sn_csm.virtualagent) to access pre-built Customer Service conversations and topic blocks.
- Determine the public sector use cases for topics to be created.
- In Virtual Agent Designer:
  - Preview (test) pre-built topics and topic blocks, such as the public sector blocks, to see how they work. Use the **Type** filter to sort the list of items, such as topic blocks, in the Topics page.
  - If you want to use a pre-built topic or topic block, duplicate and publish it.
  - Add the appropriate copies of topic blocks, such as the public sector topic blocks, to the originating (calling) topic. To learn more about adding topic blocks to a conversation, see Add a reusable topic block to a calling topic or topic block

Note: You can use both public sector topic blocks in a conversation.

Prompt Service for Constituent topic block

Use this topic block in a conversation to ask constituents to select a service from a list of available government services, for example permits or licenses. Activate the Customer Service Virtual Agent Conversations (com.sn_csm.virtualagent) plugin to use this topic block.

Create Public Sector Additional Members topic block

Use this topic block to let your constituents specify other people, such as family members or other authorized individuals, who can view a case or issue. Activate the Customer Service Virtual Agent Conversations (com.sn_csm.virtualagent) plugin to use this topic block.

When you use this topic block in a conversation, you specify the input parameters from the originating (calling) topic to the topic block.

Public Sector Additional Members input parameters

Parameter	Description
case_id	sys_id of the public sector case record created.
case_type	Extension of the base public sector service.

Mobile Agent experience for Public Sector Digital Services

If you're a government agent, you can use the Mobile Agent app on your mobile device to create, update, and monitor the status of non-emergency service requests in the Public Sector Digital Services application. You can also get an overview of your case load, including your new and active cases.

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Use the Mobile Agent to review your case details and complete your case tasks. With a government service agent role, you can use the app to do the following tasks:

- Get a quick overview of your case load.
- Add comments or work notes to cases.
- Review your case details, activity stream, and related information, such as the service level agreements (SLAs), case tasks, and related cases.
- Edit case information.
- Complete case tasks.

The following video highlights some of the capabilities of the ServiceNow® Mobile Agent app.

Note: To use the Mobile Agent, the required plugins must be enabled by an administrator. If you're an administrator, see Configure Mobile Agent for Service Request Playbook to get the information on configuring the Mobile Agent. For instructions on how to get started with the app after an administrator configures these settings, see Get started with the Customer Service mobile application.

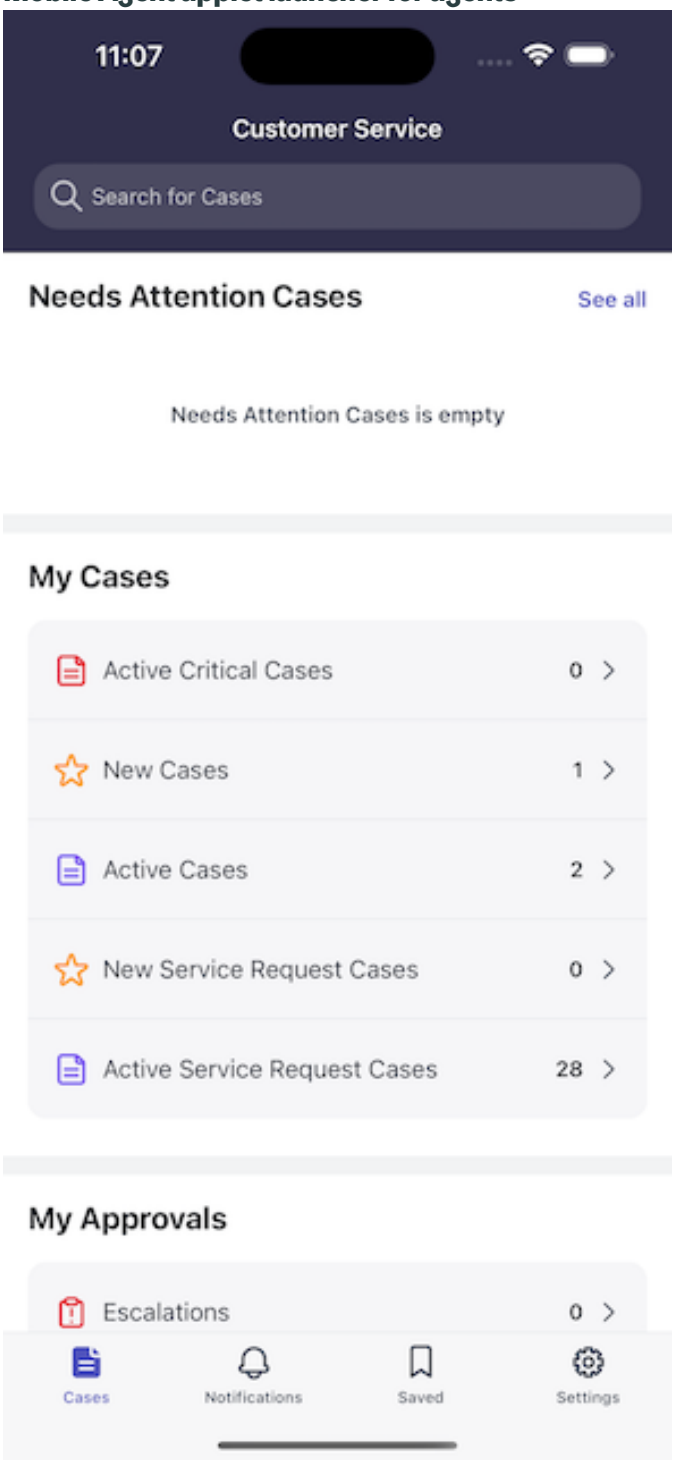
Mobile Agent homepage

When you open the Mobile Agent and log in, an applet launcher is displayed with all the applets that are configured to that launcher.

The following example shows the homepage of the Mobile Agent, which displays an overview of cases.

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Mobile Agent applet launcher for agents



The applet launcher includes all the applets that you need to address or resolve service request cases. You have access to the following applets:

New Service Request Cases	All service request cases that are assigned to you in the **New** state.
Active Service Request Cases	All service request cases that you have access to but haven't been resolved or canceled, including the cases in the **Open**, **Awaiting Info**, and **Resolved** states.

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New Information Request Cases	All service request cases that are assigned to you in the **New** state.
Active Information Request Cases	All information request cases that you have access to but haven't been resolved or canceled, including the cases in the **Open**, **Awaiting Info**, and **Resolved** states.

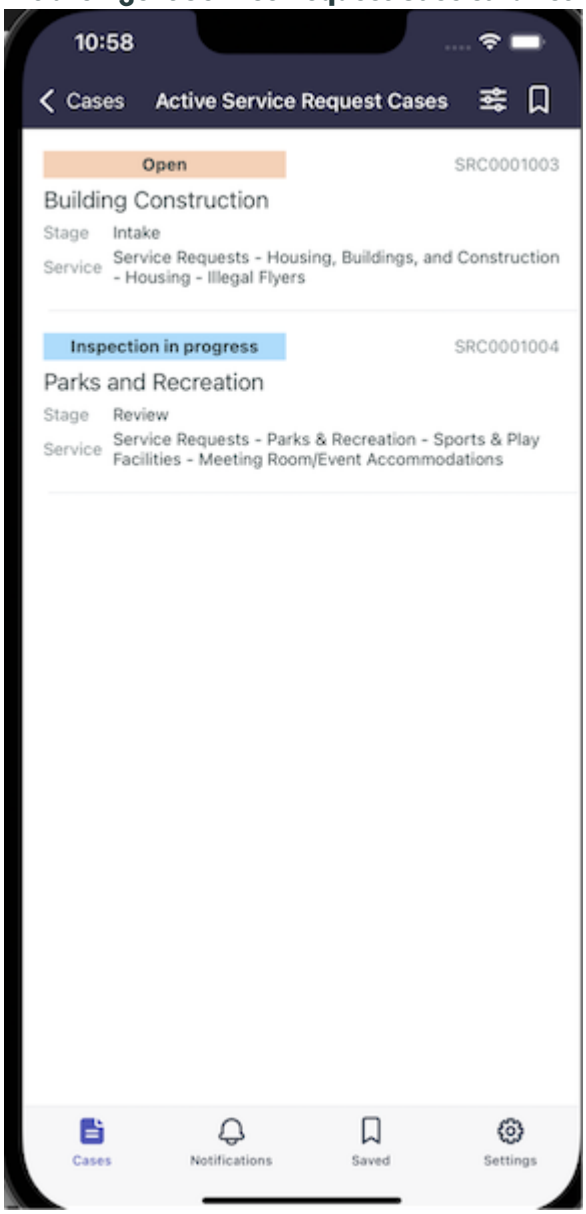
To launch an applet, select it in the app.

Applets and cards

Each applet on the applet launcher screen displays the records that correspond to the applet function. The Active Service Requests applet, for example, when tapped, displays a list of all the active service request case records.

The following example shows a service request card view with a list of all active service request case records.

Mobile Agent Service Request Case card list



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The cases in the list are displayed as cards, and the state of the case is displayed at the top of the card. For more information on the case states, see Life cycle of a Public Service case.

Select a card to see the case record details. For example, you can see the case activity, related lists, and case escalations, if any.

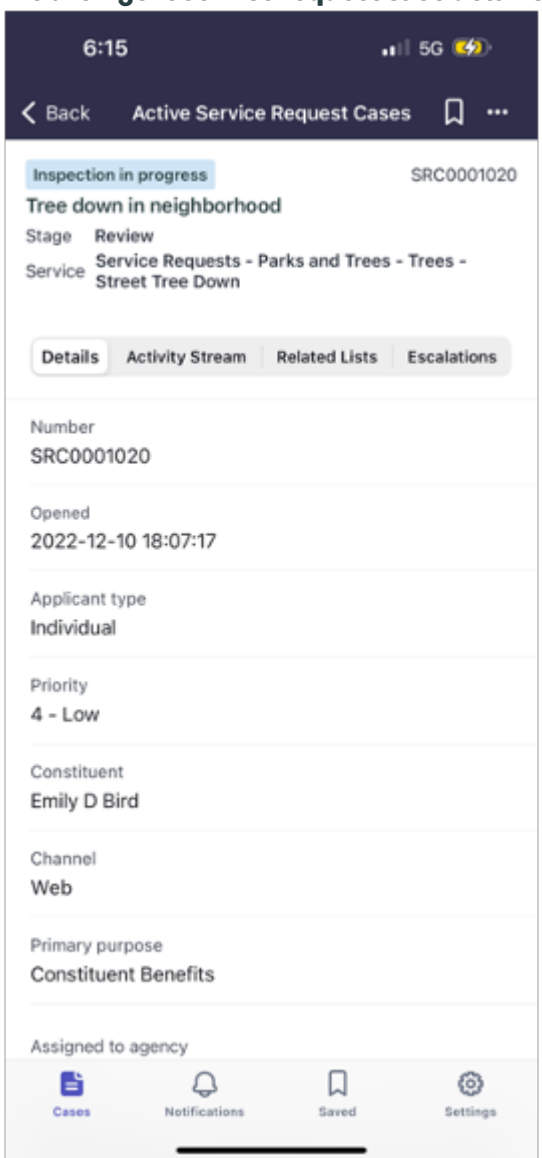
You can narrow down or sort the list of cases by using the filter icon ( ).

Service Request case cards in the Mobile Agent app

The case cards in the Mobile Agent app display information that is similar to what you would see if you were viewing a case in the CRM Workspace. For a full list of service request case fields and their descriptions, see Service Request case form.

The following example shows the case details card view. In this view, you can see the case number, case opened date, application type, priority, constituent, channel, primary purpose, and which agency is assigned to the case.

Mobile Agent service request case detail card

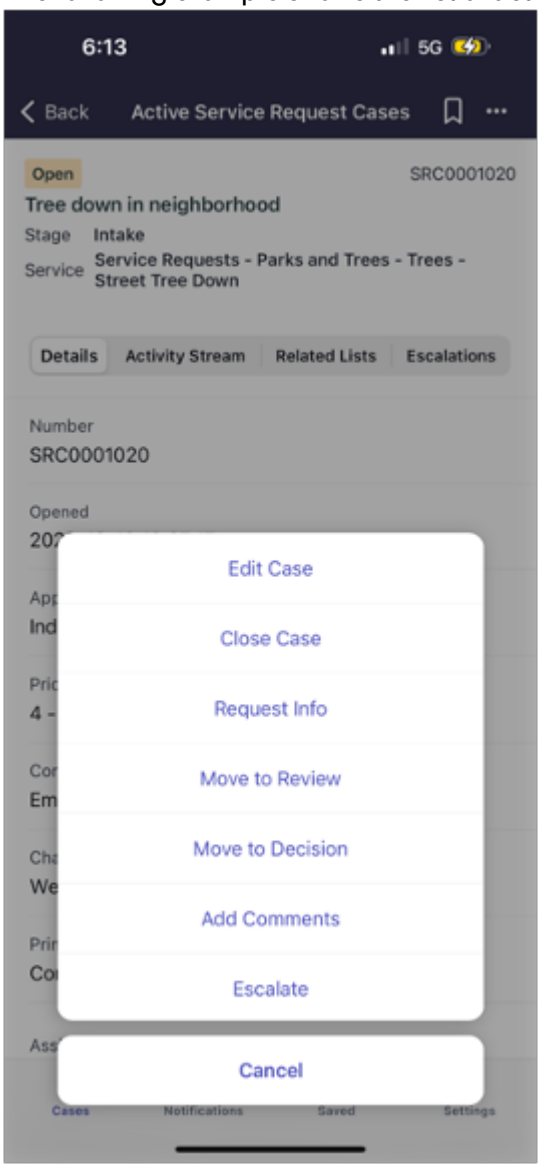


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As an agent, you can take several actions on service request cases in the Mobile Agent app from within the case cards. In the case detail view, you can select the More Actions icon ( ) to see a list of actions, and select the back button to return to the record list. These actions include:

- Editing the case.
- Closing the case.
- Requesting more information from the constituent or contact.
- Moving the case to review.
- Moving the case directly to a decision.
- Adding comments.
- Escalating the case.

The following example shows the list of actions that you can take for a service request case.



For more information on the agent tasks in the Mobile Agent app, see Using the Mobile Agent to perform agent tasks.

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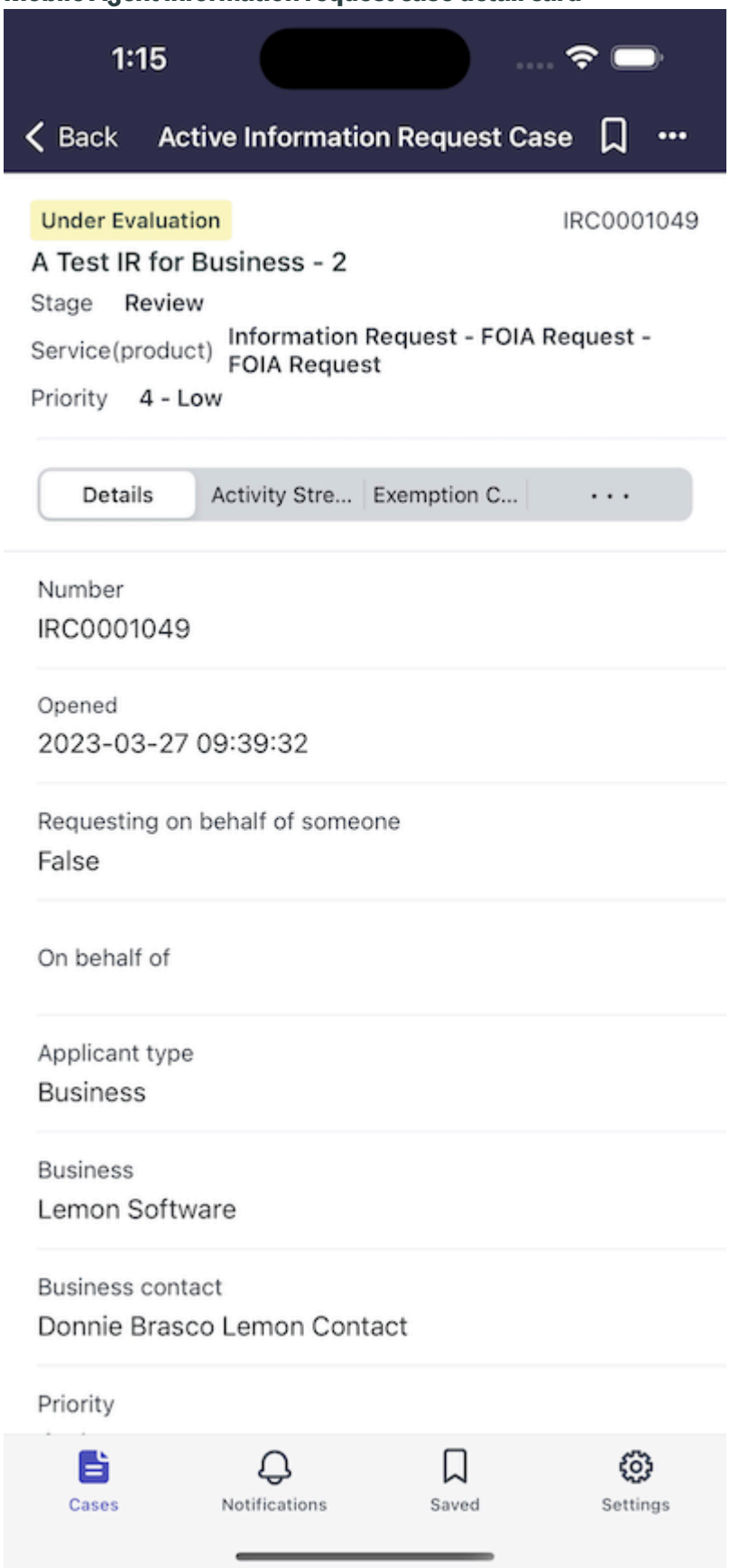
Information Request case cards in the Mobile Agent

The case cards in the Mobile Agent display information that is similar to what you would see if you were viewing a case in the CRM Workspace. For a full list of information request case fields and their descriptions, see Information Request case form.

The following example shows the case details card view. In this view, you can see the case number, case opened date, application type, priority, contact, channel, primary purpose, and which agency is assigned to the case.

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Mobile Agent information request case detail card

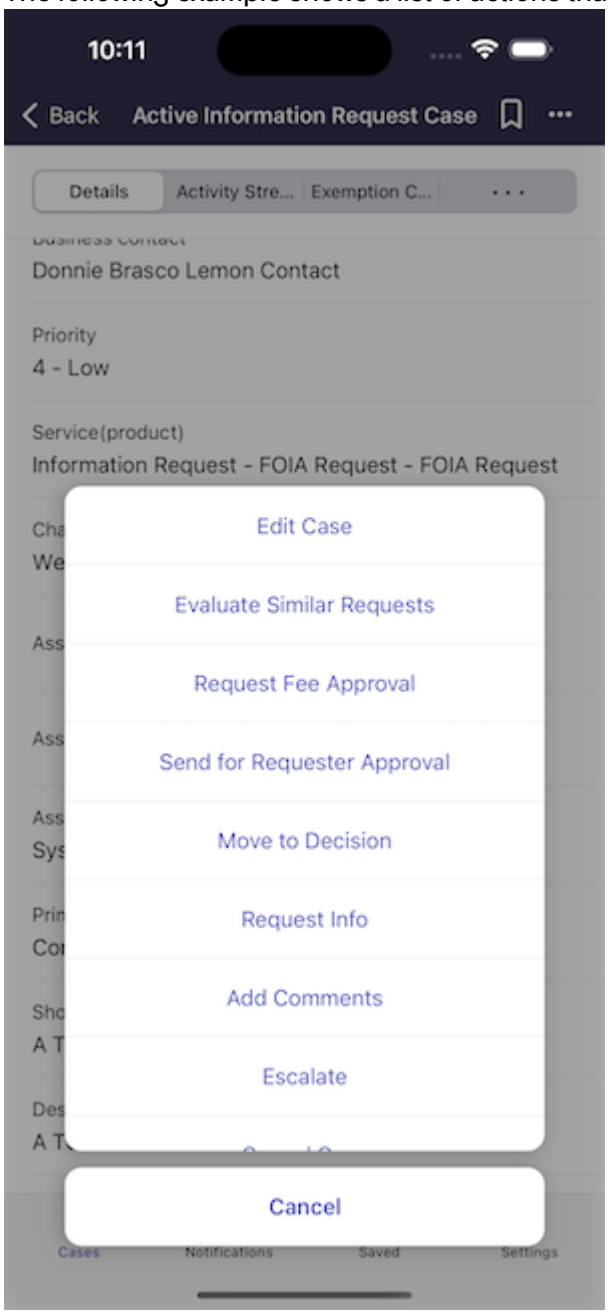


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As an agent, you can take several actions on information request cases in the Mobile Agent from within the case cards. In the case detail view, you can select the More Actions icon (...) to see a list of actions, and select the back button to return to the record list. These actions include:

- Editing the case.
- Closing the case.
- Requesting more information from the requester.
- Requesting fee approvals.
- Evaluating similar information requests.
- Moving the case directly to a decision.
- Adding comments.
- Escalating the case.

The following example shows a list of actions that you can take for an information request case.



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For more information on the agent tasks in the Mobile Agent, see Using the Mobile Agent to perform agent tasks.

Navigation bar

The navigation bar appears at the bottom of the mobile application screen. This bar includes the following tabs:

Cases

Displays the main case page. Use this applet launcher to access the case management functionality.

Saved

Displays the saved cases or case lists.

Settings

Manages settings for the mobile application.

Related lists in the Mobile Agent

You can access the related lists that are listed in the following table from within the case details.

Related lists in the Mobile Agent app

Related list	Description
Work Orders	List of work orders that were created for this case. You must install the Field Service Management plugin (com.snc.work_management) to view the work orders.
Case Tasks	Displays a list of case tasks. You can view the following information for the case tasks in this list: • State • Number • Subject • Assigned to • Priority
SLAs	Displays a list of the service level agreements (SLAs) for a case. The following information for SLAs is included in this related list: • Task • SLA Stage • SLA Definition • Actual Elapsed Percentage • Actual Elapsed Time

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Related lists in the Mobile Agent app (continued)

Related list	Description
Blocked Tasks	List of blocking tasks that have been created for this case. A blocking task is something that prevents you from making progress toward a case resolution.
Related Parties	List of related parties, such as the contacts or constituents that were added to the case.
Related Cases	Displays a list of the related cases for a case. You can view the following information for the related cases that are included in this list: • Case number • State • Short description • Contact Select a related or child case to view the additional details on the Case form.
Attached Knowledge	Knowledge articles that were attached as a proposed solution to the case.
Documents	List of attached documents for the case.

Using the Mobile Agent to perform agent tasks

If you're a government service agent, you can manage your cases and receive real-time updates on your mobile device with the Mobile Agent.

With the Mobile Agent, you can perform routine actions and approvals from your mobile device anytime and anywhere. The following table describes the tasks that you can perform with the Mobile Agent

whether you're triaging a service request case, or fulfilling an information request.

Government service agent tasks

Agent task	Steps
View a case	View the details of a case and determine if you need to make any changes or take any actions. **1.** In the bottom navigation bar, select **Cases**. **2.** Select **New** to create a case or select **Active** to see a list of the active service request cases. **3.** Select a case to view its details. **4.** Determine if you need to make any changes or take other actions. If so, perform any of the tasks in this table.

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Government service agent tasks (continued)

Agent task	Steps
	For details on viewing a case in the Mobile Agent, see Track government service requests with the Mobile Agent app.
Edit a case	1. From the Service Requests list, open a case. 2. Tap the More actions icon () and select **Edit Case**. For details on the case fields, see Service Request case form.
Add comments to a case	1. From the Service Requests list, open a case. 2. Tap the More actions icon () and select **Add Comments**. 3. In the**Work Notes** or **Additional Comments** fields, add your work notes or comments about the case. You can also add comments through the activity stream related list. For more information, see Using the activity stream in the Mobile Agent.
Propose a solution for a case	1. Tap the More actions icon () and select **Propose Solution**. 2. In the **Resolution Code** and **Resolution Notes** fields, add the code and notes that you propose as a solution to resolve the case and then select **Submit**.
Request more information	1. Tap the More actions icon () and select **Request Info**. 2. In the **Additional Comments** field, add more comments about the request.
Escalate a case	1. Tap the More actions icon () and select **Escalate**. 2. In the **Escalations** dialog box, fill in the details of the escalation.

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Government service agent tasks (continued)

Agent task	Steps
View escalations	1. From the applet launcher, select the **Escalations** applet. 2. View a list of escalations for that case, if any.
Close a case	1. Tap the More actions icon () and select **Close Case**. 2. In the **Resolution Code** and **Resolution Notes** fields, enter the code and your notes about how the case was resolved.

Information request agent tasks

Agent task	Steps
View a case	View the details of a case and determine if you need to make any changes or take any actions. 1. In the bottom navigation bar, select **Cases**. 2. Select **New** to create a case or select **Active** to see a list of the active service request cases. 3. Select a case to view its details. 4. Determine if you need to make any changes or take other actions. If so, perform any of the tasks in this table. For details on viewing a case in the Mobile Agent, see Track information requests with the Mobile Agent.
Edit a case	1. From the Information Requests list, open a case. 2. Tap the More actions icon () and select **Edit Case**. For details on the case fields, see Information Request case form.

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Information request agent tasks (continued)

Agent task	Steps
Add comments to a case	1. From the Information Requests list, open a case. 2. Tap the More actions icon () and select **Add Comments**. 3. In the **Work Notes** or **Additional Comments** fields, add your work notes or comments about the case. You can also add comments through the activity stream related list. For more information, see Using the activity stream in the Mobile Agent.
Propose a solution for a case	1. Tap the More actions icon () and select **Propose Solution**. 2. In the **Resolution Code** and **Resolution Notes** fields, add the code and notes that you propose as a solution to resolve the case and then select **Submit**.
Request more information	1. Tap the More actions icon () and select **Request Info**. 2. In the **Additional Comments** field, add more comments about the request.
Escalate a case	1. Tap the More actions icon () and select **Escalate**. 2. In the **Escalations** dialog box, fill in the details of the escalation.
View escalations	1. From the applet launcher, select the **Escalations** applet. 2. View a list of escalations for that case, if any.
Evaluate similar requests	1. Tap the More actions icon () and select **Evaluate similar requests**. 2. In the **Escalations** dialog box, fill in the details of the escalation.

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Information request agent tasks (continued)

Agent task	Steps
Send for Requester Approval	1. Tap the More actions icon (⋯) and select **Send for Requester Approval**. 2. In the **Send for Requester Approval** dialog box, fill in the details of the escalation.
Request Fee Approval	1. Tap the More actions icon (⋯) and select **Request Fee Approval**. 2. In the **Escalations** dialog box, fill in the details of the escalation.
View Exemption Checklist	1. From the applet launcher, select the **Exception Checklist** applet. 2. Review the list of exemptions under the Freedom of Information Act (FOIA) or Public Records Act, and select one or more exemptions if applicable.
Close a case	1. Tap the More actions icon (⋯) and select **Close Case**. 2. In the **Resolution Code** and **Resolution Notes** fields, enter the code and your notes about how the case was resolved.
Cancel a case	Tap the More actions icon (⋯) and select **Cancel Case**.

Using the activity stream in the Mobile Agent

If you're a government service agent, you can access the activity stream from within the case card in the Mobile Agent. You can also communicate with requesters and make internal notes about the work on a record, which means that you can relay and track information more efficiently.

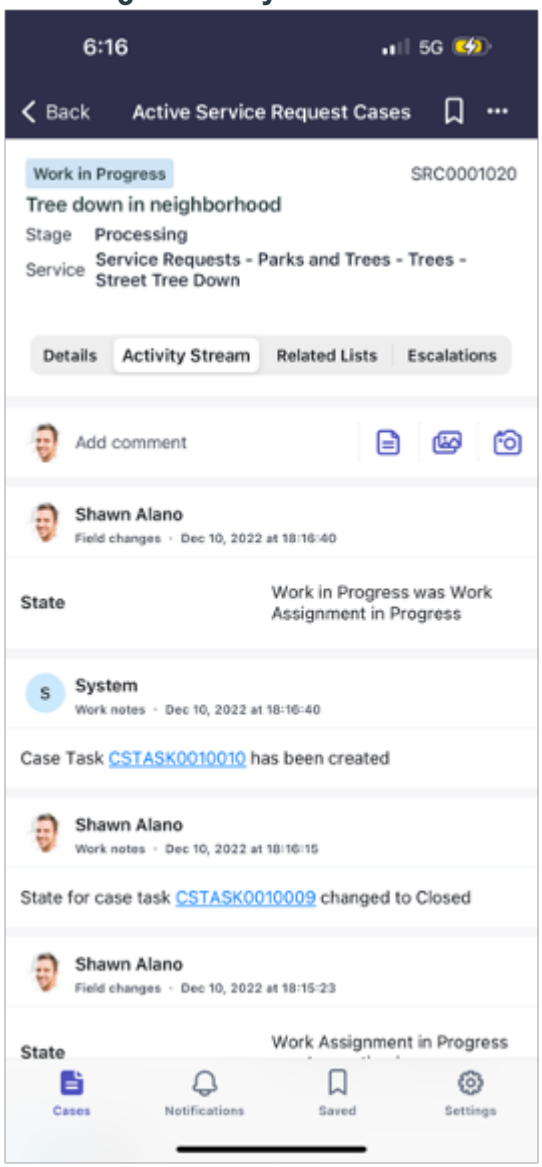
Using the activity stream

As an agent, you can use the activity stream to communicate with constituents and track the information on a record. You can access the activity stream by selecting the activity stream related list.

The following example shows the activity information view for a record in the Mobile Agent.

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Mobile Agent activity stream



Agent tasks in the mobile activity stream

The following table lists the tasks that you can do in the activity stream in the Mobile Agent.

Agent tasks

Task	Description
View comments, attachments, or case tasks for the case	Scroll through the Activity Stream section to view all comments, attachments, and case tasks that are associated with the service or information request case.
Add work notes or comments	1. Select **Add comment**. 2. In the Compose section, add the information to the text field.

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Agent tasks (continued)

Task	Description
	3. (Optional) Select the check box to make the comment or work note publicly visible. 4. Select **Post**. The post is added to the Activity section. Internal work notes are private and are only visible to other agents. External comments are visible to agents and requesters.
Add photos or attachments	• Select the document icon ( ) to attach a document to the case. • Select the camera icon to take a photo to attach to the case. • Select the gallery icon ( ) to attach an existing photo to the case.

Track government service requests with the Mobile Agent app

Track and view the details of all the service requests that are assigned to you by using the ServiceNow Mobile Agent app.

Before you begin

Role required: sn_gsm.agency_manager, sn_gsm.government_service_manager, sn_gsm.constituent_agent, sn_gsm.business_agent, sn_gsm.agency_constituent_agent, or sn_gsm.agency_agent

About this task

When you select a case in the Mobile Agent application, a form opens with the following sections:

- The case details, including the case number, priority, and status.
- A record of the interaction between the user and the government service agent.
- The action that must be taken on the user's part, such as accepting or rejecting a solution.
- Any attached files.

Procedure

1. Open the ServiceNow Mobile Agent app.
2. Under **My Cases**, select one of the applets in the following table.

Service Request Applet List

Applet	Description
New Service Request Cases	All service request cases that the agent has access to in the **New** state.

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Applet	Description
Active Service Request Cases	All service request cases that the agent has access to that have not yet been resolved or canceled. These cases could be in the **Open**, **Awaiting Info**, or **Resolved** states.

3. Select the service request case that you want to see more details for.
   For a detailed description of the service request case fields, see Service Request case form.

Track information requests with the Mobile Agent

Track and view the details of all the information requests that are assigned to you by using the Mobile Agent on your mobile device.

Before you begin

Role required: sn_gsm.agency_manager, sn_gsm.government_service_manager, sn_gsm.constituent_agent, sn_gsm.business_agent, sn_gsm.agency_constituent_agent, or sn_gsm.agency_agent

About this task

When you select a case in the Mobile Agent app, a form opens with the following sections:

- The case details, including the case number, priority, and status.
- A record of the interaction between the user and the information request case agent.
- The action that must be taken on the user's part, such as accepting or rejecting a case outcome.
- Any attached files.

Procedure

1. Open the ServiceNow Mobile Agent.
2. Under **My Cases**, select one of the applets in the following table.

Information Request Applet List

Applet	Description
New Information Request Cases	All information request cases that the agent has access to in the **New** state.
Active Information Request Cases	All information request cases that the agent has access to that aren't resolved or canceled. These cases could be in the **Open**, **Awaiting Info**, or **Resolved** states.

3. Select the information request case that you want to see more details for.
   For a detailed description of the information request case fields, see Information Request case form.

Using Service Exchange for Public Sector Digital Services

As a government service agency provider, learn how to use Service Bridge to receive and fulfill service requests from the service catalog from your provider instance.

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As an agency provider, you can author and publish remote catalogs from your instance for consumers to generate service requests that can be fulfilled in your instance. You can also integrate your tasks with your consumer's tasks, sending them back and forth for fulfillment, as well as send cases to your consumer's instance via Provider Task.

Service Bridge service requests are initiated from the constituent's ServiceNow instance, viewed through the Government Service Portal. The agency provider's agent fulfills these requests in their ServiceNow agency provider instance. The data in the request then synchronizes the agent and customer instances so that they both can track its progress.

Using Service Exchange for consumers

As a constituent using a Service Exchange for consumers instance, you can:

- Review remote catalog items entitled to you from your local catalog and send requests to your agency provider for fulfillment.
- Bidirectionally integrate your tasks with your agency provider's tasks.
- Receive proactive tasks from providers for transparency and collaboration.

Using Service Exchange for providers

As a provider, learn how to use Service Exchange to fulfill requests from the service catalog, and track order fulfillment from your agency provider instance.

As a provider, you can:

- Author and publish remote service catalogs for your consumers on their instances.
- Integrate your instance with your consumer's instance.
- Receive and fulfill service requests on your instance from your constituent's ServiceNow instance.

As a provider, you must first create and publish the remote service catalog and remote task definitions that your constituents can use for creating a remote task. You entitle these definitions to your constituents, who can adjust the mappings and field data rules, or simply activate the definition. Your constituents can apply a trigger on the definition or manually create a remote task for you, the provider, based on an active definition.

Remote Catalog items are ordered from the consumer instance, and create provider tasks in both the provider and consumer instance. The provider agent fulfills these provider tasks in their ServiceNow instance. The data in these tasks is synchronized between instances so that they both can track the progress.

The process for agency providers to create a remote catalog is as follows:

1. Create a remote record producer in a remote catalog. For information on how to do this, see Create a remote record producers in a remote catalog in Service Exchange for Providers.
2. Create variables for remote record producers. For information on how to do this, Create variables for remote record producers in Service Exchange for Providers.
3. Associate flows to the record producers.

Remote tasks enable you to assign and synchronize the task's data on separate instances so that you can quickly fulfill the service requests from your constituents. Some examples of the consumer requests are as follows:

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1. Request help for issues that your constituents are having.
2. Request to assign the existing tasks to you so that you can support your constituent's issues.

For information on how to create a remote task definition that triggers the assignment of a remote task, see Create a remote task definition in Service Exchange for Providers.

Service Exchange request fulfillment process

1. The constituent selects a Service Bridge related item from the service catalog.
2. The consumer provides the information in the Service Exchange request form and selects **Submit**. When the consumer places the request, the Task View appears on the portal. Within the view, the constituent can add comments that are replicated in the agency provider's instance.
3. In the constituent's instance, a single tracking task type, the Provider Task, is generated, regardless of the service.
4. The Provider Task is replicated on the agency provider's instance, triggering a flow that triggers the parent task.
5. The state of the task in the constituent's instance is set to **Received**.
6. In the agency provider's instance, an agent takes ownership of the parent task by selecting **Assign to me**.
7. After an agent takes ownership of the task, the state of the Provider Task in the constituent's instance is updated to **Work in Progress**. When the agent posts a comment on the agency provider's instance, the comment is replicated in the constituent's instance. Comments that the constituent posts are replicated in the provider's instance.
8. After the agent resolves the request, sets a resolution code, and selects **Propose solution**, the state of the Provider Task in the consumer's instance is updated to **Resolved**. The Actions menu displays the following options, Accept, Reject, or Cancel.
9. If the consumer accepts the resolution, the state of the provider task on the constituent's instance, and the state of the request on the agency provider's instance, are both updated to **Closed**.

Use Cases

- Licensing Example: A state uses both provider and consumer instances of Service Exchange. Users in the consumer instance need to access specific content or complete tasks in the provider instance. With Remote Content Items, users can click on a catalog item in the consumer instance, which opens a new tab and logs them into the provider instance to complete the task seamlessly.
- Integration Example: Users clicking on a catalog item in the consumer instance, which opens a new tab and logs them into the provider instance to complete the task. This ensures that users can perform tasks across different instances without any interruptions.

Using Document Processor

The Public Sector Digital Services integration with the Financial Services Operations Document Processor enables other Public Sector applications to collect and verify documents that are used in workflows across the Public Sector workspace.

You can submit documents for verification and track document uploads, helping to improve efficiency of document-based workflows in Public Sector.

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This application is automatically installed when you install the following Public Sector Digital Services playbooks and applications:

- Grants Management
- Social Benefits Playbook
- License and Permit Playbook

An admin can use Document Templates to create HTML and PDF document templates, which can be used to generate standard letters or documents. The templates can be used to automate and simplify the process of filling out, signing, and reviewing documents online. For more information, see Document Templates.

Admins can also integrate documents with 3rd party e-signature providers like DocuSign and Adobe Sign. For more information, see Document Template integration with Docusign or Document Template integration with AdobeSign.

The Document Processor plugin is the foundation for document activities, installed automatically when you install the above plugins or applications. All document activities, components, and flows created by Public Sector Digital Services are part of the Service Applicant Information plugin. For more information on the Service Applicant Information plugin, see Plugins installed with Public Sector Digital Services Core.

Analytics and Reporting Solutions for Public Sector Digital Services

Platform Analytics Solutions contain prepackaged Platform Analytics content for use with other ServiceNow AI Platform products. This Platform Analytics Solution provides KPIs and benchmarks to measure the government services provided to constituents.

Required roles

The following roles and tasks are associated with this Solution:

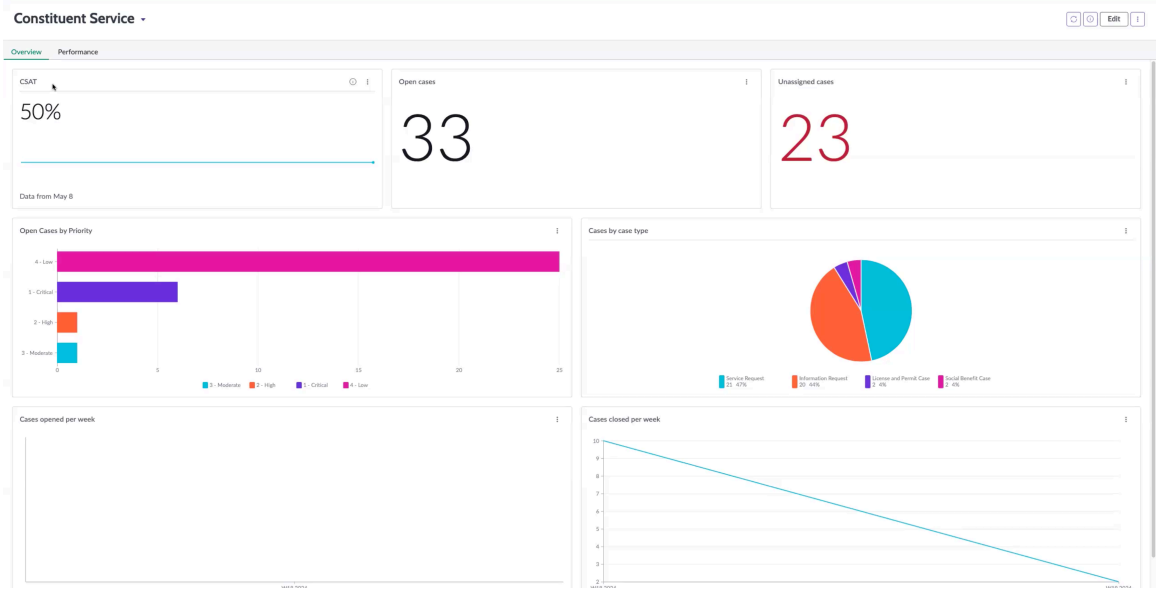
- ServiceNow AI Platform administrator (admin): Install and activate this Analytics and Reporting Solution and make any necessary changes to system properties.
- Platform Analytics administrator (pa_admin): Review the indicators, breakdowns, widgets, and dashboards. Set up and start data collection. Share the dashboards with appropriate stakeholders.

Constituent Service dashboard

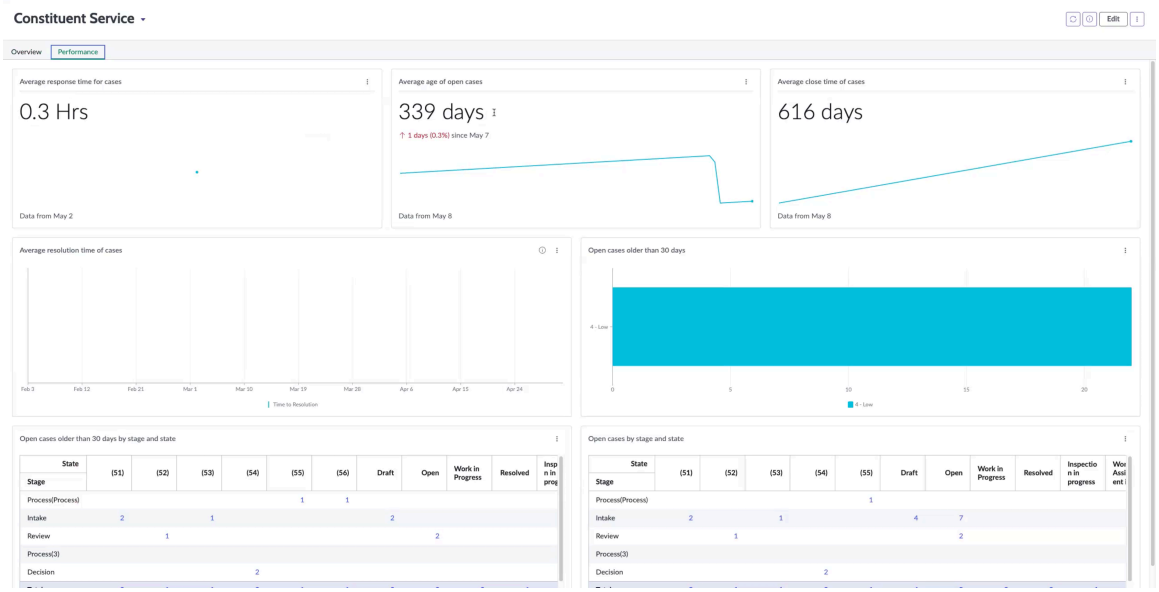
Use this dashboard to monitor the health of citizen services, gain insights on how efficiently government cases are handled, and assess the overall performance of services offered.

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Constituent Service Dashboard Overview tab



Constituent Service Dashboard Performance tab



Required ServiceNow AI Platform roles

- sn_gsm.constituent_agent, required to view the dashboard widgets and data.
- sn_gsm.constituent_admin, required to edit the dashboard.

Access the Constituent Service dashboard

To open the dashboard, navigate to **All** > **Platform Analytics** > **Library** > **Dashboards**.

Use cases

For examples of how different people in your organization would use this dashboard, see these use cases.

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Constituent Services Dashboard Use cases

User	Dashboard use
Admin or agent	Creates and monitors cases from constituents to accelerate case resolution and increase customer satisfaction. Does the following: • Tracks cases that have been open for a period of time. • Monitors the number of cases for a certain type of service type. • Reviews the average closing time of cases for each service type. • Drills down into details of cases for specific service types.
Government service manager	Monitors the health of government services. Tracks case resolution to drive improvements in service delivery processes and agent performance.

Indicators

Average response time for cases

Average hours for agents to respond to a new government case. This score is calculated by using this formula: [[GSM-Summed duration of FirstResponseTime]] / [[GSM-Number of Responded Cases]]

GSM-Number of Open Cases

Number of open cases created daily.

GSM-CSAT

Customer satisfaction score based on survey results. The score is calculated by using this formula: [[GSM_Number of satisfied customers (CSAT)]]/[[GSM_Number of CSAT survey respondents]]*100.

GSM-Average close time of cases

Average number of days to close cases. This score is calculated by using this formula: [[GSM-Summed duration of closed cases]] / [[GSM-Number of closed cases]] / 24.

GSM-Average age of open cases

Average number of days that cases remain open. The score is calculated by using this formula: [[GSM-Summed age of open cases]] / [[GSM-Number of Open Cases]] / 24.

Average resolution time of cases

Average number of days to resolve cases. The score is calculated using this formula: [[GSM_Summed duration of resolved cases]] / [[GSM_Number of resolved cases]] / 24

GSM-Case Average Response Time

Average length of time for an agent to respond to a case. The score is calculated using this formula: [[GSM-Summed duration of FirstResponseTime]]/[[GSM-Number of Responded Cases]].

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GSM_Number of resolved cases

Daily count of government cases resolved. The goal for this indicator is to maximize the count.

GSM-Number of closed cases

Daily count of closed cases.

GSM-Number of Responded Cases

Daily count of cases to which agents responded.

The following indicators are not shown directly on the dashboard but are used in calculating formulas:

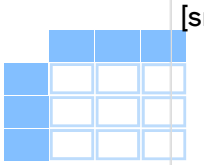
- GSM-Summed duration of closed cases (hours)
- GSM-Summed duration of FirstResponseTime (hours)
- GSM-Summed age of open cases
- GSM-Summed duration of resolved cases (hours)

Breakdowns

- GSM-Account
- GSM-Age
- GSM-AssignedTo
- GSM-AssignmentGroup
- GSM-Category
- GSM-Channel
- GSM-Contact
- GSM-Priority
- GSM-Product
- GSM-State

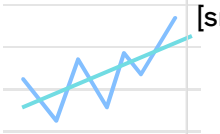
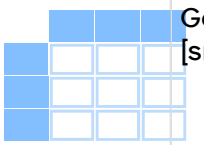
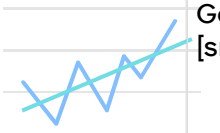
Data visualizations

Constituent Services Dashboard Data visualizations

Title	Type	Source table	Description
Open cases older than 30 days by stage and state	 Pivot	Government Service Case [sn_gsm_government_service_case]	Detailed summary of open cases older than one month, arranged by stage and state.

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Constituent Services Dashboard Data visualizations (continued)

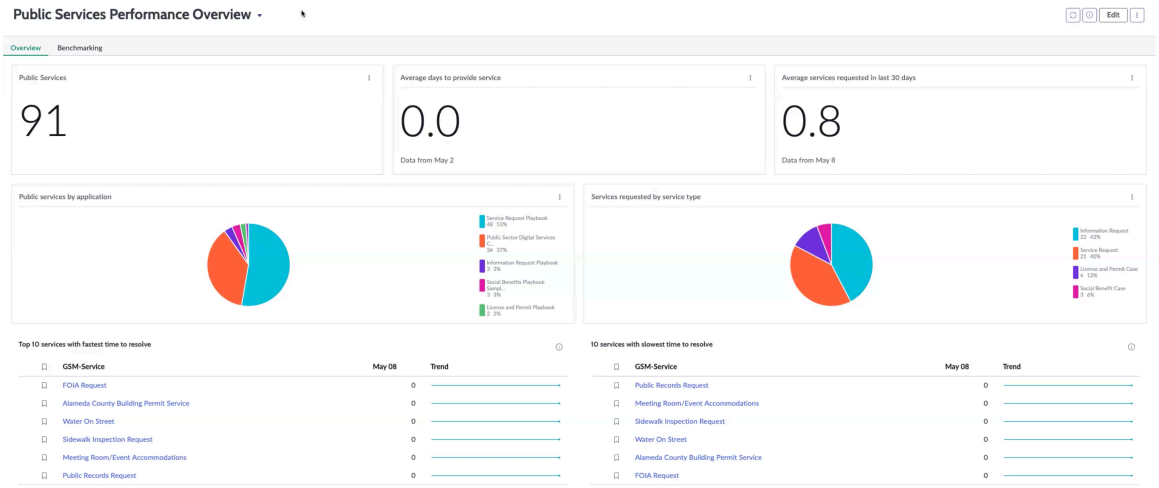
Title	Type	Source table	Description
Open cases	 Score	Government Service Case [sn_gsm_government_service_case]	Total number of unresolved government cases in the system.
Cases opened per week	 Line	Government Service Case [sn_gsm_government_service_case]	Weekly trend of new government cases opened.
Open cases older than 30 days	Horizontal bar	Government Service Case [sn_gsm_government_service_case]	Distribution of government open cases older than 30 days.
Unassigned cases	 Score	Government Service Case [sn_gsm_government_service_case]	Total number of government cases not yet assigned to agents.
Cases by case type	Pie	Government Service Case [sn_gsm_government_service_case]	Percentage of government cases by case type.
Open cases by stage and state	 Pivot	Government Service Case [sn_gsm_government_service_case]	Detailed summary of open government cases, arranged by stage and state.
Cases closed per week	 Line	Government Service Case [sn_gsm_government_service_case] Line	Weekly trend in government cases closed by agents.
Open Cases by Priority	Horizontal bar	Government Service Case [sn_gsm_government_service_case]	Distribution of unassigned government cases by priority.

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Public Services Performance Overview dashboard

Use the Public Services Performance Overview dashboard to assess key performance indicators and data visualizations on public services offered to and requested by constituents, businesses, and agencies.

Public Services Performance Overview - Overview tab



Public Services Performance Overview - Benchmarking tab



Required ServiceNow AI Platform roles

- sn_gsm.service_offered_viewer, required to view the dashboard widgets and data.
- sn_gsm.service_offered_admin, required to edit the dashboard.

Access the Public Services Performance Overview dashboard

To open the dashboard, navigate to **All** > **Platform Analytics** > **Library** > **Dashboards** > **Public Services Performance Overview**.

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Use cases

For examples of how different people in your organization would use this dashboard, see these use cases.

Public Services Performance Overview dashboard Use cases

User	Dashboard use
Admin	Reviews benchmarking information to track the public services offered to and requested by constituents, businesses, and agencies.
Government service manager, service viewer,and owner	Monitors the public services offered to and requested by constituents, businesses, and agencies. Does the following: • Observes short and long-term trends and patterns in service delivery. • Identifies opportunities to improve case resolution, agent performance, and the service experience.

Indicators

GSM-Government Case Count for Services requested

Daily number of government services requested by constituents, businesses, and agencies.

GSM-Average of Government Case for Services requested

Daily average of government cases for services requested by constituents, businesses, and agencies. The average is calculated by using this formula: [[GSM-Government Case Count for Services requested]]/30.

GSM-Average resolution duration of Government Cases

Average number of days to resolve government cases.

GSM-Average number of services provided each week by service type

Average count of government services requested each work, by type of service. The count is calculated by using this formula: [[GSM-Average days to provide services by service type]]/7.

GSM-Average resolution duration of Government Cases in last 365 days

Average number of days to resolve government cases in the last 12 months.

GSM-Avg number of services requested each week by service type

Average count of government services requested weekly by service type. The count is calculated by using this formula: [[GSM-Count of services requested each week by service type]]/7.

GSM-Count of services requested each week by service type

Average number of government services requested each week, by service type. Measured daily.

GSM-Average days to provide services by service type

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Count of government services provided each week by type of service. Measured daily.

GSM-Government Services with fastest/slowest time to resolve

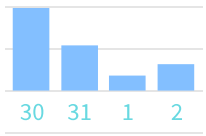
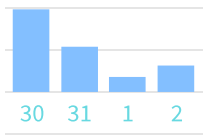
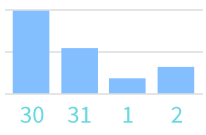
Government services that have the quickest and slowest resolution times.

Breakdowns

- GSM-AssignmentGroup
- GSM-Government.ServiceOffered.Type
- GSM-Product
- GSM-State

Data visualizations

Public Services Performance Overview dashboard Data visualizations

Title	Type	Source table	Description
Top 10 services requested in the last 30 days		Government Service Case [sn_gsm_government_service_case]	Top 10 requested services over a 30-day (monthly) period.
Top 10 services with most open cases in last 7 days		Government Service Case [sn_gsm_government_service_case]	Top 10 requested services over a seven-day (weekly) period.
Top 10 services requested in the last 6 months		Government Service Case [sn_gsm_government_service_case]	Top 10 requested services over a 6-month period.
Services requested by service type	 Pie chart	Government Service Case [sn_gsm_government_service_case]	Distribution (percentage) of government services requested by constituents, businesses, and agencies.
Public Services		Service Definition [sn_case_type_selection]	Total number of all government services available in the system.

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Public Services Performance Overview dashboard Data visualizations (continued)

Title	Type	Source table	Description
Public Services by application	 Pie chart	Service Definition [sn_case_type_selection]	Distribution (percentage) of government services available in the system.

Public Sector Digital Services reference

Reference topics provide additional information about Public Sector Digital Services.

Reference information	Links to topics
Public Sector Digital Services lists and forms	• Public Sector Digital Services Core Case Forms • Public Sector Digital Services Core Profile Forms
Components installed with Public Sector Digital Services applications	• Components and Roles installed with Public Sector Digital Services Core • Roles installed with Public Sector Digital Services • Persona-based Roles in Public Sector Digital Services • Plugins installed with Public Sector Digital Services Core • Properties installed with Public Sector Digital Services
Data Model and catalog topics	• Public Sector Digital Services Data Model • Public Sector Digital Services Core Role Relationships • Government Service Portal service catalog

Public Sector Digital Services Data Model

Learn about the Public Sector Digital Services application by viewing data model and role relationship diagrams. These diagrams show the relationships between the tables and roles within the application and provide an overall picture of how the Public Sector Digital Services application operates.

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Public Sector Digital Services Data model

The flexibility of the Public Sector Digital Services platform provides you with data models that you can extend and leverage to fit your needs.

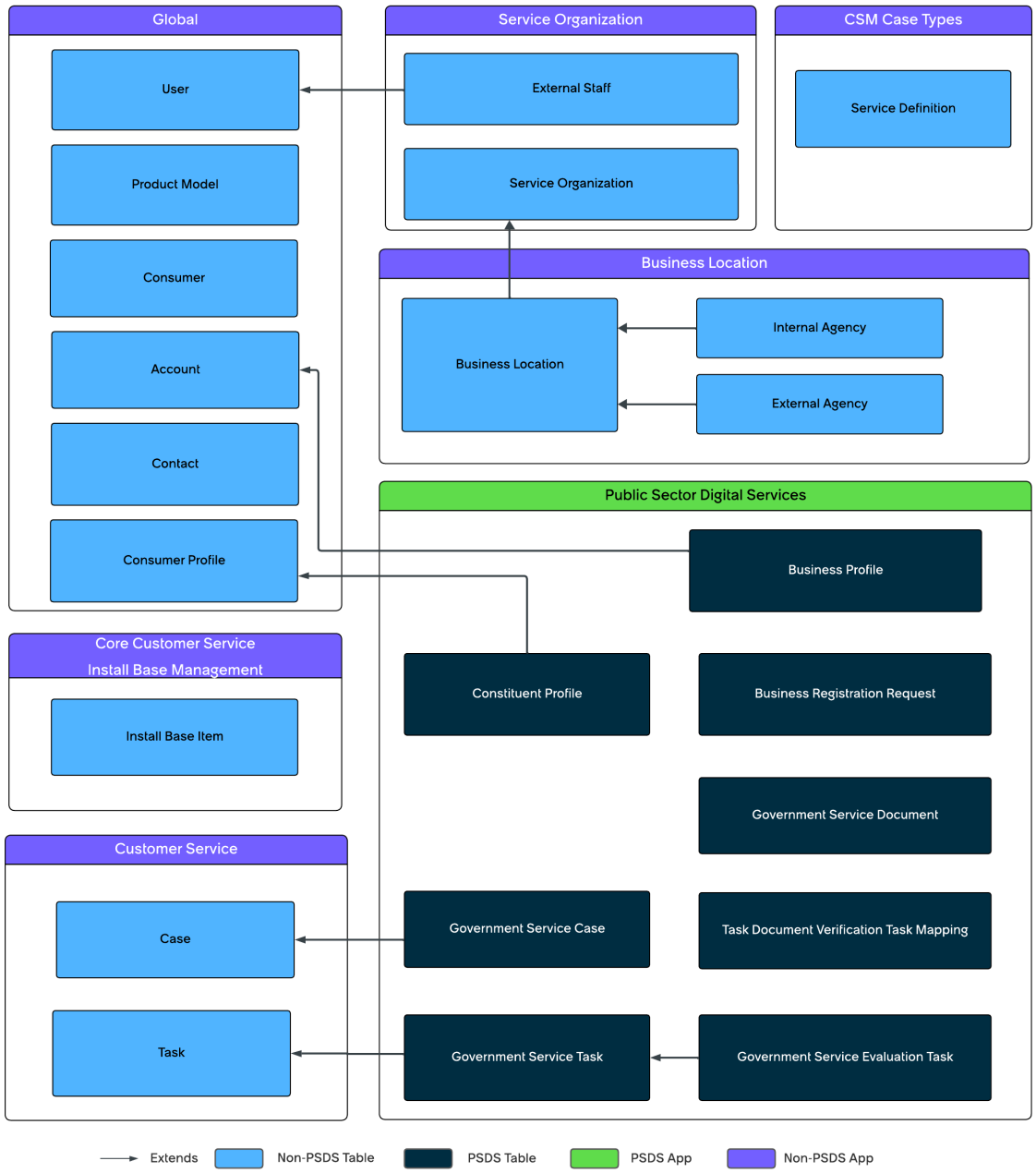
Public Sector Digital Services Core Data Model

Public Sector Digital Services Core application provides a framework to enable institutions to organize and manage their data effectively to meet their business needs. This section introduces Public Sector Digital Services Core and explains its purpose and key data design components.

Use the enhanced install base data model to provide authorized users with additional roles to access (read or update) cases, agency location items, and all install base items.

The following logical diagram shows the tables and their relationships that build the Public Sector Digital Services Core data model.

Public Sector Digital Services Core Data Model



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Tables and Flows installed with Public Sector Digital Services Core

This section describes the tables and flows installed with the Public Sector Digital Services Core application and shows how they store and manage information.

Public Sector Digital Services Core tables installed

Public Sector Digital Services Core tables

Table	Description	Extends Table
Government Service Case	Contains records of individual cases related to government services, tracking requests, interactions, and resolutions for constituents seeking assistance from government agencies.	Customer Service Case
Government Service Task	Contains tasks associated with government service cases, outlining specific actions to be performed, their status, and assigned personnel.	Customer Service Task
Constituent Profile	Contains detailed profiles of constituents, including personal information, contact details, and engagement history with government services.	Consumer Profile
Business Profile	Contains profiles of businesses interacting with government agencies, documenting registration information, contact details, and service engagements.	None
Business Registration Request	Contains information about new business registration requests.	None
Government Service Document	Contains information about service documents.	Documents
Government Service Evaluation Task	Contains information about service evaluation tasks.	Government Service Task
Task Document Verification Task Mapping	Maps case tasks created for document resubmission requests to the specific Document Verification Tasks that initiated them. Enables tracking and association of flagged documents back to the case task that triggered the resubmission request, supporting cases where multiple documents are flagged for different reasons.	None

Flows installed

Public Sector Digital Services Core flows

Flow	Description
Create blocked by record if Case Task is associated with government case	Creates a blocked by record if the Case Task is associated with a government case.
Create blocked by record if Government case needs customer information	Creates a blocked by record if the Government case needs more customer information.

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Public Sector Digital Services Core flows (continued)

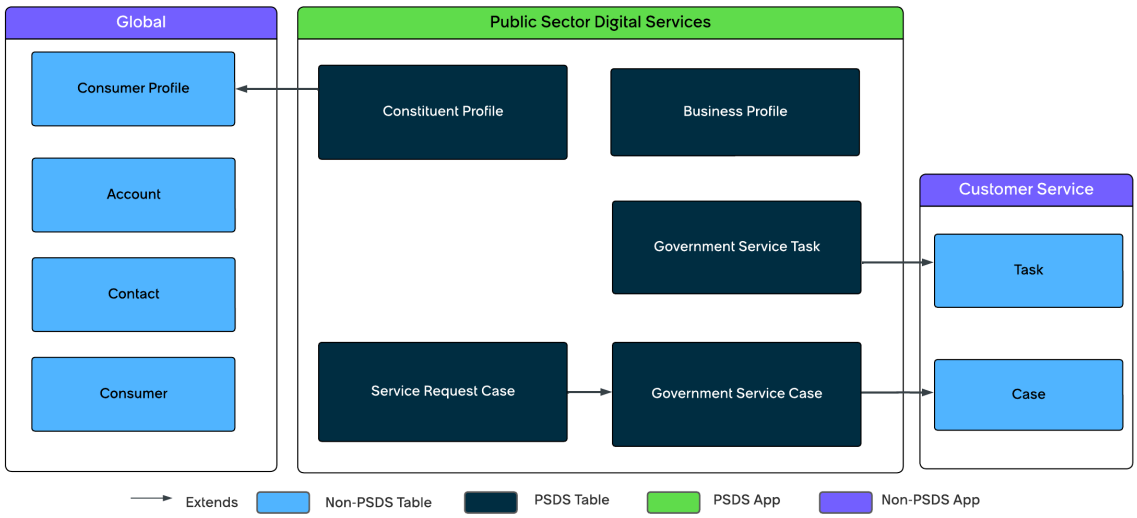
Flow	Description
Resolve blocked by record if Case Task is closed and associated with Government Case	Removes the blocked by record for the associated Government case if the Government case is resolved.
Resolve blocked by record if user information is provided for Government case	Removes the blocked by record if the case task is closed.

Public Sector Digital Services Service Request Playbook Data Model

This section outlines the Service Request Playbook data model and the tables installed with the Service Request application.

The following logical diagram shows the tables and their relationships within the Service Request data model.

Service Request Data Model



Tables installed with Service Request Playbook

This section describes the tables installed with the Service Request Playbook application and shows how they store and manage information.

Service Request tables installed

Public Sector Digital Services Service Request Playbook tables

Table	Description	Extends Table
Service Request	Contains records of individual cases related to government services, tracking requests, interactions, and resolutions for constituents seeking assistance from government agencies.	Government Service Case
Government Service Case	Contains records of individual cases related to government services, tracking requests, interactions, and resolutions for constituents seeking assistance from government agencies.	Customer Service Case

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Public Sector Digital Services Service Request Playbook tables (continued)

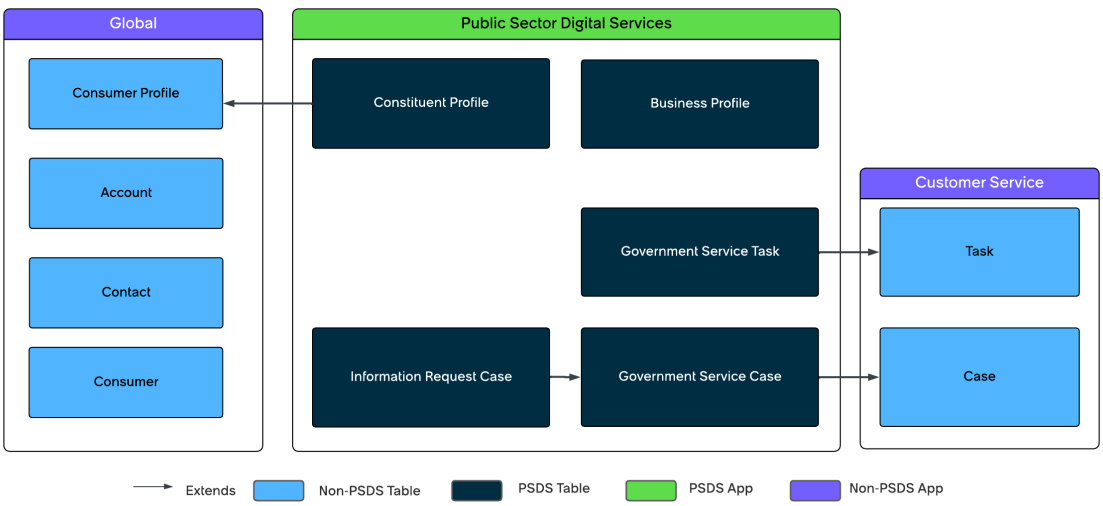
Table	Description	Extends Table
Government Service Task	Contains tasks associated with government service cases, outlining specific actions to be performed, their status, and assigned personnel.	Customer Service Task
Constituent Profile	Contains detailed profiles of constituents, including personal information, contact details, and engagement history with government services.	Consumer Profile
Business Profile	Contains profiles of businesses interacting with government agencies, documenting registration information, contact details, and service engagements.	N/A
Business Registration Request	Contains information about new business registration requests.	N/A
Government Service Document	Contains information about service documents.	Documents
Government Service Evaluation Task	Contains information about service evaluation tasks.	Government Service Task

Public Sector Digital Services Information Request Administration Data Model

This section outlines the Information Request data model and the tables installed with the Information Request application.

The following logical diagram shows the tables and their relationships within the Information Request data model.

Information Request Data Model



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Tables and Flows installed with Information Request Administration

This section describes the tables installed with the Information Request Administration application and shows how they store and manage information.

Information Request tables installed

Public Sector Digital Services Information Request tables

Table	Description	Extends Table
Information Request	Contains records of individual cases related to government services, tracking requests, interactions, and resolutions for constituents seeking assistance from government agencies.	Government Service Case
Government Service Case	Contains records of individual cases related to government services, tracking requests, interactions, and resolutions for constituents seeking assistance from government agencies.	Customer Service Case
Government Service Task	Contains tasks associated with government service cases, outlining specific actions to be performed, their status, and assigned personnel.	Customer Service Task
Constituent Profile	Contains detailed profiles of constituents, including personal information, contact details, and engagement history with government services.	Consumer Profile
Business Profile	Contains profiles of businesses interacting with government agencies, documenting registration information, contact details, and service engagements.	N/A
Business Registration Request	Contains information about new business registration requests.	N/A
Government Service Document	Contains information about service documents.	Documents
Government Service Evaluation Task	Contains information about service evaluation tasks.	Government Service Task

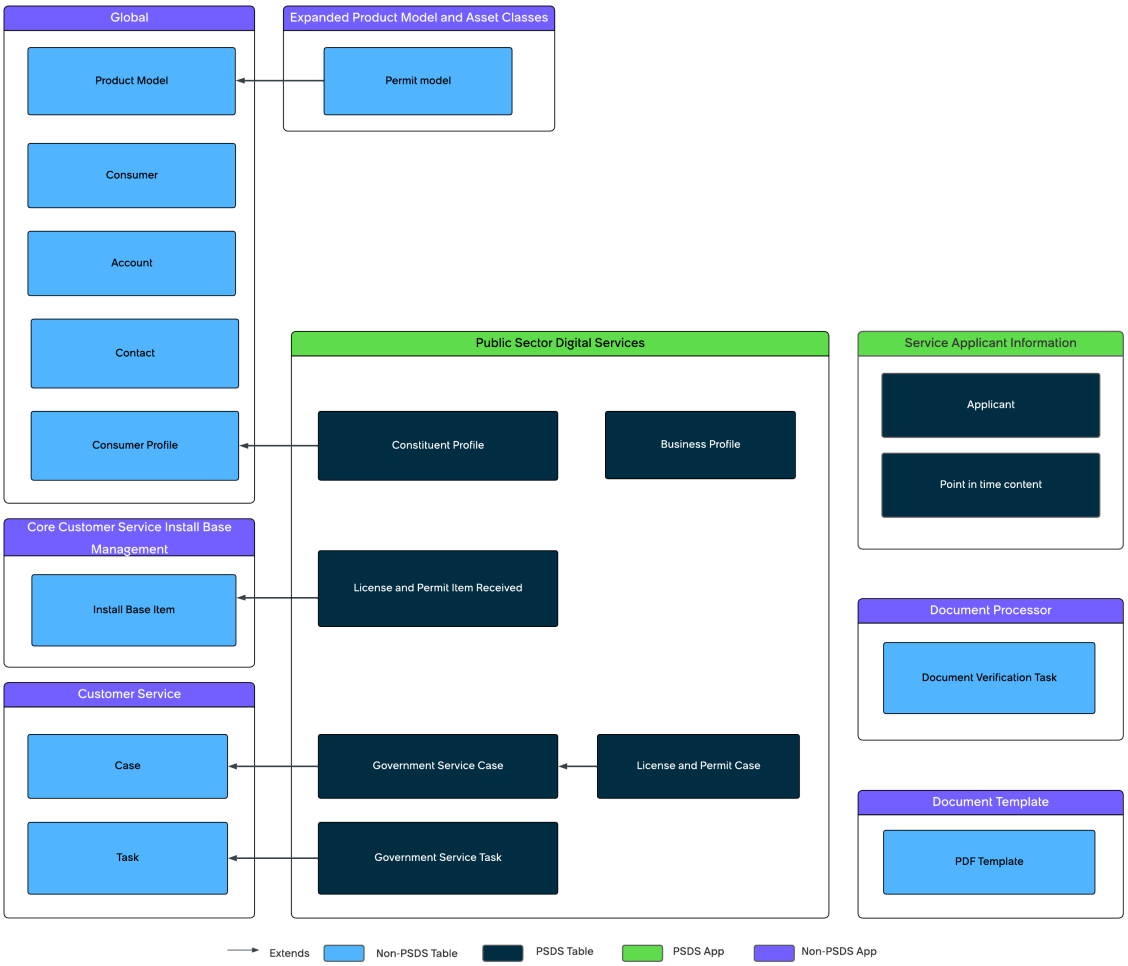
Public Sector Digital Services License and Permit Playbook Data Model

This section outlines the License and Permit data model and the tables installed with the License and Permit application.

The following logical diagram shows the tables and their relationships within the License and Permit data model.

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License and Permit Data Model



Tables installed with License and Permit Playbook

This section describes the tables installed with the License and Permit Playbook application and shows how they store and manage information.

License and Permit tables installed

Public Sector Digital Services License and Permit tables

Table	Description	Extends Table
License and Permit Case	Contains cases related to applications for licenses and permits, tracking application status, required documentation, and approval steps.	Government Service Case
Government Service Case	Contains records of individual cases related to government services, tracking requests, interactions, and resolutions for constituents seeking assistance from government agencies.	Customer Service Case
Government Service Task	Contains tasks associated with government service cases, outlining specific actions to be performed, their status, and assigned personnel.	Customer Service Task

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Public Sector Digital Services License and Permit tables (continued)

Table	Description	Extends Table
Constituent Profile	Contains detailed profiles of constituents, including personal information, contact details, and engagement history with government services.	Consumer Profile
Business Profile	Contains profiles of businesses interacting with government agencies, documenting registration information, contact details, and service engagements.	N/A
Business Registration Request	Contains information about new business registration requests.	N/A
Government Service Document	Contains information about service documents.	Documents
Government Service Evaluation Task	Contains information about service evaluation tasks.	Government Service Task
License and Permit Item Received	Contains the details of license and permit items that have been issued or received, including item identifiers, issuance dates, and recipient information.	Install Base Item

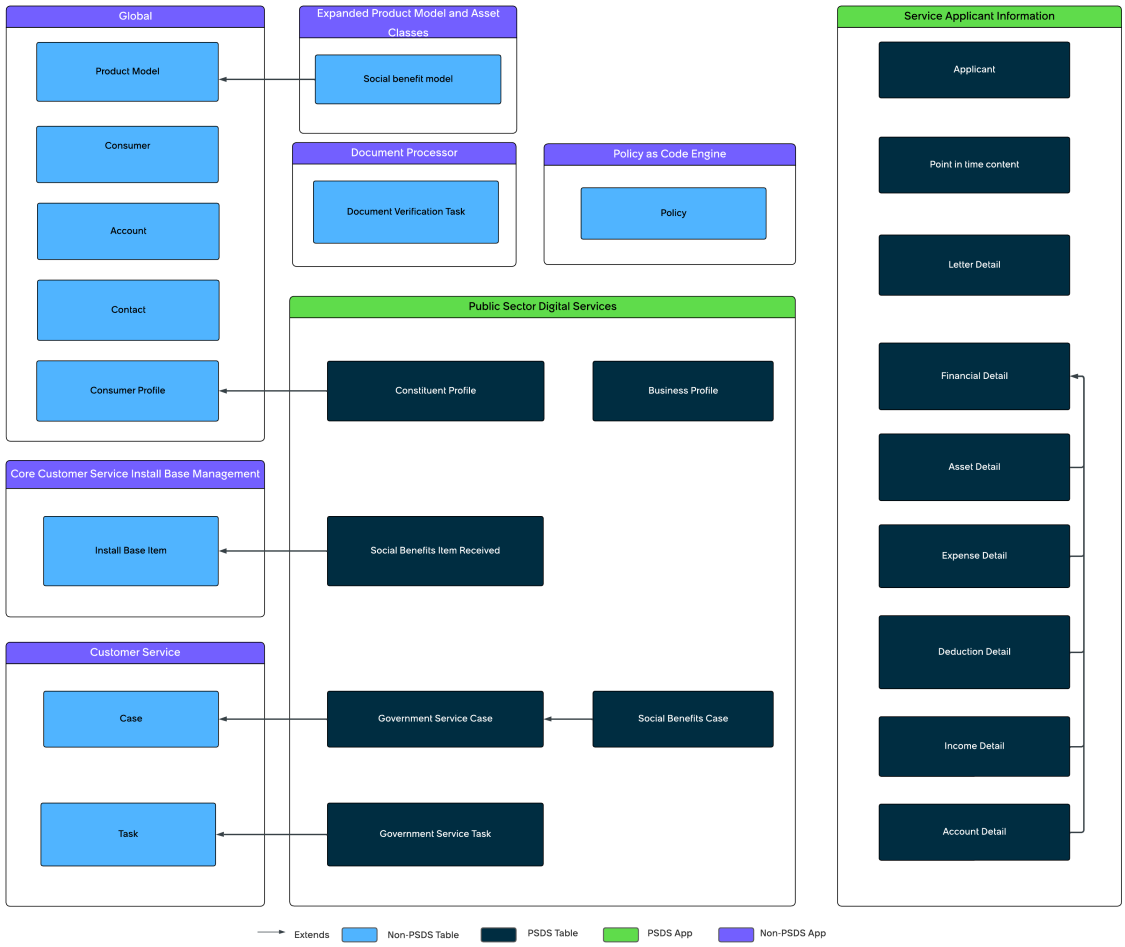
Public Sector Digital Services Social Benefits Data Model

This section outlines the Social Benefits data model and the tables installed with the Social Benefits application.

The following logical diagram shows the tables and their relationships within the Social Benefits data model.

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Social Benefits Data Model



Tables installed with Social Benefits Playbook

This section describes the tables installed with the Social Benefits Playbook application and shows how they store and manage information.

Social Benefits tables installed

Public Sector Digital Services Social Benefits tables

Table	Description	Extends Table
Social Benefits Case	Contains cases involving social benefit applications or claims, capturing information about eligibility, application process, and benefit disbursement.	Government Service Case
Government Service Case	Contains records of individual cases related to government services, tracking requests, interactions, and resolutions for constituents seeking assistance from government agencies.	Customer Service Case
Government Service Task	Contains tasks associated with government service cases, outlining specific actions to be performed, their status, and assigned personnel.	Customer Service Task
Constituent Profile	Contains detailed profiles of constituents, including personal information, contact details, and engagement history with government services.	Consumer Profile

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Public Sector Digital Services Social Benefits tables (continued)

Table	Description	Extends Table
Business Profile	Contains profiles of businesses interacting with government agencies, documenting registration information, contact details, and service engagements.	N/A
Business Registration Request	Contains information about new business registration requests.	N/A
Government Service Document	Contains information about service documents.	Documents
Government Service Evaluation Task	Contains information about service evaluation tasks.	Government Service Task
Social Benefits Item Received	Tracks individual social benefit items received by constituents, noting benefit type, amount, and date of issuance.	Install Base Item

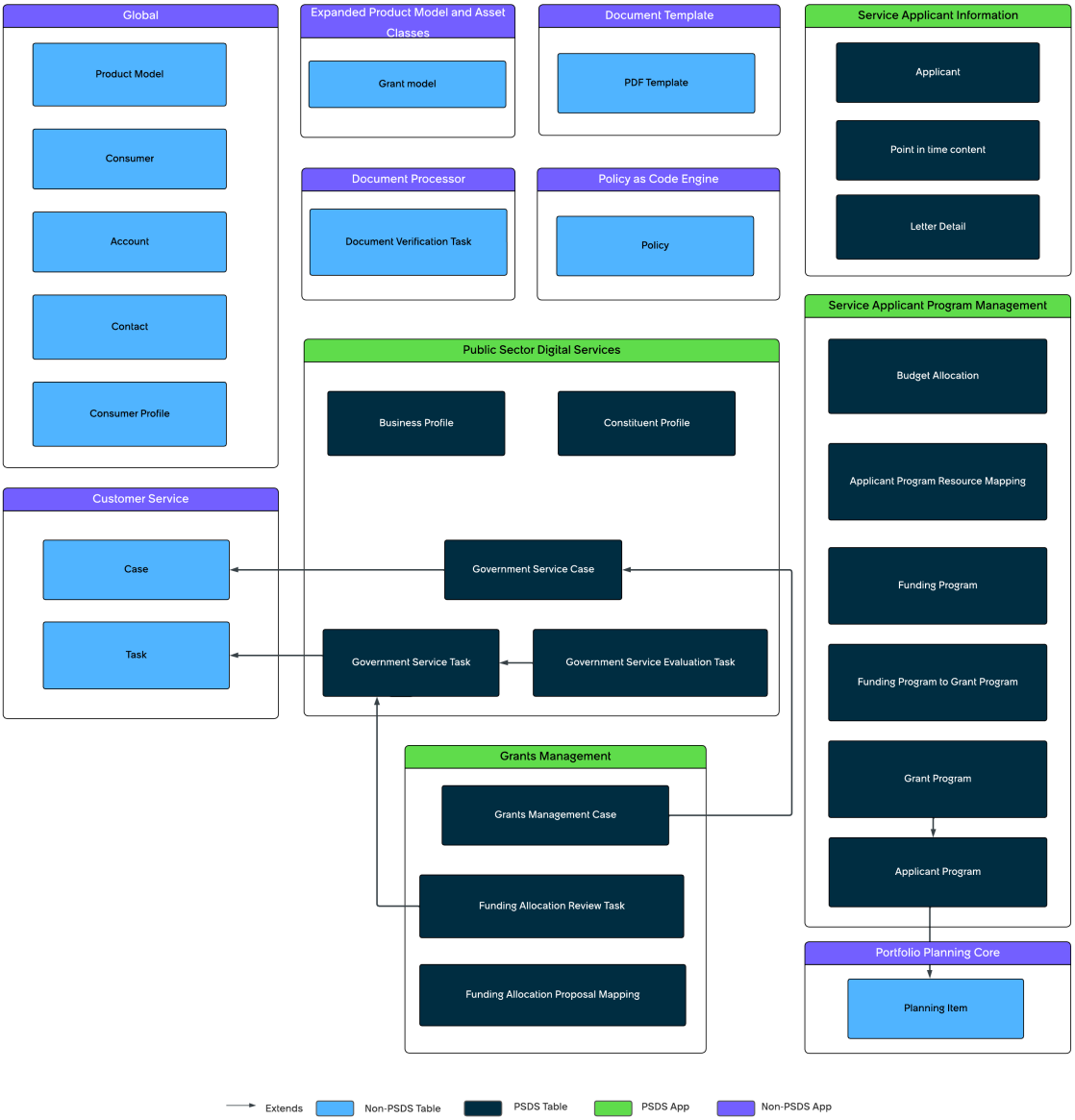
Public Sector Digital Services Grants Management Data Model

This section outlines the Grants Management data model and the tables installed with the Grants Management application.

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Grants Management Data Model



Tables installed with Grants Management

This section describes the tables installed with the Grants Management application and shows how they store and manage information.

Grants Management tables installed

Public Sector Digital Services Grants Management tables

Table	Description	Extends Table
Grants Management Case	Contains cases associated with grant management, including application details, review status, and decision outcomes.	Government Service Case
Funding Allocation Review Task	Captures the recommendation reason and automatically computes the proposal and funding/decline counts along with the total allocated amount.	Government Service Task

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Public Sector Digital Services Grants Management tables (continued)

Table	Description	Extends Table
Funding Allocation Proposal Mapping	Links individual proposals to a Funding Allocation Review Task. A flag indicates whether the proposal is included in the batch or removed during the review.	None
Government Service Case	Contains records of individual cases related to government services, tracking requests, interactions, and resolutions for constituents seeking assistance from government agencies.	Customer Service Case
Government Service Task	Contains tasks associated with government service cases, outlining specific actions to be performed, their status, and assigned personnel.	Customer Service Task
Constituent Profile	Contains detailed profiles of constituents, including personal information, contact details, and engagement history with government services.	Consumer Profile
Business Profile	Contains profiles of businesses interacting with government agencies, documenting registration information, contact details, and service engagements.	None
Business Registration Request	Contains information about new business registration requests.	None
Government Service Document	Contains information about service-related documents required for government service requests and case management.	Documents
Government Service Evaluation Task	Contains information about evaluation tasks for assessing the quality and outcomes of government services provided to constituents.	Government Service Task

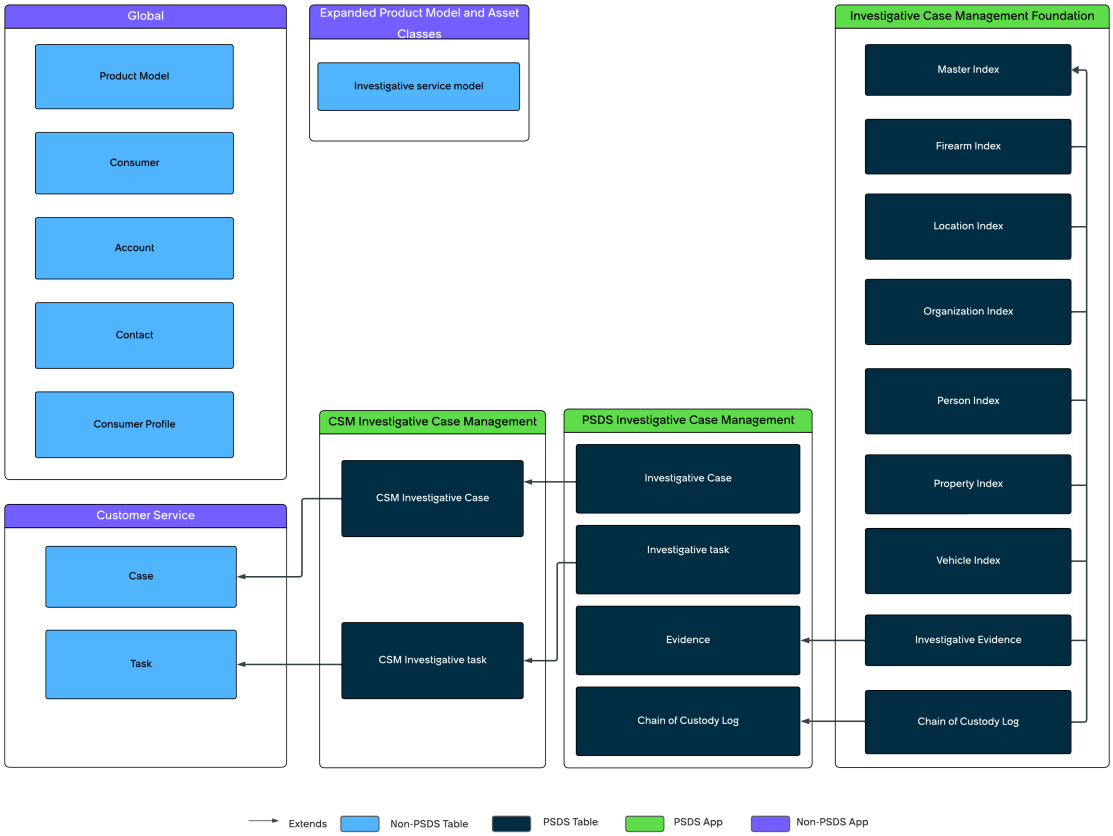
Investigative Case Management Data Model

This section outlines the Investigative Case Management data model and the tables installed with the Investigative Case Management application.

The following logical diagram shows the tables and their relationships within the Investigative Case Management data model.

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Investigative Case Management Data Model



Tables installed with Investigative Case Management

This section describes the tables installed with the Investigative Case Management application and shows how they store and manage information.

Investigative Case Management tables installed

Public Sector Digital Services Investigative Case Management tables

Table	Description	Extends Table
Master Index	Parent table that contains information about all entity records created within the case. All new entities created within the case extend from this index.	N/A
Firearm Index	Contains information about the firearm entity records created within the case.	N/A
Location Index	Contains information about the location entity records created within the case.	N/A
Organization Index	Contains information about the organization entity records created within the case.	N/A
Person Index	Contains information about the person entity records created within the case.	N/A
Property Index	Contains information about the property entity records created within the case.	N/A

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Public Sector Digital Services Investigative Case Management tables (continued)

Table	Description	Extends Table
Vehicle Index	Contains information about the vehicle entity records created within the case.	N/A
Investigative Evidence	Contains information about evidence records within the case. Non-specific to PSDS ICM. Parent table of GSM Evidence [sn_gsm_icm_evidence] table.	Evidence
Chain of Custody Log	Contains the custody log files created each time a piece of evidence is transferred. Non-specific to PSDS ICM. Parent table of GSM Chain of Custody Log [sn_gsm_icm_chain_of_custody] table.	Chain of Custody Log
Investigative Case	Contains information about the investigative case record.	CSM Investigative Case
Investigative Task	Contains information about the investigative tasks records associated with the case.	CSM Investigative Task
Evidence	Contains evidence records created within the case. Specific to PSDS ICM.	N/A
Chain of Custody Log	Contains the custody log files created each time a piece of evidence is transferred. Specific to PSDS ICM.	N/A
CSM Investigative Case	Investigative case parent table. Non-specific to PSDS ICM.	N/A
CSM Investigative Task	Investigative case task parent table. Non-specific to PSDS ICM.	N/A

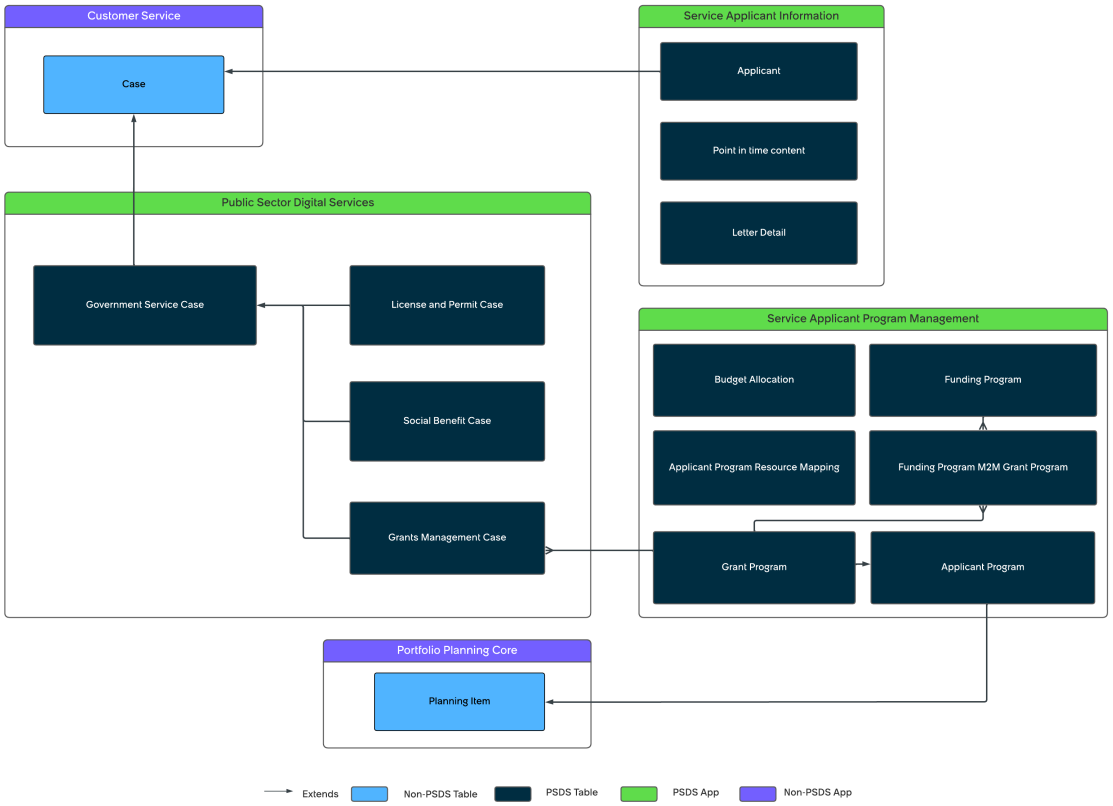
Service Applicant Data Model

This section outlines the Service Applicant data model and the Service Applicant Information and Service Applicant Program Management tables that are installed.

The following logical diagram shows the tables and their relationships that build the Service Applicant Information and Service Applicant Program Management data model.

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Public Sector Digital Services Service Applicant Data Model



Tables installed with Service Applicant Information Plugin

This section describes the tables installed with the Service Applicant Information plugin and shows how they store and manage information. The Service Applicant Information plugin tables focus on capturing detailed applicant data for eligibility assessments, and enable the addition of any supplementary applicants (either constituents or business contacts) to a case or application.

Service Applicant Information Plugin tables installed

Table	Description	Extends Table
Applicant	Contains applicant profile information and relationships to cases or applications.	N/A
Point in time content	Contains applicant information captured at specific moments, preserving historical records for audits, appeals, and compliance requirements.	N/A
Letter Detail	Contains details about correspondence and official communications related to applicants.	N/A

Tables installed with Service Applicant Program Management Plugin

This section describes the tables installed with the Service Applicant Program Management plugin and shows how they store and manage information.

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Service Applicant Program Management Tables

Table	Description	Extends Table
Budget Allocation	Contains budget assignments and fund tracking for programs, including allocation amounts, spending categories, and allocation percentage.	N/A
Applicant Program Resource Mapping	Contains mappings between resources and any records. The resource can be a link, a document, or a knowledge article.	N/A
Grant Program	Contains grant-specific program details, including award amounts, award type, and total award budget allocated.	Applicant Program
Applicant Program	Contains program definitions for applicant-facing initiatives, including descriptions, objectives, eligibility criteria, and application configurations.	Planning Item
Funding Program	Contains portfolio-level funding program definitions used to organize, govern, and track grant funding across one or more grant programs. Stores program details including the funding organization, program timeline, total program budget, and category.	N/A
Funding Program M2M Grant Program	Contains the many-to-many relationship mappings between funding programs and grant programs. Each record links exactly one funding program to one grant program.	N/A

Identity Provider Integration Data Model

The Identity Provider Integration (sn_idp_integ) plugin provides ServiceNow developers the data model foundation to develop OpenID Connect (OIDC) integrations to authenticate and verify constituent identities through approved government OIDC providers — ID.me (US), myID (Australia), GOV.UK One Login (UK) — replacing email-only identification. The Identity Provider Integration standardizes and enhances the identity verification process, delivering a provider-neutral OIDC framework for capturing and storing identity provider data, including identity provider issuer, identity provider ID, and assurance level from OIDC providers.

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Tables installed with Identity Provider Integration

The Identity Provider Integration data model contains the `sn_idp_integration` table, which references the `sys_user` core table. The model supports multiple providers per user, enforces provenance-based downstream field locking, and aligns with global OIDC terminology. These fields use standard, provider-neutral OIDC terminology for consistency across identity providers.

Name	Type	Definition	Example
user	Reference (sys_user)	Matches and identifies the platform user associated with identity-provider account	John.doe@gmail.com
identity_provider_issuer	String (255)	OIDC iss claim. Identifies the external IdP namespace	https://identity.example.gov
identity_provider_id	String (255)	OIDC sub claim. Unique identifier within the issuer namespace	9f3c7d13...c297
identity_assurance_level	Choice	Globalized assurance tier mapped from provider-specific values	IAL1, IAL2, IAL3
active	True/ False	Marks the constituent's current identity-provider association when more than one exists	true

Roles

Identity administrators hold the `identity_admin` role, and caseworkers or other agents who need audit access hold the `agent` role. The `integration` role can be granted only to the MPSSO transform service account.

Identity Provider Integration roles

Role	Grants
identity_admin [sn_idp_integration.identity_admin]	Standard read access to identity-provider records, for admins who manage identity-provider configuration.
agent, record owner [sn_idp_integration.agent]	Standard read access to identity-provider records, for caseworkers or agents who need it to audit or investigate a constituent's identity.
integration [sn_idp_integration.integration]	Write access to the identity table. Granted only to the OIDC provider MPSSO transform service account. This is the only role granted write access to these fields (and their downstream claim-mapped copies on `csm_consumer_user`, `csm_consumer`, `sn_gsm_constituent_profile`, that are also populated by the configured identity provider).

Access Control Lists (ACLs)

The `sn_idp_integration` table uses provenance-based access controls to avoid unauthorized read access to sensitive identity provider data, and to restrict write access to identity data to the MPSSO transform's service account only.

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	Access	Roles
sn_idp_integration: all fields	Read	sn_idp_integration.identity_admin, sn_idp_integration.agent, record owner
sn_idp_integration: all fields	Write	sn_idp_integration.integration
Downstream claim-mapped fields `csm_consumer_user`, `csm_consumer`, `sn_gsm_constituent_profile`	Write	sn_idp_integration.integration

The `sn_idp_integration` table is owned by the integration: every record is created and updated by the MPSSO transform's service account, and write access is not granted to any human user. The configured OIDC identity provider has the sole write access for the downstream fields it populates (existing fields on the linked `csm_consumer_user`, `csm_consumer`, and `sn_gsm_constituent_profile` records that may receive identity-provider claims). Once they have been populated at the constituent's achieved assurance level by the identity-provider integration, those fields become read-only to human users.

Fields that are not populated by the configured identity provider maintain their normal read/write behavior. In addition, fields maintain their normal read/write behavior when identity-provider verification isn't configured so constituent identities can still be verified through existing mechanisms.

Identity Assurance Levels

The `sn_idp_integration` table is shipped with a globalized IAL1–IAL3 identity assurance model, mapped from provider-specific values. After a user logs in and consents to identity verification by the configured identity provider, the strength of identity, or assurance level, rises from IAL1 to IAL2, and higher-assurance, verified field values override lower-assurance ones. Once populated and verified by the identity-provider, these fields are moved to read-only.

Urban Planning & Permitting Administration Data Model

The Urban Planning & Permitting Administration provides the data model foundation for ServiceNow developers and administrators to develop integrations with License and Permit Playbook to modernize property administration, streamline permitting workflows, and enable evidence-based urban planning decisions.

Plugins installed with Urban Planning & Permitting Administration

App / Plugin Dependencies

App	Plugin (scope) ID	Depends on
Urban Planning Core	`com.sn_up_core`	None. Foundation app.
CSM Urban Planning	`com.sn_csm_up`	Installation of `com.sn_up_core` is required for use.

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App / Plugin Dependencies (continued)

App	Plugin (scope) ID	Depends on
License & Permit	`com.sn_gsm_lic_prmt` (base personas from com.sn_gsm)	Installation of `com.sn_csm_up` is optional; License & Permit will work normally **without** Urban Planning access.

Tables installed with Urban Planning & Permitting Administration

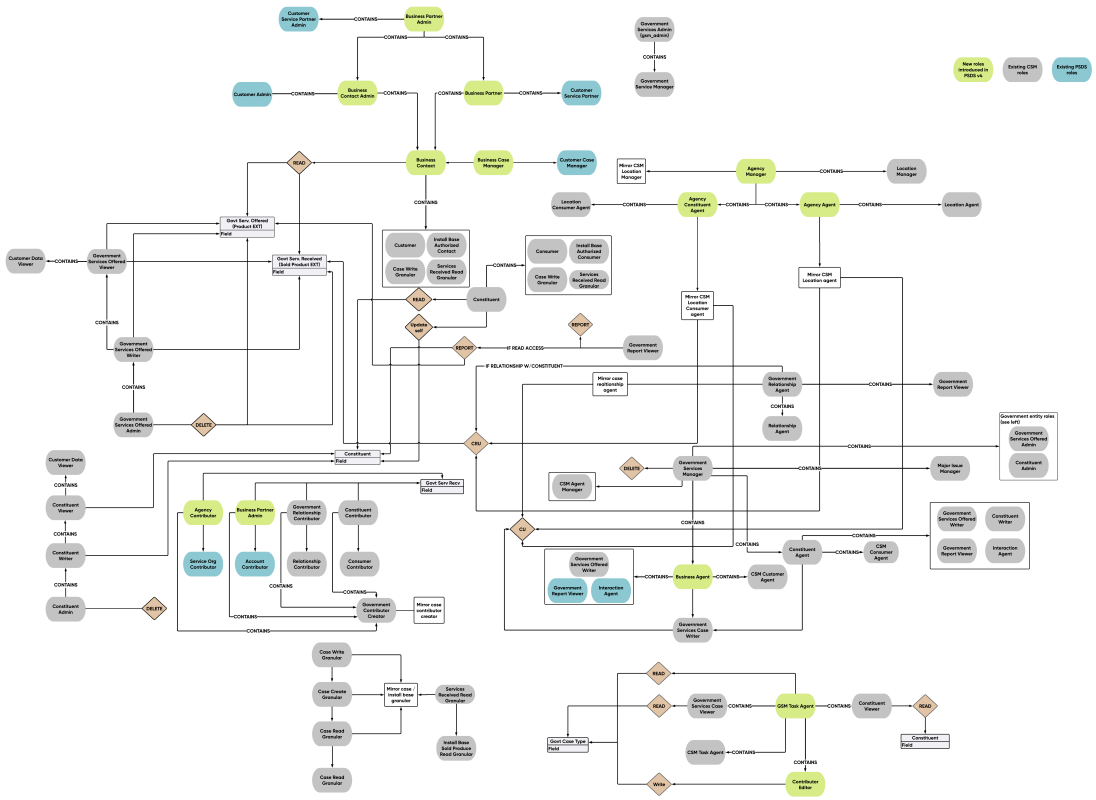
Table (exact name)	Label
sn_up_core_jurisdiction	Jurisdiction
sn_up_core_parcel	Parcel
sn_up_core_parcel_lineage	Parcel Lineage
sn_up_core_planning_area	Planning Area
sn_up_core_planning_area_parcel	Planning Area Parcel
sn_up_core_planning_regulation	Planning Regulation
sn_up_core_property_address	Property Address
sn_up_core_property_record	Property Record
sn_up_core_property_record_lineage	Property Record Lineage
sn_up_core_property_interest_base	Property Interest Base (ownership record)
sn_up_core_property_interest_document	Property Interest Document
sn_up_core_regulatory_applicability	Regulatory Applicability
sn_up_core_structure	Structure
sn_up_core_structure_parcel	Structure Parcel
sn_up_core_structure_unit	Structure Unit

Public Sector Digital Services Core Role Relationships

The following diagram shows the core role relationships within the Public Sector Digital Services application. Use this diagram to understand how each role is related to the other roles within the application.

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Core role relationships



Components and Roles installed with Public Sector Digital Services Core

Several types of components such as tables, user roles, and flows are installed when you activate the Public Sector Digital Services Core plugin.

The following plugins are activated when you enable the Public Sector Digital Services Core plugin (sn_gsm):

- UI Components for Customer Portals (com.sn_ciwf_ui_cmpnt)
- Agency Support Model (com.sn_agency_support_model)
- Customer Service Case Types (com.snc.csm_case_types)
- Customer Service Portal (com.glide.service-portal.customer-portal)
- Customer Service Install Base Management (com.snc.install_base)

Note: The Application Files table lists the components that are installed with this application. For instructions on how to access this table, see Find components installed with an application.

Demo data is available for this feature.

Note: For information about the roles installed when you activate the Public Sector Digital Services Core plugin, as well as other Public Sector Digital Services applications, see Roles installed with Public Sector Digital Services.

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Roles installed with Public Sector Digital Services

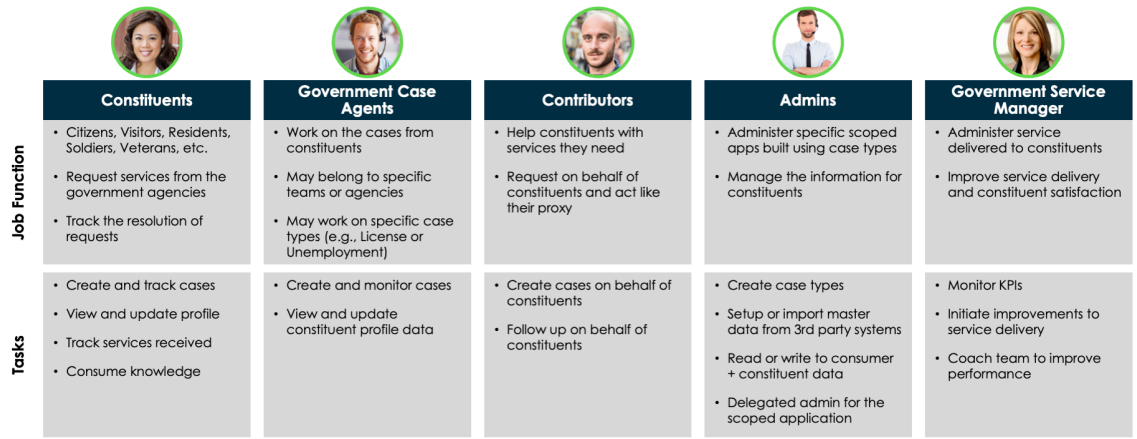
The Public Sector Digital Services application uses roles to provide access to information, identify internal and external users, and establish different types of relationships between users. These roles control access to public sector data through UI-based features such as forms and lists.

Persona-based Roles in Public Sector Digital Services

Roles and personas help you to understand the different roles involved in Public Sector Digital Services.

Public Sector Digital Services supports users with the following basic job functions (personas). Personas are defined as the individual roles that perform different tasks in Public Sector Digital Services.

The following graphic shows the most common personas used throughout Public Sector Digital Services.



Public Sector Personas

Job function	Description
Constituents	End user, such as citizens, visitors, residents, soldiers, veterans, etc. Constituents can: • Request services from government agencies. • Track resolution of requests.
Government case agents	Staff member of an agency, such as a constituent agent, business agent, agency agent, that delivers services to constituents or other agencies, and can requests services from other agencies. Agents can: • Works on government service cases for all constituents. Can read, write, and update all government service cases and profile records. • Can belong to specific teams or agencies. • Can work on specific case types (for example Licenses or Unemployment).

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Public Sector Personas (continued)

Job function	Description
Contributors	Business stakeholder or requester for constituents: • Help constituents or businesses with services that they need. • Submits requests on behalf of constituents and acts as proxy.
Admins	System administrator, who has access to all system features, functions, and data, regardless of security restraints. Admins can: • Administers specific scoped apps built using different case types. • Manages the information for constituents.
Business stakeholder	End user, such as business owner, business channel, or business partner. Business stakeholders can: • Request services from government agencies. • Track resolution of requests.
Business contact	An end user that is employed by a business. Business contacts can: • Request services from the government agencies • Register and create a login • Create and monitor cases • Track the resolution of requests and all services received
Government service agency manager	Manager or leader of an agency that provides constituent and business services. Manages agents supporting constituent services: • Administers services delivered to constituents, business stakeholders, and agency. • Can read, write, update, and delete all government service cases. • Can read, write, update, and delete all constituent, business, and agency records. • Manages staff of agency and can override agent actions. • Tracks the resolution of requests and improves service delivery and constituent satisfaction.

Core Roles

Core Constituent roles

Role title [name]	Description	Contains roles
constituent [sn_gsm.constituent]	Enables constituents to request services and	• sn_install_base.sold_product_authorized_consumer • sn_gsm.service_received_read_granular

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Core Constituent roles (continued)

Role title [name]	Description	Contains roles
	manage their information, government service cases, and services received.	• sn_customerservice.consumer • sn_gsm.case_write_granular
constituent_agent [sn_gsm.constituent_agent]	Enables agents to perform the following actions: • Read, write, and update government service cases for all constituents. • Read, write, and update constituent records.	• sn_gsm.report_viewer • sn_gsm.case_writer • sn_gsm.service_offered_writer • sn_customerservice.consumer_agent • sn_gsm.constituent_writer • interaction_agent
constituent_contributor [sn_gsm.constituent_contributor]	Enables users to request services and raise government service cases on behalf of any constituent.	• sn_customerservice.consumer_contributor • sn_gsm.contributor_creator • sn_customerservice.case_authorized_contributor
constituent_admin [sn_gsm.constituent_admin]	Provides agents with admin access and enables them to create, read, update, and delete constituent records.	sn_gsm.constituent_writer
constituent_writer [sn_gsm.constituent_writer]	Provides agents with access to create, read, and update constituent records.	sn_gsm.constituent_viewer
constituent_viewer	Provides agents with	sn_customerservice.customer_data_viewer

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Core Constituent roles (continued)

Role title [name]	Description	Contains roles
[sn_gsm.constituent_viewer]	read-only access to constituent records.	

Core Business roles

Role title [name]	Description	Contains roles
business_contact [sn_gsm.business_contact]	Enables business stakeholders to request services and manage information, government service cases, and services received.	• sn_customerservice.customer • sn_install_base.sold_product_authorized_consumer • sn_gsm.service_received_read_granular • sn_gsm.case_write_granular
business_contact_admin [sn_gsm.business_contact_admin]	Provides a business stakeholder with admin access to a business account. This role has access to all the data within the business account.	• sn_customerservice.customer_admin • sn_gsm.business_contact
business_case_manager [sn_gsm.business_case_manager]	Enables a business stakeholder to manage government service cases for a business account and associated child accounts. This role can perform the following actions:	• sn_customerservice.customer_case_manager • sn_gsm.business_contact

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Core Business roles (continued)

Role title [name]	Description	Contains roles
	• Create a case on behalf of another business contact. • View a list of cases belonging to the business. • Edit cases belonging to the business.	
business_contributor [sn_gsm.business_contributor]	Enables business stakeholders to request services and raise government service cases on behalf of any business.	• sn_customerservice.relationship_contributor • sn_gsm.contributor_creator • sn_customerservice.case_authorized_contributor
business_partner [sn_gsm.business_partner]	Enables business partners to create, view, and edit government service cases from their own account or from a business account that they are associated with.	• sn_customerservice.partner • sn_gsm.business_contact
business_partner_admin [sn_gsm.business_partner_admin]	Provides a business stakeholder with admin access to a partner account. This user can access all the	• sn_customerservice.partner_admin • sn_gsm.business_partner • sn_gsm.business_contact • sn_gsm.business_contact_admin

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Core Business roles (continued)

Role title [name]	Description	Contains roles
	data within the partner account and the government service cases created by the partners.	
business_agent [sn_gsm.business_agent]	Enables agents to perform the following actions: • Read, write, and update government service cases for all business accounts. • Read, write, and update business records.	• sn_gsm.report_viewer • sn_gsm.case_writer • sn_gsm.service_offered_writer • sn_customerservice.consumer_agent • sn_gsm.business_writer • interaction_agent

Core Agency agent roles

Role title [name]	Description	Contains roles
agency_agent [sn_gsm.agency_agent]	Enables agency agents to create and fulfill government service cases for the businesses and business contacts associated with the agency.	sn_customerservice.svc_location_ag
agency_constituent_agent [sn_gsm.agency_constituent_agent]	Enables agency agents to create and fulfill government service cases for constituents and households associated with the agency.	sn_customerservice.svc_location_co
agency_contributor [sn_gsm.agency_contributor]	Enables agency agents to request services and raise government service cases on behalf of the agency.	• sn_customerservice.service_organi • sn_gsm.contributor_creator • sn_customerservice.case_authorize

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Core Agency agent roles (continued)

Role title [name]	Description	Contains roles
agency_manager [sn_gsm.agency_manager]	Enables an agency manager to perform the following actions: • Create and update government service cases for constituents, households, business, and business contacts. • Manage data for constituents and households associated with the agencies within the agency hierarchy. • Manage data for businesses and business contacts associated with the agencies within the agency hierarchy.	• sn_customerservice.svc_location_r • sn_gsm.agency_agent • sn_gsm.agency_constituent_agent
agency_manager_contributor [sn_gsm.agency_manager_contributor]	Enables users to create, update, view, and approve cases. Allows them to register and remove staff across all agencies they manage.	• "sn_gsm.business_contributor • sn_gsm.government_agency_contr • sn_gsm.constituent_contributor • sn_gsm.government_agency_contr • sn_gsm.agency_manager_core • sn_customerservice.svc_location_r
relationship_manager [sn_gsm.agency_relationship_manager]	Enables users to view cases across all the external agencies where they have location_relationship_manager responsibility.	• sn_bus_loc.location_relationship_r • sn_gsm.agency_manager_contribu
service_manager [sn_gsm.service_manager]	Enables a service manager to perform the following actions: • Manage all work performed by agents working on government service cases. • Read, write, update, and delete all government service cases. • Read, write, update, and delete all constituent, business, and agency records.	• sn_gsm.service_offered_admin • sn_gsm.service_offered_writer • sn_gsm.constituent_agent • sn_gsm.constituent_admin • sn_gsm.business_agent

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Core Admin and other roles

Role title [name]	Description	Contains roles
admin [sn_gsm.admin]	Provides a user with delegated admin access to scoped applications created on the Public Sector Digital Services platform.	sn_gsm.service_manager
service_offered_admin [sn_gsm.service_offered_admin]	Provides users with admin access and enables them to create, read, update, and delete services-offered records and services-received records.	sn_gsm.service_offered_writer
service_offered_admin [sn_gsm.service_offered_admin]		None
service_offered_writer [sn_gsm.service_offered_writer]	Provides users with access to create, read, and update services-offered records and services-received records.	sn_gsm.service_offered_viewer
service_offered_viewer [sn_gsm.service_offered_viewer]	Provides users with read-only access to services offered records and services-	sn_customerservice.customer_data_viewer

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Core Admin and other roles (continued)

Role title [name]	Description	Contains roles
	received records.	
case_writer [sn_gsm.case_writer]	Provides agents with access to create, read, and update government service cases.	sn_gsm.case_viewer
case_viewer [sn_gsm.case_viewer]	Provides agents with read-only access to government service cases.	None
contributor_creator [sn_gsm.contributor_creator]	Enables agents or business stakeholders to create government service cases and is included in the top-level contributor roles. This role can create cases but cannot view other cases.	None
relationship_agent [sn_gsm.relationship_agent]	Enables agents to work on government service cases for customers that they have relationship with.	• sn_gsm.report_viewer • sn_customerservice.relationship_agent

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Core Admin and other roles (continued)

Role title [name]	Description	Contains roles
relationship_contributor [sn_gsm.relationship_contributor]	Enables business stakeholders to raise government service cases on behalf of customers that they have relationship with.	• sn_customerservice.relationship_contributor • sn_gsm.contributor_creator • sn_customerservice.case_authorized_contributor

Roles by Application

Note: Service Request Playbook does not contain roles that are separate from Public Sector Digital Services Core.

Urban Planning & Permitting Administration roles

Role title [name]	Contains roles
admin [admin]	• sn_up_core.admin • sn_up_core.urban_planning_agent • sn_up_core.urban_planning_agent • sn_up_core.urban_planning_writer • sn_up_core.urban_planning_reader
core_admin [sn_up_core.admin]	• sn_up_core.urban_planning_agent • sn_up_core.urban_planning_agent • sn_up_core.urban_planning_writer • sn_up_core.urban_planning_reader
agent [sn_up_core.urban_planning_agent]	sn_up_core.urban_planning_writer
writer [sn_up_core.urban_planning_writer]	sn_up_core.urban_planning_reader
reader [sn_up_core.urban_planning_reader]	
interest_holder	sn_up_core.urban_planning_reader

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Urban Planning & Permitting Administration roles (continued)

Role title [name]	Contains roles
[sn_up_core.property_interest_holder]	
csm_admin [sn_csm_up.admin]	• sn_csm_up.agent • sn_up_core.admin • sn_up_core.urban_planning_agent • sn_up_core.admin
csm_agent [sn_csm_up.agent]	sn_up_core.urban_planning_agent
csm_consumer [sn_csm_up.consumer]	sn_up_core.urban_planning_reader
csm_customer [sn_csm_up.customer]	sn_up_core.urban_planning_reader
csm_agency_agent [sn_csm_up.agency_agent]	sn_up_core.urban_planning_reader
lic_prmt.admin [sn_gsm_lic_prmt.admin]	• sn_csm_up.admin • sn_up_core.admin
constituent_agent [sn_gsm_lic_prmt.constituent_agent]	• sn_csm_up.agent • sn_up_core.urban_planning_agent
business_agent [sn_gsm_lic_prmt.business_agent]	• sn_csm_up.agent • sn_up_core.urban_planning_agent
agency_agent [sn_gsm_lic_prmt.agency_agent]	• sn_csm_up.agent • sn_up_core.urban_planning_agent
constituent [sn_gsm.constituent]	• sn_csm_up.consumer • sn_up_core.urban_planning_reader
business_contact [sn_gsm.business_contact]	• sn_csm_up.customer • sn_up_core.urban_planning_reader

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Urban Planning & Permitting Administration roles (continued)

Role title [name]	Contains roles
government_agency_contributor [sn_gsm.government_agency_contributor]	• sn_csm_up.agency_agent • sn_up_core.urban_planning_reader

Investigative Case Management roles

Role title [name]	Description	Contains roles
icm.investigator [sn_gsm_icm.investigator]	Provides users the ability to create and work on the investigative cases. It includes read access to all the cases and write access to the cases which are assigned to the investigator.	• sn_gsm_icm.case_writer • sn_gsm_icm.case_viewer • sn_gsm_icm.entity_viewer • sn_gsm_icm.entity_writer • sn_gsm_icm.report_viewer • sn_gsm.government_service_manager • sn_gsm_icm.investigative_contributor
supervisory_agent [sn_gsm_icm.supervisory_agent]	Provides users the ability to create and work on investigative cases. It includes read access to all the cases and write access to the cases belonging to the user's assignment group.	• sn_gsm_icm.investigator • sn_gsm_icm.case_admin
special_agent [sn_gsm_icm.special_agent]	Provides users the ability to create and fulfill all cases.	• sn_gsm_icm.investigator • sn_gsm_icm.case_admin
expert_analyst [sn_gsm_icm.expert_analyst]	Provides read or write access to the cases where	• sn_gsm_icm.case_viewer • sn_gsm_icm.case_writer

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Investigative Case Management roles (continued)

Role title [name]	Description	Contains roles
	these users are team members of the case or assigned to a case task of the case.	• sn_gsm_icm.event_viewer • sn_gsm_icm.entity_writer • sn_gsm_icm.event_viewer
investigative_contributor [sn_gsm_icm.investigative_contributor]	Provides read or write access to the cases where these users are team members of the case or assigned to a case task of the case.	• sn_gsm_icm.case_viewer • sn_gsm_icm.case_writer • sn_gsm_icm.event_viewer • sn_gsm_icm.entity_viewer
case_viewer sn_gsm_icm.case_viewer	Provides users read only access to Investigative Case records.	sn_gsm.case_viewer
entity_viewer sn_gsm_icm.entity_viewer	Provides read access to all the investigative case management entities such as Person, Organization, Property, Vehicle, or Evidence.	None
event_viewer sn_gsm_icm.event_viewer	Provides read access to all the investigative case management events.	None
report_viewer sn_gsm_icm.report_viewer	Provides users access to view reports containing Information Request data.	sn_gsm.report_viewer

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Investigative Case Management roles (continued)

Role title [name]	Description	Contains roles
case_admin [sn_gsm_icm.case_admin]	Provides read and write access to all the investigative cases.	• sn_gsm_icm.case_writer • sn_gsm_icm.case_viewer • sn_gsm_icm.event_writer • sn_gsm_icm.entity_writer • sn_gsm_icm.report_viewer
icm.admin [sn_gsm_icm.admin]	Provides delegated admin access to the investigative case management application.	• sn_gsm_icm.supervisory_agent • sn_gsm_icm.special_agent
case_task_agent [sn_gsm_icm.case_task_agent]	Provides read access for administrative purposes to cases where users are assigned to a case task of the case.	sn_gsm.case_task_agent
case_writer sn_gsm_icm.case_writer	Provides users write only access to investigative case records that are assigned to the users or where the users are team members or where the case task of the case is assigned to the user.	• sn_gsm.case_writer • sn_gsm_icm.case_viewer
entity_writer sn_gsm_icm.entity_writer	Provides write access to all the investigative case management	sn_gsm_icm.entity_viewer

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Investigative Case Management roles (continued)

Role title [name]	Description	Contains roles
	entities like Person, Organization, Property, Vehicle or Evidence.	
event_writer sn_gsm_icm.event_writer	Provides write access to all the events which the user has access to.	sn_gsm_icm.event_viewer

Grants Management roles

Role title [name]	Description	Contains roles
grant_admin sn_gsm_grnt_mgmt.grant_admin	Provides users with admin access and enables them to create, read, update, and edit grant proposals in the grant setup and proposals playbooks.	• sn_gsm.admin • sn_svc_appl_pgm_mg.grant_program_director
grant_program_director sn_gsm_grnt_mgmt.grant_director	Provides users with the grant program director role, which consists of the grant program manager and the government service manager roles.	• sn_gsm_grnt_mgmt.program_manager • sn_gsm.government_service_manager
external_reviewer [sn_gsm_grnt_mgmt.external_reviewer]	Enables merit review users to review and	• sn_svc_appl_pgm_mg.resource_role_viewer • sn_svc_appl_pgm_mg.milestone_viewer • sn_svc_appl_pgm_mg.resource_mapping_viewer

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Grants Management roles (continued)

Role title [name]	Description	Contains roles
	score grant proposals from within the Reviewer Service Portal.	• sn_svc_appl_pgm_mg.scoring_framework_attribute_v • sn_svc_appl_pgm_mg.business_calendar_entry_view • sn_svc_appl_pgm_mg.resource_assignment_viewer • sn_svc_appl_pgm_mg.scoring_framework_viewer • sn_svc_appl_pgm_mg.planning_item_viewer
grant_case_writer sn_gsm_grnt_mgmt.case_writer	Provides users with access to create, read, and update grant management case records.	• sn_gsm_grnt_mgmt.case_viewer • sn_gsm.case_writer • contract_manager
grant_case_viewer sn_gsm_grnt_mgmt.case_viewer	Provides users with read-only access to grant management case records.	• sn_gsm.case_viewer • decision_table_reader • sn_gsm_grnt_mgmt.case_writer
grant_management_report_viewer sn_gsm_grnt_mgmt.report_viewer	Enables users to view reports about the grants management playbooks.	None

License and Permit Playbook roles

Role title [name]	Description	Contains roles
License & Permits Install base writer [sn_gsm_lic_prmt.ib_writer]	Provides create, read, and write access to Install base items.	sn_gsm_lic_prmt.ib_writer
License & Permit Constituent Agent [sn_gsm_lic_prmt.constituent_agent]	Enables users to work on License & Permit cases for all constituents. It includes the ability to read/write/update all License & Permit cases and constituent records	• sn_gsm.constituent_agen • sn_gsm_lic_prmt.case_wr • sn_gsm_lic_prmt.report_v

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License and Permit Playbook roles (continued)

Role title [name]	Description	Contains roles
		• sn_gsm_lic_prmt.ib_viewe • sn_gsm_lic_prmt.manage
License & Permit Agency Manager [sn_gsm_lic_prmt.agency_manager]	Enables users to manage data for agencies in the manager's agency hierarchy.	• sn_gsm.agency_manager • sn_gsm_lic_prmt.agency_ • sn_gsm_lic_prmt.agency_
License & Permit Agency Constituent Agent [sn_gsm_lic_prmt.agency_constituent_agent]	Enables users to manage data for agencies in the constituent agent's agency hierarchy.	• sn_gsm.agency_constitue • contract_manager • decision_table_reader • sn_gsm_lic_prmt.agency_
License & Permit Agency Manager Contributor [sn_gsm_lic_prmt.agency_manager_contributor]	Enables users to create, update, view, and approve cases. They can also register and remove staff across all agencies they manage.	• sn_gsm_lic_prmt.business • sn_gsm_lic_prmt.agency_ • sn_gsm_lic_prmt.constitu • sn_gsm_lic_prmt.agency_ • sn_gsm_lic_prmt.agency_ • sn_gsm.agency_manager
License & Permits Agency Manager Core [sn_gsm_lic_prmt.agency_manager_core]	Granular role to manage agency staff registrations and staff relationships with businesses, constituents, and households for all the agencies within the hierarchy.	• sn_gsm.agency_manager • contract_manager
License & Permit Agency Relationship Manager [sn_gsm_lic_prmt.agency_relationship_manager]	Enables users to view cases across all the external agencies where they have location_relationship_manager responsibility.	• sn_gsm.agency_relationsl • sn_gsm_lic_prmt.agency_
License & Permit Case Task Agent [sn_gsm_lic_prmt.case_task_agent]	Provides users the ability to create and fulfill License & Permit cases for the constituents and households in the agent's agency.	• sn_gsm_lic_prmt.contribu • sn_gsm_lic_prmt.case_vie • sn_gsm.case_task_agent

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License and Permit Playbook roles (continued)

Role title [name]	Description	Contains roles
License & Permit Case Viewer [sn_gsm_lic_prmt.case_viewer]	This role provides users read only access to License & Permit case records.	• sn_gsm.case_viewer • decision_table_reader • sn_gsm_lic_prmt.case_wr • sn_gsm_lic_prmt.case_tas
License & Permit Agency Business Agent [sn_gsm_lic_prmt.agency_agent]	Enables users to create and fulfill License & Permit cases for the accounts and contacts in the agent's agency.	• sn_gsm.agency_agent • contract_manager • decision_table_reader • sn_gsm_lic_prmt.agency_
License & Permit Business Agent [sn_gsm_lic_prmt.business_agent]	Provides users the ability to work on license and permit cases for business. It includes the ability to read, write, or update all license and permit cases and business records.	• sn_gsm_lic_prmt.report_v • sn_gsm_lic_prmt.case_wr • sn_gsm.business_agent • sn_gsm_lic_prmt.ib_viewe • sn_gsm_lic_prmt.manage
License & Permits Install base admin [sn_gsm_lic_prmt.ib_admin]	This role provides create,read,write, and delete access to Install base items.	• sn_gsm_lic_prmt.ib_writer • sn_gsm_lic_prmt.manage
License & Permits Case Writer [sn_gsm_lic_prmt.case_writer]	This role provides users access to create, read and update License & Permits case records.	• sn_gsm_lic_prmt.case_vie • sn_gsm.case_writer • contract_manager • sn_gsm_lic_prmt.business • sn_gsm_lic_prmt.constitu
License & Permits Agency Manager Core [sn_gsm_lic_prmt.agency_manager_core]	Granular role to manage agency staff registrations and staff relationships with businesses, constituents,	• sn_gsm.agency_manager • contract_manager

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License and Permit Playbook roles (continued)

Role title [name]	Description	Contains roles
	and households for all the agencies within the hierarchy.	• sn_gsm_lic_prmt.agency_ • sn_gsm_lic_prmt.agency_
License & Permits Contributor Creator [sn_gsm_lic_prmt.contributor_creator]	Enables users to create license and permit cases and is included in the top-level contributor roles. It only allows record creation but does not allow visibility to a record on its own.	• sn_gsm.contributor_creato • sn_gsm_lic_prmt.agency_ • sn_gsm_lic_prmt.business • sn_gsm_lic_prmt.constitu • sn_gsm_lic_prmt.relations
License & Permit Constituent contributor [sn_gsm_lic_prmt.constituent_contributor]	This role enables users to request for service and raise License & Permit cases on behalf of any constituent. This allow business stakeholders to act as a requestor on of behalf of customers.	• sn_gsm.constituent_contr • sn_gsm_lic_prmt.contribu • sn_gsm_lic_prmt.agency_
License & Permit Business Contributor [sn_gsm_lic_prmt.business_contributor]	This role enables users to request for service and raise License & Permit cases on behalf of any business. This allow business stakeholders to act as a requester on of behalf of customers.	• sn_gsm.business_contribu • sn_gsm_lic_prmt.contribu • sn_gsm_lic_prmt.agency_
License & Permit Relationship Contributor [sn_gsm_lic_prmt.relationship_contributor]	Enables users to raise License & Permit cases on behalf of customers with whom they have relationships. This allows business stakeholder access to act as a requester on behalf of customers.	• sn_gsm.relationship_cont • n_gsm_lic_prmt.contributo
License & Permit Contributor Editor [sn_gsm_lic_prmt.contributor_editor]	Grants restrictive write access to the fields on the License and Permit Case form.	• sn_gsm.contributor_creato • sn_gsm_lic_prmt.case_tas
License & Permit Agency Contributor [sn_gsm_lic_prmt.agency_contributor]	Enables users to request service and raise License & Permit cases for their service organization (business location). This role is agnostic to internal and external.	• sn_gsm.agency_contributo • sn_gsm_lic_prmt.contribu • sn_gsm_lic_prmt.agency_

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Social Benefits Playbook roles

Role title [name]	Description	Contains roles
Social Benefits Case Viewer [sn_gsm_soc_bnfts.case_viewer]	This role provides users read only access to Social Benefits Case records.	• sn_gsm.case_viewer • decision_table_reader
Social Benefits Case Writer [sn_gsm_soc_bnfts.case_writer]	This role provides users access to create, read and update Social Benefits Case records.	• sn_gsm_soc_bnfts.case_viewer • sn_gsm.case_writer • contract_manager
Social Benefits install base admin [sn_gsm_soc_bnfts.ib_admin]	This role provides create,read,write, and delete access to Install base items.	sn_gsm_soc_bnfts.ib_writer
Social Benefits install base read granular [sn_gsm_soc_bnfts.ib_read_granular]	Provides granular read access to issued Social Benefits.	sn_install_base.install_base_read_granu
Social Benefits install base viewer [sn_gsm_soc_bnfts.ib_viewer]	Provides read access to Install base items.	None
Social Benefits install base writer [sn_gsm_soc_bnfts.ib_writer]	Provides create, read and write access to Install base items.	sn_gsm_soc_bnfts.ib_viewer
Social Benefits Constituent Contributor [sn_gsm_soc_bnfts.constituent_contributor]	This role enables users to request service and raise Social Benefits cases on behalf of any constituent. This allows business stakeholders to act as a requestor on behalf of customers.	• sn_gsm.constituent_contributor • sn_gsm_soc_bnfts.contributor_creator
Social Benefits Contributor Creator [sn_gsm_soc_bnfts.contributor_creator]	Enables users to create Social Benefits cases and is included in the top-level contributor roles.	• sn_gsm.constituent_contributor • sn_gsm_soc_bnfts.contributor_creator

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Social Benefits Playbook roles (continued)

Role title [name]	Description	Contains roles
	It only allows record creation but does not allow visibility to a record on its own.	
Social Benefits Contributor Editor [sn_gsm_soc_bnfts.contributor_editor]	Grants restrictive write access to the fields on the Social Benefits Case form.	sn_gsm.contributor_creator
Social Benefits Relationship Contributor [sn_gsm_soc_bnfts.relationship_contributor]	Enables users to raise Social Benefits cases on behalf of customers with whom they have relationships. This allows business stakeholder access to act as a requester on behalf of customers.	• sn_gsm.relationship_contributor • sn_gsm_soc_bnfts.contributor_creator
social_benefits_agency_agent [sn_gsm_soc_bnfts.agency_agent]	Provides users the ability to create and fulfill cases for the accounts and contacts in the agent's agency.	• sn_gsm.agency_agent • decision_table_reader • contract_manager
social_benefits_agency_constituent_agent [sn_gsm_soc_bnfts.agency_constituent_agent]	Provides users the ability to create and fulfill cases for the constituents and households in the agent's agency.	• decision_table_reader • sn_gsm.agency_constituent_agent • contract_manager
social_benefits_agency_contributor [sn_gsm_soc_bnfts.agency_contributor]	Enables users to request service and raise Social Benefits cases for their agency(business location). This role is agnostic to internal and external.	• sn_gsm.government_agency_contribu • sn_gsm_soc_bnfts.contributor_creator

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Social Benefits Playbook roles (continued)

Role title [name]	Description	Contains roles
social_benefits_agency_manager [sn_gsm_soc_bnfts.agency_manager]	Provides users the ability to manage data for agencies in the manager's agency hierarchy.	• sn_gsm_soc_bnfts.agency_agent • sn_gsm_soc_bnfts.agency_manager_ • sn_gsm.agency_manager • sn_gsm_soc_bnfts.agency_constituen
social_benefits_agency_manager_contributor [sn_gsm_soc_bnfts.agency_manager_contributor]	Manage agencies and create a case for a business, household, or constituent at the agency or any child agency.	• sn_gsm_soc_bnfts.agency_contributo • sn_gsm_soc_bnfts.business_contribu • sn_gsm_soc_bnfts.agency_manager_ • sn_gsm_soc_bnfts.constituent_contri • sn_gsm.agency_manager_contributor
social_benefits_agency_manager_core [sn_gsm_soc_bnfts.agency_manager_core]	Granular role to manage agency staff registrations and staff relationships with businesses, constituents, and households for all the agencies within the hierarchy.	• sn_gsm.agency_manager_core • contract_manager
social_benefits_agency_relationship_manager [sn_gsm_soc_bnfts.agency_relationship_manager]	Manages and monitors all the activities performed by the agencies. It also acts as an internal point of contact for the agencies.	• sn_gsm_soc_bnfts.agency_manager_ • sn_gsm.agency_relationship_manage
social_benefits_business_agent [sn_gsm_soc_bnfts.business_agent]	Provides users the ability to work on Social Benefits cases for business. It includes the ability to read/write/update all Social Benefits cases and business records.	• sn_gsm_soc_bnfts.case_writer • sn_gsm_soc_bnfts.report_viewer • sn_gsm.business_agent • sn_gsm_soc_bnfts.ib_viewer

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Social Benefits Playbook roles (continued)

Role title [name]	Description	Contains roles
Social Benefits Case Task Agent [sn_gsm_soc_bnfts.case_task_agent]	Enables users to work on Social Benefits case tasks.	• sn_gsm_soc_bnfts.case_viewer • sn_gsm_soc_bnfts.contributor_editor • sn_gsm.case_task_agent
Social Benefits Constituent Agent [sn_gsm_soc_bnfts.constituent_agent]	Provides users the ability to work on Social Benefits cases for all constituents. It includes the ability to read/write/update all cases and constituent records	• sn_gsm_soc_bnfts.case_writer • sn_gsm_soc_bnfts.report_viewer • sn_gsm.constituent_agent • sn_gsm_soc_bnfts.ib_viewer
Social Benefits Manager [sn_gsm_soc_bnfts.manager]	Provides users the ability to manage all work performed by agents working on Social Benefits cases (constituent and business). Users with this role have the ability to read/write/update/delete all Social Benefits cases and constituent/business records.	• sn_gsm_soc_bnfts.ib_admin • sn_gsm_soc_bnfts.business_agent • sn_gsm.government_service_manage • sn_gsm_soc_bnfts.constituent_agent • sn_majorissue_mgt.major_issue_mana
Social Benefits Relationship Agent [sn_gsm_soc_bnfts.relationship_agent]	Enables users to work on Social Benefits cases only for customers with whom they have relationships.	• sn_gsm_soc_bnfts.report_viewer • decision_table_reader • sn_gsm.relationship_agent • contract_manager

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Information Request Administration roles

Role title [name]	Description	Contains roles
Admin sn_gsm_info_req.admin	Provides delegated admin access to scoped applications created on the Information Request Playbook platform.	• sn_gsm_info_req.manager • sn_gsm.admin
Agency Agent sn_gsm_info_req.agency_agent	Provides users the ability to create and fulfill cases for the accounts and contacts in the agent's agency.	sn_gsm.agency_agent
Agency Constituent Agent sn_gsm_info_req.agency_constituent_agent	Provides users the ability to create and fulfill cases for the constituents and households in the agent's agency.	sn_gsm.agency_constituent_agent
Agency Contributor sn_gsm_info_req.agency_contributor	Enables users to request service and raise Information Request cases for their service organization (business location).	• sn_gsm_info_req.contributor_creator • sn_gsm.government_agency_contributor
Agency Manager sn_gsm_info_req.agency_manager	Provides users the ability to manage data for agencies	• sn_gsm_info_req.agency_constituent_agent • sn_gsm.agency_manager • sn_gsm_info_req.agency_agent

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Information Request Administration roles (continued)

Role title [name]	Description	Contains roles
	in the manager's agency hierarchy.	
Business Agent sn_gsm_info_req.business_agent	Provides users the ability to work on Information Request cases for business. It includes the ability to read, write, and update all Information Request cases and business records.	• sn_gsm.business_agent • sn_gsm_info_req.case_writer • sn_gsm_info_req.report_viewer
Business Contributor sn_gsm_info_req.business_contributor	Enables users to request for service and raise Information Request cases on behalf of any business. This allow business stakeholders to act as a requester on of behalf of customers.	• sn_gsm_info_req.contributor_creator • sn_gsm.business_contributor
Case Task Agent sn_gsm_info_req.case_task_agent	Enables users to work on Information Request case tasks.	• sn_gsm_info_req.case_viewer • sn_gsm.case_task_agent • sn_gsm_info_req.contributor_editor
Case Viewer sn_gsm_info_req.case_viewer	Provides users read only access to Information	sn_gsm.case_viewer

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Information Request Administration roles (continued)

Role title [name]	Description	Contains roles
	Request Case records.	
Case Writer sn_gsm_info_req.case_writer	Provides users access to create read and update Information Request Case records.	• sn_gsm.case_writer • sn_gsm_info_req.case_viewer
Constituent Agent sn_gsm_info_req.constituent_agent	Provides users the ability to work on Information Request cases for all constituents. It includes the ability to read, write, and update all Information Request cases and constituent records.	• sn_gsm_info_req.case_writer • sn_gsm_info_req.report_viewer • sn_gsm.constituent_agent
Constituent Contributor sn_gsm_info_req.constituent_contributor	Enables users to request for service and raise Information Request cases on behalf of any constituent. This allows business stakeholders to act as a requestor on behalf of customers.	• sn_gsm_info_req.contributor_creator • sn_gsm.constituent_contributor
Contributor Creator sn_gsm_info_req.contributor_creator	Enables users to create	sn_gsm.contributor_creator

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Information Request Administration roles (continued)

Role title [name]	Description	Contains roles
	Information Request cases and is included in the top-level contributor roles. It only allows record creation but does not allow visibility to a record on its own.	
Contributor Editor sn_gsm_info_req.contributor_editor	Grants restrictive write access to the fields on the Information Request Case form.	sn_gsm.contributor_editor
Request Manager sn_gsm_info_req.manager	Provides users the ability to manage all work performed by agents working on Information Request cases (constituent and business). Users with this role have the ability to read, write, update, and delete all Information Request service cases and constituent or business records.	• sn_majorissue_mgt.major_issue_manager • sn_gsm_info_req.business_agent • sn_gsm.government_service_manager • sn_gsm_info_req.constituent_agent

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Information Request Administration roles (continued)

Role title [name]	Description	Contains roles
Relationship Agent sn_gsm_info_req.relationship_agent	Enables users to work on Information Request cases only for customers with whom they have relationships.	• sn_gsm.relationship_agent • sn_gsm_info_req.report_viewer
Relationship Contributor sn_gsm_info_req.relationship_contributor	Enables users to raise Information Request cases on behalf of customers with whom they have relationships. This allows business stakeholder access to act as a requester on behalf of customers.	• sn_gsm.relationship_contributor • sn_gsm_info_req.contributor_creator
Report Viewer sn_gsm_info_req.report_viewer	Provides users access to view reports containing Information Request data.	sn_gsm.report_viewer

Service Applicant Program Management roles

Role title [name]	Description	Contains roles
Program Admin (sn_svc_appl_pgm_mg.admin)	Provides delegated admin access to scoped applications created on the Service Applicant	None

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Service Applicant Program Management roles (continued)

Role title [name]	Description	Contains roles
	Program Management platform	
Grant Program Admin (sn_svc_appl_pgm_mg.grant_program_admin)	Provides access to all Grant Programs.	sn_svc_appl_pgm_mg.grant_progr
Grant Program Director (sn_svc_appl_pgm_mg.grant_program_director)	Provides access to all Grant Programs.	• sn_gsm.government_service_ma • sn_svc_appl_pgm_mg.grant_pro
Grant Program Writer (sn_svc_appl_pgm_mg.grant_program_manager)	Creates or updates Grant Programs if they are a part of.	• sn_gsm.business_agent • sn_svc_appl_pgm_mg.grant_pro • sn_smart_asmt.assessment_adr • sn_svc_appl_pgm_mg.planning_ • sn_svc_appl_pgm_mg.resource_ • sn_svc_appl_pgm_mg.scoring_f • sn_svc_appl_pgm_mg.resource_ • sn_svc_appl_pgm_mg.milestone • sn_svc_appl_pgm_mg.resource_ • sn_gsm.goal_viewer • sn_svc_appl_pgm_mg.business_ • sn_svc_appl_pgm_mg.pace_rea • sn_pace.mapping_admin • sn_svc_appl_pgm_mg.scoring_f
Grant Program Viewer (sn_svc_appl_pgm_mg.grant_program_writer)	Provides write access to Grant Program records.	• sn_svc_appl_pgm_mg.grant_pro • sn_svc_appl_pgm_mg.planning_
Planning Item Writer (sn_svc_appl_pgm_mg.grant_program_viewer)	Provides read access to Grant Program records.	sn_svc_appl_pgm_mg.planning_ite
Planning Item Viewer (sn_svc_appl_pgm_mg.planning_item_writer)	Provides write access to Planning Item records.	sn_svc_appl_pgm_mg.planning_ite
Budget Allocation Writer (sn_svc_appl_pgm_mg.planning_item_viewer)	Provides read access	None

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Service Applicant Program Management roles (continued)

Role title [name]	Description	Contains roles
	to Planning Item records.	
(sn_svc_appl_pgm_mg.budget_allocation_writer)	Provides write access to Budget Allocation records.	sn_svc_appl_pgm_mg.budget_allo
(sn_svc_appl_pgm_mg.budget_allocation_viewer)	Provides read access to Budget Allocation records.	None
(sn_svc_appl_pgm_mg.milestone_writer)	Provides write access to Milestone records.	sn_svc_appl_pgm_mg.milestone_v
(sn_svc_appl_pgm_mg.milestone_viewer)	Provides read access to Milestone records.	None
Resource Assignment Writer (sn_svc_appl_pgm_mg.resource_assignment_writer)	Provides write access to Resource Assignment records.	sn_svc_appl_pgm_mg.resource_as
Resource Assignment Viewer (sn_svc_appl_pgm_mg.resource_assignment_viewer)	Provides read access to Resource Assignment records.	None
Informational Resource Mapping Writer (sn_svc_appl_pgm_mg.resource_mapping_writer)	Provides write access to Informational Resource Mapping records.	sn_svc_appl_pgm_mg.resource_m
Informational Resource Mapping Viewer (sn_svc_appl_pgm_mg.resource_mapping_viewer)	Provides read access to Informational Resource Mapping records.	None
Resource Role Writer (sn_svc_appl_pgm_mg.resource_role_writer)	Provides write access	sn_svc_appl_pgm_mg.resource_ro

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Service Applicant Program Management roles (continued)

Role title [name]	Description	Contains roles
	to Resource Role records.	
Resource Role Viewer (sn_svc_appl_pgm_mg.resource_role_viewer)	Provides read access to Resource Role records.	None
Scoring Framework Writer (sn_svc_appl_pgm_mg.scoring_framework_writer)	Provides write access to Scoring Framework records.	sn_svc_appl_pgm_mg.scoring_fra
Scoring Framework Viewer (sn_svc_appl_pgm_mg.scoring_framework_viewer)	Provides read access to Scoring Framework records.	None
Scoring Framework Attribute Writer (sn_svc_appl_pgm_mg.scoring_framework_attribute_writer)	Provides write access to Scoring Framework Attributes records.	sn_svc_appl_pgm_mg.scoring_fra
Scoring Framework Attribute Viewer (sn_svc_appl_pgm_mg.scoring_framework_attribute_viewer)	Provides read access to Scoring Framework Attributes records.	None
Business Calendar Entry Viewer (sn_svc_appl_pgm_mg.business_calendar_entry_viewer)	Provides read access to Business Calendar Entry and Business Calendar Entry Name tables.	None
Pace Reader (sn_svc_appl_pgm_mg.pace_reader)	Provides read access to PaCE records.	None
Report Viewer (sn_svc_appl_pgm_mg.report_viewer)	Provides users the access to view reports of Program records.	None

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Roles by Plugin

Service Applicant Plugin roles

Role title [name]	Description	Contains roles
(sn_svc_appl_info.admin)	Provides delegated admin access to scoped applications created on the Service Application Information.	• sn_svc_appl_info.point_in_time_content • sn_svc_appl_info.applicant_admin • sn_svc_appl_info.financial_details_admi
(sn_svc_appl_info.applicant_admin)	Provides create,read,write and delete access to applicant records.	sn_svc_appl_info.applicant_writer
(sn_svc_appl_info.applicant_viewer)	Provides read access to applicant records.	
(sn_svc_appl_info.applicant_writer)	Provides create,read and write access to applicant records.	sn_svc_appl_info.applicant_viewer
(sn_svc_appl_info.financial_details_admin)	Provides create,read,write and delete access to financial details records.	sn_svc_appl_info.financial_details_writer
(sn_svc_appl_info.financial_details_viewer)	Provides read access to financial details records.	None
(sn_svc_appl_info.financial_details_writer)	Provides create,read and write access to financial details records.	sn_svc_appl_info.financial_details_viewer
(sn_svc_appl_info.point_in_time_content_admin)	Provides create,read, write and delete access to point-in-time content records.	sn_svc_appl_info.point_in_time_content_w

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Service Applicant Plugin roles (continued)

Role title [name]	Description	Contains roles
(sn_svc_appl_info.point_in_time_content_viewer)	Provides read access to point-in-time content records.	None
(sn_svc_appl_info.point_in_time_content_writer)	Provides create,read and write access to point-in-time content records.	sn_svc_appl_info.point_in_time_content_v
(sn_svc_appl_info.report_viewer)	Provides users the access to view reports on the Service Applicant Information platform.	None

Policy as Code Engine (PaCE) Roles

This is used in conjunction with the **Social Benefits Playbook**.

Role	Description	Persona
sn_pace.execution_reader	A read-only user with view-only access. This user can view policies, categories, and executions.	Policy user, internal auditor.
sn_pace.code_reader	Can review PaCE versions, policy code, and run tests.	Internal auditor
sn_pace.code_editor	This user has all the sn_pace_code_reader permissions plus the ability to create PaCE policy versions.	Policy developer
sn_pace.policy_reader	This user has all the sn_pace_code_reader permissions plus the ability to review policy details and mapping information.	Policy user, internal auditor
sn_pace.policy_editor	This user has all the sn_pace_policy_reader and sn_pace.code_editor permissions plus the ability to create policies and mappings.	Policy developer
sn_pace.mapping_admin	This user can map policies and edit config parameters for policy mappings.	Mapping admin
sn_pace.admin	This user has the permissions of all the other roles plus the ability	Policy admin

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Policy as Code Engine (PaCE) Roles
This is used in conjunction with the **Social Benefits Playbook**.

(continued)

Role	Description	Persona
	to create categories, policies, mappings, and code.	
sn_pace.super_admin	This user has all the sn_pace.admin role permissions across all calling services.	Not applicable
Maint role	Internal user who can create default content.	Not applicable

Granular roles

You can use predefined functional and granular roles installed with Public Sector Digital Services to establish relationships between users and public sector entities. These functional and granular roles provide different levels of access to public sector data.

- Functional roles: A set of roles required to perform a function or meaningful action that requires access on multiple entities.
- Granular roles: Roles that provide access to cases, services used, and related public sector entities. One or more granular roles can be bundled together as a functional role.

A granular model controls access to data through UI-based interactions by granting the appropriate level of access to the corresponding public sector entities. With this functionality, each role is associated with a set of privileges or responsibilities that determine users' access to information via forms, lists, and application features. You can have fine-grained access control by setting granular policies that authorize individuals to access the information needed to work efficiently and effectively, ultimately helping improve the constituent experience.

Note: Role-based access controls govern UI interactions. They do not restrict access by users with system-level scripting privileges or elevated platform roles. These roles control access to public sector data through UI-based features such as forms and lists.

For example, if you extend the Government Service Case table or other tables in the Public Sector Digital Services app, you must replicate the access control lists for the extended tables. You can assign granular roles to public sector users to control access to those extended tables.

Granular roles

Role title [name]	Description	Contains roles
case_create_granular [sn_gsm.case_create_granular]	Provides constituents or business stakeholders with granular create access to government service cases.	sn_gsm.case_read_granular
case_read_granular	Provides constituents	sn_customerservice.case_read_granular

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Granular roles (continued)

Role title [name]	Description	Contains roles
[sn_gsm.case_read_granular]	or business stakeholders with granular read access to government service cases.	
case_write_granular [sn_gsm.case_write_granular]	Provides constituents or business stakeholders with granular write access to government service cases.	• sn_gsm.case_create_granular • sn_gsm.case_read_granular
service_received_read_granular [sn_gsm.service_received_read_granular]	Provides constituents or business stakeholders with granular read access to services-received records.	sn_install_base.sold_product_read_granular
License & Permits Install base read granular [sn_gsm_lic_prmt.ib_read_granular]	Provides granular read access to issued License and Permits.	• sn_install_base.install_base_read_granular • sn_gsm.business_contact • sn_gsm.constituent
case_admin [sn_gsm_icm.case_admin]	Provides read and write access to all the investigative cases.	• sn_gsm_icm.case_writer • sn_gsm_icm.case_viewer • sn_gsm_icm.event_writer • sn_gsm_icm.entity_writer • sn_gsm_icm.report_viewer

Business Stakeholder Roles

Business Stakeholder for Public Sector Digital Services includes plugins and roles that provide access to business stakeholder features.

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Admins with access to Business Stakeholder can provide Business Stakeholder users with the rights to the following actions:

- Create cases on behalf of a business or an agency (service organization)
- View cases, case tasks, and business data.
- Approve requests.

Create cases on behalf of customers

Role	Description	Contains roles	Plugin	User type
Constituent contributor [sn_gsm.constituent_contributor]	Enables users to request services and raise government service cases on behalf of any constituent.	• sn_customerservice.consumer_contributor • sn_gsm.contributor_creator	com.sn_public_sector.integrated_digital_services_core	Internal and external
Business contributor [sn_gsm.business_contributor]	Enables business stakeholders to request services and raise government service cases on behalf of any business.	• sn_customerservice.relationship_contributor • sn_gsm.contributor_creator	com.sn_public_sector.integrated_digital_services_core	Internal and external
Relationship contributor [sn_gsm.relationship_contributor]	Enables business stakeholders to raise government service cases on behalf of customers with which they have a relationship.	• sn_customerservice.relationship_contributor • sn_gsm.contributor_creator	com.sn_public_sector.integrated_digital_services_core	Internal and external

Create cases on behalf of agencies

Role	Description	Contains roles	Plugin	User type
Agency contributor [sn_gsm.agency_contributor]	Enables agency agents to request services and raise government service cases on behalf of the agency.	• sn_customerservice.service_organization_contributor • sn_gsm.contributor_creator	Agency Support Model (com.snc.agency_support_model)	Internal and external
Social Benefits Business Contributor [sn_gsm_soc_bnfts.business_contributor]	Enables users to request service and raise Social Benefits cases on behalf of any business. This allows business stakeholders	• sn_gsm.business_contributor • sn_gsm_soc_bnfts.contributor_creator		

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Create cases on behalf of agencies (continued)

Role	Description	Contains roles	Plugin	User type
	to act as a requester on behalf of customers.			

View cases, case tasks, and customer data

Role	Description	Contains roles	Plugin	User type
Case viewer [sn_gsm.case_viewer]	Provides agents with read-only access to government service cases.	None	com.sn_public_sector_digital_services_core	Internal
Constituent viewer [sn_gsm.constituent_viewer]	Provides agents with read-only access to constituent records.	sn_customerservice.customer_data_viewer	com.sn_public_sector_digital_services_core	Internal
Business viewer [sn_gsm.business_viewer]		None	com.sn_public_sector_digital_services_core	Internal
Services offered viewer [sn_gsm.service_offered_viewer]	Provides users with read-only access to services offered records and services received records.	sn_customerservice.customer_data_viewer	com.sn_public_sector_digital_services_core	Internal
Government services received viewer [sn_gsm.service_received_viewer]	Provides users with read-only access to services received records.	None	com.sn_public_sector_digital_services_core	Internal

View reports and dashboards

Role	Description	Contains roles
report_viewer [sn_gsm.report_viewer]	Enables users to view reports on the Public Sector Digital Services platform.	None
grant_management_report_viewer sn_gsm_grnt_mgmt.report_viewer	Enables users to view reports about the grants management playbooks.	sn_gsm.report_viewer
License & Permit Report Viewer	Enables users to view reports on the Public Sector Digital Services platform.	sn_gsm.report_viewer

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View reports and dashboards (continued)

Role	Description	Contains roles
[sn_gsm_lic_prmt.report_viewer]		
social_benefit_report_viewer [sn_gsm_soc_bnfts.report_viewer]	Provides users access to view reports Social Benefits Playbook.	sn_gsm.report_viewer
(sn_svc_appl_info.report_viewer)	Provides users the access to view reports on the Service Applicant Information platform.	None

Note: Customers who have purchased a Public Sector Digital Services subscription can provide Business Stakeholder users with rights to actions listed under Business Stakeholder for Customer Service Management.

Properties installed with Public Sector Digital Services

Use the system properties that are added with the activation of the Public Sector Digital Services application to configure access control to application data.

These properties are available for Public Sector Digital Services.

Note: All of these properties are located in the System Properties [sys_properties] table. To access the table, enter `sys_properties.list` in the navigation filter.

Properties installed with Public Sector Digital Services

Property	Description
glide.enforce_security_scope.sn_gsm_info_req	Controls access to playbook data for the Information Request Administration feature. If this property is set to false, then ACLs from all scopes are considered when granting access to playbook data in the scope master table. This would expose information request playbook data. • Type: Boolean • Default value: true • Location: System Property [/sys_properties_list.do] table
glide.enforce_security_scope.sn_gsm	Controls how the application data from the Public Sector Digital Services application is accessed. If this property is set to false, access to the application data within the global tables of the Public Sector Digital Services app may be

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Properties installed with Public Sector Digital Services (continued)

Property	Description
	accessible based on the access control lists (ACLs) of those global tables. If this property is set to true, access to data residing in global tables are only evaluated based off the ACLs shipped directly in the Public Sector Digital Services app. Setting this property to false may lead to information disclosure from over permissive ACLs. • Type: boolean • Default value: true • Location: System Property [/sys_properties_list.do] table
glide.enforce_security_scope.sn_gsm_lic_prmt	Determines if only the access control lists (ACLs) within the License and Permit plugin will be used in determining access to the scope, or if ACLs from all scopes will be considered. If this property is set to true, the License and Permit Playbooks data is secured in scope master tables by considering only ACLs from sn_gsm_lic_prmt scope for granting access. If this property is set to false, the License and Permit Playbooks data is exposed in scope master tables by considering the ACLs from all scopes for granting access. For example, the IT Administrator can access License and Permit Playbooks data when this property is set to false. • Type: boolean • Default value: true • Location: System Property [/sys_properties_list.do] table

Plugins installed with Public Sector Digital Services Applications

These plugins are automatically installed with the following Public Sector Digital Services applications, if they aren't already active.

Note: The Application Files table lists the components that are installed with this application. For instructions on how to access this table, see Find components installed with an application.

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Plugins installed with Public Sector Digital Services Core

The following plugins are activated when you enable the Public Sector Digital Services Core (com.sn_public_sector_digital_services_core)/(sn_gsm) plugin:

Plugin	Description
UI Components for Customer Portals (com.sn_ciwf_ui_cmpnt)	Provides a library of configurable components that offer better reusability, performance, and upgrade scalability for customer service portals.
Business Location (sn_bus_loc)	Enables support for businesses that interact with customers through physical channels such as stores, branches, franchises, and dealerships. Business locations can also support other service organizations.
Agency Support Model (com.sn_agency_support_model)	Provides support for agency services to connect constituents, businesses, and agencies on a single public sector vertical platform. Supports a 360-degree view of agency activity in agent workspaces.
Customer Service Case Types (com.snc.csm_case_types)	Enables agency customers to manage complex case processes by defining new case types. A case type represents an individual business process and is a collection of diverse inputs and tasks that an agent performs to resolve constituent requests.
Customer Service Portal (com.glide.service-portal.customer-portal)	Supports business-to-business (B2B) organizations to support their customers. Provides default self-service capabilities for customers to search information or request assistance from a service agent.
Customer Service Install Base Management (com.snc.install_base)	Enables customers to capture the current state of their install base and establish the relationship to any downstream entities that might impact their functioning.
Service Applicant Information (com.sn_svc_appl_info)	Enables customers to capture additional information entered during the case creation/application process. Includes a data model and corresponding custom UIs to facilitate storing new applicant information, their associated financial information, and other constituent/business contact data.
Service Applicant Program Management (com.sn_svc_appl_pgm_mg)	The Service Applicant Program Management application, in partnership with Strategic Portfolio Management, empowers organizations to quickly design, configure, and launch applicant-facing programs, such as grants.
Service Request Criteria (sn_req_criteria)	Allows government service agents to view only relevant service definitions while creating a case. Service definitions can be filtered

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Plugin	Description
	using user criteria and entity criteria which shows only relevant service definitions for agents and constituents. Admins can create customer criteria for constituents, accounts. Constituents can see relevant service definitions in the customer portal based on customer criteria setup by admins.

Plugins installed with Investigative Case Management

The following plugins and applications are installed with the Investigative Case Management (com.sn_gsm_icm) application. The Investigative Case Management application enables government organizations to manage complex investigations with a government-optimized data model, supporting diverse investigation types and comprehensive evidence management.

Plugin	Description
Public Sector Digital Services Core (com.sn_public_sector_digital_services_core)	Provides a standard architecture for provisioning a variety of government services—such as social assistance programs, service requests, licensing/permitting, and so on—with a government data model that supports case types and agency services provided to constituents or their businesses. Includes: • UI Components for Customer Portals (com.sn_ciwf_ui_cmpnt) • Business Location (sn_bus_loc) • Agency Support Model (com.sn_agency_support_model) • Customer Service Case Types (com.snc.csm_case_types) • Customer Service Portal (com.glide.service-portal.customer-portal) • Customer Service Install Base Management (com.snc.install_base) • Service Applicant Information (com.sn_svc_appl_info) • Service Applicant Program Management (com.sn_svc_appl_pgm_mg) • Service Request Criteria (sn_req_criteria)
CSM Investigative Case Management (sn_csm_icm)	Enables organizations to handle and process complaints around various issues such as misuse, fraud or illegal activities. Extends the Customer Service case table for investigations. Purpose-built for Public Sector Digital Services. This plugin includes:

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Plugin	Description
	Investigative Case Management Foundation
Investigative Case Management Foundation (sn_icm)	AI-first platform for government fraud, waste, and abuse investigations, designed to modernize investigative operations, accelerate case resolution, and ensure regulatory compliance. Purpose-built foundation of data models, workflows, and AI agents transforms paper-based and spreadsheet-driven processes into unified digital operations. ICM provides a standard architecture for managing complex investigations with a government-optimized data model supporting diverse investigation types and comprehensive evidence management.

Plugins installed with Grants Management

The following plugins and applications are installed with the Grants Management (com.sn_gsm_grants) application. The Grants Management application enables government agencies to simplify and streamline grant program set-up, management, application intake, review, and screening using a guided, customizable experience.

Plugin	Description
Public Sector Digital Services Core (com.sn_public_sector_digital_services_core)	Provides a standard architecture for provisioning a variety of government services—such as social assistance programs, service requests, licensing/permitting, and so on—with a government data model that supports case types and agency services provided to constituents or their businesses. Includes: • UI Components for Customer Portals (com.sn_ciwf_ui_cmpnt) • Business Location (sn_bus_loc) • Agency Support Model (com.sn_agency_support_model) • Customer Service Case Types (com.snc.csm_case_types) • Customer Service Portal (com.glide.service-portal.customer-portal) • Customer Service Install Base Management (com.snc.install_base) • Service Applicant Information (com.sn_svc_appl_info)

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Plugin	Description
	• Service Applicant Program Management (com.sn_svc_appl_pgm_mg) • Service Request Criteria (sn_req_criteria)
Playbooks for Customer Service Management (com.sn_csm_playbook)	Foundational plugin that enables customers to create playbooks based on individual business needs. Playbooks guide government service agents through sequences of tasks to resolve constituent issues, and helps users to visualize the entire lifecycle of a workflow. This plugin includes: • Customer Service Portal (com.glide.service-portal.consumer-portal) • Customer Service Case Types (com.snc.csm_case_types) ○ Customer Service Case Types (com.snc.csm_case_types) ○ Customer Service Install Base Management (com.snc.install_base) ○ Agency Support Model (com.sn_agency_support_model)
Goal Framework (com.snc.goal_framework)	Captures grant program goals and deliverables. Enables strategic planning and helps define and construct strategic priorities and associate goals for the organization, in partnership with Strategic Portfolio Management.
Service Applicant Program Management (com.sn_svc_appl_pgrm_mgmt)	The Service Applicant Program Management application, in partnership with Strategic Portfolio Management, empowers organizations to quickly design, configure, and launch applicant-facing programs, such as grants. This solution provides a ready-to-use architecture and guided workflow to streamline the entire setup process. Designed with reusability in mind, this application allows teams to provision multiple applicant programs using a consistent, scalable framework. This plugin includes: • Planning Item Core (com.sn_align_core) • Planning Attributes Core (com.sn_plng_att_core) • Milestones (com.sn_milestones) • Resource Management (com.snc.resource_management)

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Plugin	Description
	• Portfolio Planning (com.sn_align_ws) • Strategic Planning (com.sn_apw_advanced)
Expanded Model and Asset Classes (com.sn_ent)	Contains all new, default, expanded model classes, asset classes, and model categories defined by ServiceNow. Installation of the Asset Management (com.snc.asset_management) plugin is a prerequisite for this application.
Document Templates (com.sn_doc)	Enables users to create HTML and PDF document templates to generate standard letters or documents,automating and simplifying the process of filling, signing, and reviewing a document online.
Document Processor (com.sn_doc_processor)	Enabling service owners to configure document categories, document types, document rules, and approval rules for document deferments and exceptions.

Plugins installed with Social Benefits Playbook

The following plugins are installed with the Social Benefits Playbook (com.sn_gsm_social_benefits) application:

Plugin	Description
Public Sector Digital Services Core (com.sn_public_sector_digital_services_core)	Provides a standard architecture for provisioning a variety of government services—such as social assistance programs, service requests, licensing/permitting, and so on—with a government data model that supports case types and agency services provided to constituents or their businesses. Includes: • Customer Service Case Types (com.snc.csm_case_types) • Customer Service Install Base Management (com.snc.install_base) • Agency Support Model (com.sn_agency_support_model) • Consumer Service Portal (com.glide.service-portal.consumer-portal) • Signature Pad (com.snc.signaturepad) • UI Components for Customer Portals (sn_ciwf_ui_cmpnt)
Playbooks for Customer Service Management (com.sn_csm_playbook)	Foundational plugin that enables customers to create playbooks based on individual business needs. Playbooks guide government

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Plugin	Description
	service agents through sequences of tasks to resolve constituent issues, and helps users to visualize the entire lifecycle of a workflow. This plugin includes: • Dynamic Related Records for Configurable Workspace (sn_uib_dyn_rel_rec) • Customer Service Management (com.sn_customerservice) • CSM Configurable Workspace Bundle
Service Applicant Information (sn_svc_appl_info)	Extends your application and case intake processes by enabling the collection of detailed applicant data. Designed to support both primary and additional applicants, the plugin provides a flexible data model and user-friendly interfaces. You can capture and manage key information—including financial details—at the point of entry.
Expanded Model and Asset Classes (com.sn_ent)	Contains all new, default, expanded model classes, asset classes, and model categories defined by ServiceNow. Installation of the Asset Management (com.snc.asset_management) plugin is a prerequisite for this application.
Document Templates (com.sn_doc)	Enables users to create HTML and PDF document templates to generate standard letters or documents,automating and simplifying the process of filling, signing, and reviewing a document online. This plugin includes: • Signature Pad (com.snc.signaturepad) • User Criteria Scoped API (com.glideapp.user_criteria.scoped.api)
Document Processor (com.sn_doc_processor)	Enabling service owners to configure document categories, document types, document rules, and approval rules for document deferments and exceptions.
Policy as Code Engine (com.sn_pace)	Contains the UI components to support the UI functionality of Policy as Code Engine (PaCE). PaCE provides a centralized platform for storing, managing, and using policies, which are pre-defined rule-sets that drive eligibility determination and benefits. Policies can be mapped to one or more social benefit types. This plugin includes the Policy as Code Engine UI (com.sn_pace_builder).

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Plugins installed with License and Permit Playbook

The following plugins are installed with the License and Permit Playbook (com.sn_gsm_lic_prmt) application:

Plugin	Description
Public Sector Digital Services Core (com.sn_public_sector_digital_services_core)	Provides a standard architecture for provisioning a variety of government services—such as social assistance programs, service requests, licensing/permitting, and so on—with a government data model that supports case types and agency services provided to constituents or their businesses. Includes: • Customer Service Case Types (com.snc.csm_case_types) • Customer Service Install Base Management (com.snc.install_base) • Agency Support Model (com.sn_agency_support_model) • Consumer Service Portal (com.glide.service-portal.consumer-portal) • Signature Pad (com.snc.signaturepad) • UI Components for Customer Portals (sn_ciwf_ui_cmpnt)
Playbooks for Customer Service Management (com.sn_csm_playbook)	Foundational plugin that enables customers to create playbooks based on individual business needs. Playbooks guide government service agents through sequences of tasks to resolve constituent issues, and helps users to visualize the entire lifecycle of a workflow. This plugin includes: • Dynamic Related Records for Configurable Workspace (sn_uib_dyn_rel_rec) • Customer Service Management (com.sn_customerservice) • CSM Configurable Workspace Bundle
Document Templates (com.sn_doc)	Enables users to create HTML and PDF document templates to generate standard letters or documents,automating and simplifying the process of filling, signing, and reviewing a document online. This plugin includes: • Signature Pad (com.snc.signaturepad) • User Criteria Scoped API (com.glideapp.user_criteria.scoped.api)

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Plugin	Description
Expanded Model and Asset Classes (com.sn_ent)	Contains all new, default, expanded model classes, asset classes, and model categories defined by ServiceNow. Installation of the Asset Management (com.snc.asset_management) plugin is a prerequisite for this application.
Service Applicant Information (sn_svc_appl_info)	Extends your application and case intake processes by enabling the collection of detailed applicant data. Designed to support both primary and additional applicants, the plugin provides a flexible data model and user-friendly interfaces. Capture and manage key information—including financial details—at the point of entry.
Document Management (com.snc.platform_document_management)	Enables you to manage large numbers of documents efficiently. Provides storage space and a filing system that allows you to easily upload, retrieve and delete documents.

Plugins installed with Information Request Administration

The following plugins are installed with Information Request Administration (com.sn_gsm_info_req) application:

Plugin	Description
Public Sector Digital Services Core (com.sn_public_sector_digital_services_core)	Provides a standard architecture for provisioning a variety of government services —such as social assistance programs, service requests, licensing/permitting, and so on— with a government data model that supports case types and agency services provided to constituents or their businesses. Includes: • Customer Service Case Types (com.snc.csm_case_types) • Customer Service Install Base Management (com.snc.install_base) • Agency Support Model (com.sn_agency_support_model) • Consumer Service Portal (com.glide.service-portal.consumer-portal) • Signature Pad (com.snc.signaturepad) • UI Components for Customer Portals (sn_ciwf_ui_cmpnt)
Playbooks for Customer Service Management (com.sn_csm_playbook)	Foundational plugin that enables customers to create playbooks based on individual business needs. Playbooks guide government service agents through sequences of tasks to

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Plugin	Description
	resolve constituent issues, and helps users to visualize the entire lifecycle of a workflow. This plugin includes: • Dynamic Related Records for Configurable Workspace (sn_uib_dyn_rel_rec) • Customer Service Management (com.sn_customerservice) • CSM Configurable Workspace Bundle
Document Management (com.snc.platform_document_management)	Enables you to manage large numbers of documents efficiently. Provides storage space and a filing system that allows you to easily upload, retrieve and delete documents.

Plugins installed with Service Request Playbook

The following plugins are installed with Service Request Playbook (com.sn_gsm_srvc_req) application:

Plugin	Description
Public Sector Digital Services Core (com.sn_public_sector_digital_services_core)	Provides a standard architecture for provisioning a variety of government services—such as social assistance programs, service requests, licensing/permitting, and so on—with a government data model that supports case types and agency services provided to constituents or their businesses. Includes: • Customer Service Case Types (com.snc.csm_case_types) • Customer Service Install Base Management (com.snc.install_base) • Agency Support Model (com.sn_agency_support_model) • Consumer Service Portal (com.glide.service-portal.consumer-portal) • Signature Pad (com.snc.signaturepad) • UI Components for Customer Portals (sn_ciwf_ui_cmpnt)
Playbooks for Customer Service Management (com.sn_csm_playbook)	Foundational plugin that enables customers to create playbooks based on individual business needs. Playbooks guide government service agents through sequences of tasks to resolve constituent issues, and helps users to visualize the entire lifecycle of a workflow. This plugin includes:

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Plugin	Description
	• Dynamic Related Records for Configurable Workspace (sn_uib_dyn_rel_rec) • Customer Service Management (com.sn_customerservice) • CSM Configurable Workspace Bundle

Plugins installed with GOV.UK Developer Toolkit

The following plugins are installed with the GOV.UK Developer Toolkit application:

Plugin	Description
Service Portal Knowledge Base (com.glide.service-portal.knowledge-base)	Provides a standard architecture for provisioning a variety of government services—such as social assistance programs, service requests, licensing/permitting, and so on—with a government data model that supports case types and agency services provided to constituents or their businesses. Includes: • Customer Service Case Types (com.snc.csm_case_types) • Customer Service Install Base Management (com.snc.install_base) • Agency Support Model (com.sn_agency_support_model) • Consumer Service Portal (com.glide.service-portal.consumer-portal) • Signature Pad (com.snc.signaturepad) • UI Components for Customer Portals (sn_ciwf_ui_cmpnt)
Playbooks for Customer Service Management (com.sn_csm_playbook)	Foundational plugin that enables customers to create playbooks based on individual business needs. Playbooks guide government service agents through sequences of tasks to resolve constituent issues, and helps users to visualize the entire lifecycle of a workflow. This plugin includes: • Dynamic Related Records for Configurable Workspace (sn_uib_dyn_rel_rec) • Customer Service Management (com.sn_customerservice) • CSM Configurable Workspace Bundle

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Plugins installed with Service Portal

The following plugins are installed with the Service Portal (com.glide.service-portal.esm) application, which comes with the GOV.UK Developer Toolkit:

Plugin	Description
Service Portal Knowledge Base (com.glide.service-portal.knowledge-base)	
Service Portal - Service Catalog [com.glide.service-portal.service-catalog]	
Service Portal - Service Status [com.glide.service-portal.service-status]	
Service Portal Configuration Pages [com.glide.service-portal.config]	
Service Portal Designer [com.glide.service-portal.designer]	
Service Portal Surveys [com.glide.service-portal.survey]	

Plugins installed with ServiceNow Otto for Public Sector Digital Services (PSDS)

The following plugins are installed with ServiceNow Otto for Public Sector Digital Services (PSDS) (com.sn_psds_gen_ai) application:

- ServiceNow Otto Platform (com.sn_genai_platform)

Optional Plugins available for Public Sector Digital Services and related apps

- Geo Map (sn_geo_map) for Service Request Playbook

Government Service Portal service catalog

The following services are base system public service catalog items offered in the Government Service Portal.

These services display automatically for registered users. When a user uses one of these catalog items to submit a request, it automatically maps the case to certain pre-built requests. .

For information on how to set up and customize the public services offered by your agency (and displayed in your Government Service Portal service catalog), see Configure the portal service catalog for a constituent, business, or agency.

A user can go to the service catalog and create a case using the categories and sub-categories outlined in the following table.

Public Service Request Catalog Items

Service Request Catalog Items

Category	Subcategory		Description
Animal	N/A	Aggressive Animal	Report truly aggressive animals as

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Service Request Catalog Items (continued)

Category	Subcategory		Description
			opposed to animals that are merely barking or running at large
		Abused and Neglected Animal	Report an injured, abused, neglected or, otherwise, in danger domestic animal.
		Injured Animal	Report any non-owned animal in the public way, public place, city park, on a pole, electrical wire, or train tracks that is injured or sick.
		Wildlife, Stray or Dead Animal Pickup	Report and request the removal of a dead wild or stray animal from the public right-of-way
Housing, Buildings, and Structures	Housing	Abandoned Vehicle (Private Property)	Report abandoned vehicles on private occupied property, private vacant property and public vacant lots/property.
		Housing Inspection, Animal	Report residential animal problems such as animal feces, too many animals and/or exotic animals on occupied private property.
		Housing Inspection, Fire Protection	Report damaged or lack of proper fire protection equipment (e.g., fire extinguisher, fire escape, smoke alarms) in residential rental property
		Housing Inspection, Vacant Residential Property	Report a residential property which has become open to casual entry by the public and represents a hazard to the community.

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Service Request Catalog Items (continued)

Category	Subcategory		Description
		Illegal Flyers	Report illegal flyers posted on private property.
Garbage, Recycling & Graffiti	Garbage	Damaged Garbage Bin Replacement	Submit a request for replacement of a damaged garbage bin
		Public Trash Can Issue	Report overflowing public trash cans to be emptied
		Illegal Dumping	Report report large amounts of trash bags or more, bulk items, or building materials that appeared overnight or a witnessed act of dumping from a vehicle
		Missed Residential Garbage	Report missed residential garbage collection
	Recycling	Missed Recycling	Report missed residential recycling collection
	Graffiti	Graffiti Removal	Report graffiti on private or public property
Parks and Trees	Parks	Park Cans	Request to have overflowing trash cans and trash around cans removed from Recreation & Parks properties
		Park Maintenance	Request maintenance at within public park or at a park structure (e.g., pavilion or gazebo). Typical park maintenance requests include trash on grounds, basketball replacement, tennis/ basketball court repairs, fences repairs, bench repairs, masonry work, water fountain repairs and other outside water leaks.

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Service Request Catalog Items (continued)

Category	Subcategory		Description
	Trees	Street Tree Down	Report a loose or fallen limb from a city street tree that is a hazard to transit or public safety
		Street Tree Inspection	Request an inspection of a City street tree that may need removal or pruning.
		Tree Planting Request	Requests to plant a tree on the City parkway in front of your house.
		Tree Removal Request	Request to remove a dead or diseased tree on the public way.
Public Safety	N/A	Equipment Noise Complaint	Report excessive noise coming from air conditioners, compressors, generators, or any other piece of industrial or commercial equipment.
		Spills or Dumping in Natural Water Ways	Report pollution into rivers, lakes, canal, or sewers.
		Water Supply Issues	Report issues with water supply or no water to property
Streets and Sidewalks	Streets	Street Cleaning Request	Request for curb to curb sweeping the debris off the street by a street sweeping machine
		Water On Street	Report water that remains on the street due to broken fire hydrants, drains etc.
		Remove Obstruction in the Right of Way (ROW)	Report items such as concrete poles, wood, tools, car parts, etc., that are obstructing the Right of Way (ROW)

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Service Request Catalog Items (continued)

Category	Subcategory		Description
		Potholes	Report a pothole (surface level damage to a street or a depression/hollow in a road surface caused by wear or subsidence.)
	Sidewalks	Sidewalk Inspection Request	Report the condition of City sidewalks or accessibility (ADA) ramp issues
Traffic and Parking	Parking	Broken Parking Meter	Report a broken parking meter
		Parking Complaint	Report suspected illegal parking
	Traffic	Damaged or Missing 'Do Not Enter' signs	Report maintenance issues to damaged or missing "Do Not Enter" signs.
		Damaged or Missing Stop Signs	Report maintenance issues to damaged or missing "Stop" signs
		Damaged or Missing Street Name Sign	Report a damaged or missing street name sign in need of replacement or repair
		Traffic Signal Out	Report traffic signals and/or pedestrian crosswalk signals that are not working or are flashing
Water & Sewer	Sewer	Sewer Investigation	Report any sewer related issues such as sewer/sanitary manhole cover damage/missing, an odor of sewage with no visual evidence, or maintenance of tree roots in a sewer drain which could cause a backup.
	Water	Sewer Overflow	Report sewer water leaking or overflowing from outside pipes.

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Service Request Catalog Items (continued)

Category	Subcategory		Description
		Water Meter Cover Missing or Damaged	Report a missing or damaged water meter cover.
		Water Odor or Bad Taste	Report any unusual smell or taste associated with a dwelling's tap water.
		Open Hydrant	Report water flowing from a hydrant nozzle.

Information Request Catalog Items

Category	Description
FOIA Request	Submit a request to obtain FOIA information that is not readily available as part of this government agency's normal business services.
Public Request	Submit a request to obtain public information that is not readily available as part of this government agency's normal business services.

License and Permit Request Catalog Items

Category	Description
Request License	Submit an application for a commercial fishing license.

Social Benefits Request Catalog Items

Category	Description
Apply for Nutrition Assistance	Request financial assistance for individuals and families to afford food.
Apply for Unemployment Insurance	Request temporary cash benefits for workers who have become unemployed through no fault of their own and are currently capable of, available for, and actively seeking work.
Request Vocational Rehabilitation Services	Request support for individuals with intellectual and developmental disabilities.

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Life cycle of a Public Service case

A public service request case within one of the three Public Sector Digital Services playbook applications can be in one of several states as it progresses through the fulfillment cycle.

Public Service request case stages

A public service request case has four stages:

- Intake
- Review
- Process
- Decision

As a public service request case moves through the stages listed above and toward a resolution, the case status is updated. Stage and status are related to each other as described in the following table.

Public service request case stages and status

Case Stage	Case Status	Description
	Draft	The case has not yet been submitted, and the public service request case record has not yet been created.
Intake Guides the agent to collect the information needed to create the public service request case.	New	The initial status for a new public service case created through the Government Service Portal or one of the Public Sector Digital Services playbooks. In this state, a government service agent can do one of the following: • **Assign to me**: Assign themselves the case. The state changes to **Open**. • **Accept**: If the case was assigned to the agent by a government service manager, the can agent accept or re-assign the case. If accepted, the state changes to **Open**. • **Update**: Update the case. • **Close Case**: Close the case. • **Delete**: Delete the case. In this state, a constituent can do either of the following: • **Update**: Update the case with additional information. • **Close Case**: Close the case.
	Open	A case changes from **New** to **Open** when a government service agent assigns the case to themselves (**Assign to me**), or accepts a case assigned to them by a government service manager.

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Public service request case stages and status (continued)

Case Stage	Case Status	Description
		In this state, the agent can do one of the following: • **Update**: Update the case. • **Request Info**: Request additional information from the constituent. The case state changes to **Awaiting Info**. • **Propose Solution**: Propose a solution for the case. The case state changes to **Resolved**. • **Close Case**: Close the case. • **Delete**: Delete the case.
	Awaiting Info	Additional information has been requested from the constituent. In this state, the constituent can do one of the following: • **Update**: Add the requested information to the case. Once that information has been received, the case moves back to **Open**. • **Close Case**: Close the case.
Review Enables the agent to do initial troubleshooting on the case, check for similar or duplicate case requests, and determine what services need to be rendered.	Open	In this state, the agent can do one of the following: • Check to see if there are similar or duplicate requests. If so, the case can be moved to progress directly. • **Request an Inspection**: If an inspection is requested, the case status moves to **Inspection in Progress**
	Inspection in Progress	Inspection of the service location by a field service agent is in progress. Once complete, the case is moved to **Process**.
	Awaiting Info	If an agent requests more information at any time during the Review stage, the status of the case changes to **Awaiting Info**. In this state, the agent can do one of the following: • **Open Case**: Change the case state back to **Open**. • **Update**: Update the case. • **Close Case**: Close the case. • **Delete**: Delete the case. In this state, the constituent can do one of the following:

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Public service request case stages and status (continued)

Case Stage	Case Status	Description
		• **Update**: Add the requested information to the case. Once the constituent updates the case, the state changes to **Open**. • **Close Case**: Close the case.
Process	Work in Progress	The case status changes to **Work in Progress**when the agent selects **Start Work**. A work order is now in progress to solve the public service request.
	Work Assignment in Progress	A work order is in progress, and the government service agent resolves any open case tasks associated with the case.
	Awaiting Info	The case moves to the Awaiting Info state when an agent selects **Request Info** to request more information from the requester. The agent has requested more information during or after work has been done to resolve the case.
Decision Allows the requester to review the agent's decision and either accept or reject.	Ready for Decision	The case is ready for an agent decision.
	Resolved	Once an agent provides a resolution code, enters resolution notes in the **Resolution Information** tab, and selects **Propose Solution**, the case state changes from **Awaiting Info** to **Resolved**. The **Resolution code** and **Resolution notes** fields are mandatory for an agent to propose a solution to the case. In this state, the agent can do one of the following: • **Update**: Update the case • **Close Case**: Close the case. A case cannot be closed by an agent or agent manager when it is in this state. In this state, the constituent can do one of the following:

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Public service request case stages and status (continued)

Case Stage	Case Status	Description
		• **Accept Solution**: Accept the solution proposed by the agent. The case state changes to **Closed** and a survey is displayed. • **Reject Solution**: Reject the solution proposed by the agent. The case state changes to **Open**. • **Delete**: Delete the case.
	Closed	After proposing a solution, the agent waits for a constituent response. • If the constituent clicks **Accept Solution**, the case state changes from **Resolved** to **Closed**. • If the constituent clicks **Reject Solution**, the state changes from **Resolved** to **Open**, and the agent must propose another solution. Closing a case as an agent or agent manager requires comments to be added to the **Resolution notes** field. This is not required when a customer closes a case. A case cannot be updated once it is closed.
	Cancelled	The public service request is cancelled.

Note: You can't edit a public service request case when the state of the case is set to **Closed complete** or **Canceled**.

Public Sector Digital Services forms

Use forms to view and update Public Sector Digital Services information.

The form is the user interface where agents do most of their work. Workspace form configurations work without modification in Configurable Workspace, but the configurations may affect the functioning of your Configurable Workspace.

Case forms and profile forms are the two main form types that government service agents and constituents interact with in the Public Sector Digital Services application. Forms and their fields are customizable by an admin, and can be mapped to specific tables to capture a variety of customer information.

Public Sector Digital Services Core Case Forms

Agents can create case forms to display detailed information about questions, requests, and issues that constituents, business stakeholders, or agents have. Constituents, business stakeholders, or agents can also view the form to see the status of their requests and service cases.

A government service agent creates a case to identify a constituent's request or issue and to track the activities related to resolving the issue. An agent also uses a case to track communication to and from the constituent, including the communication channels being used.

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Case activities include any action that is taken to resolve an issue. This can include phone calls or emails, knowledge base research, conversations with subject matter experts, and dispatch requests to field service agents, as well as other activities.

From the Case form, an agent can associate and store the related information, such as the constituent or applicant's name, phone number, and company; account information; application details, and any associated service level agreements (SLAs).

There are several key features to a case.

- Communication between an agent and the constituent or applicant, or between an agent and other employees within the organization. Details of all internal and external communication are recorded on the Case form.
- Any additional tasks that result from a case, such as a work order. Tasks are tracked from a related list on the Case form. These tasks may be internal to the organization or they may involve the constituent.
- Information from the case that can be included in the knowledge base and used to help resolve other cases.

There are two different Case form views: a detailed view that is available to agents and agent managers in the Public Sector Digital Services application and a simplified view that is available to constituent from the Government Service Portal.

Government Service Case form

A government service agent creates a case to identify a constituent's request, and to track the activities related to resolving the issue. The Case form captures and displays detailed information about a constituent's issue or request.

Government Service Case form

Field	Description
Number	Auto-generated number for the case. Numbers for cases use the default prefix GOVCS.
Applicant type	Type of applicant: • Individual • Business • Agency
Business	Name of the business. If the business does not exist, the agent can create a business record from the case.
Business contact	Name of the business contact. If the business contact does not exist, the agent can create a business contact record from the case.
Channel	Method by which the constituent initiated contact and the case was opened: • Web (default) • Phone • Email • Chat • Social • Community

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Government Service Case form (continued)

Field	Description
	• Alert • Virtual Agent • In Person
Constituent	Name of the constituent. If the constituent does not exist, the agent can create a constituent record from the case.
Requested by agency	Name of the agency that requested the case.
Assigned to agency	Name of the agency that is assigned with the case.
Service	The requested service indicated in the case.
Opened	Date and time that the case was opened.
Priority	The assigned priority: • 1 — Critical • 2 — High • 3 — Moderate • 4 — Low (default)
Assignment group	Assigned government service agent group.
Assigned to	Assigned agent. If a group is selected in the **Assignment group** field, the assigned agent must belong to this group.
Primary purpose	The reason that the constituent created the case: • Constituent Benefits: services that constituents can apply for. • Governance Procedures: other types of cases such as Frauds, Appeals, Investigations, Complaints.
Partner	The name of the partner company.
Partner contact	The name of the partner contact for this case.
Short description	Brief description of the question, request, or issue.
Applicant Information	
Primary identification type	The type of document used as a constituent identification: • Social Security Number • State Identification Number

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Government Service Case form (continued)

Field	Description
	• Driver's License Number • Medicare ID
Identification field	One of the following fields based on the selection in the **Primary Identification type** field: • Social Security Number • State Identification Number • Driver's License Number • Medicare ID
Email	The email address of the requester.
Street	The street name for the primary address.
City	The city for the primary address.
State/ Province	The state or province for the primary address.
ZIP/Postal Code	The ZIP code or postal code for the primary address.
Country	The country of the requester.
Application Information	
Reported date	The date that the case was submitted. This field defaults to the case creation date but can be changed.
Decision date	The date that a decision about the case was reached.
Application status	The status of the application: • Approved • Declined
Description	A description about the case status.
Notes	
Watch list	Users who receive notifications about this case when additional comments are added or if the state of a case is changed to **Resolved** or **Closed**. Click the add me icon to add yourself to the watch list.
Work notes list	Internal users who receive a notification about this case when work notes are added. You can only add internal users to the work notes list. Click the add me icon to add yourself to the watch list.
Additional comments	Comments for the case that are visible to the constituent.

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Government Service Case form (continued)

Field	Description
(Customer visible)	
Work notes	Information about how to resolve the case or steps taken to resolve it, if applicable. Internal users who have been added to the Work notes list receive a notification that Case work notes have been added. You can configure the notification, as required. The notes are viewable by the admin, agent, and agent manager.
Contributors	
Contributor Users	When a user with the case task agent role (sn_customerservice.case_task_agent) is assigned to a case task, the user is added to the **Contributor Users** field. If this user is removed from the **Assigned to** field on the Case Task form, and this user is not assigned to any other tasks for the case, the user is also removed from the **Contributor Users** field.
Contributor Groups	When a user with the case task agent role (sn_customerservice.case_task_agent) is assigned to a case task, the user's assignment group is added to the **Contributor Groups** field. If the user is removed from the **Assigned to** field on the Case Task form, and no other member of their assignment group is assigned to any other tasks for the case, the assignment group is removed from the **Contributor Groups** field. If a group is removed from the **Assignment group** field on the Case Task form, and the group is not assigned to any other tasks for the case, the assignment group is removed from the **Contributor Groups** field.
Resolution Information	
Resolved by	Agent that the case is assigned to when the case is resolved.
Resolved	Date and time that the case was resolved.
Resolution code	List of the resolution states for the case. This field is mandatory when an agent proposes a solution for a case.
Closed by	Name of the user who closed the case.
Closed	Date and time that the case was closed.
Cause	Details about the cause of the resolution.
Resolution notes	Details about how the case was closed. This field is mandatory if a customer service agent or agent manager closes a case. If a constituent closes a case, it is not mandatory.

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Government Service Case form related lists

The Case form includes related lists that store case information and that agents can use to perform case-related tasks. Government agents are able to access a service request case, information request case, or license and permit case and view the following related lists.

Government service case form related lists

Related List	Description
Case Tasks	Tasks that have been created for this case by the government service agent or agent manager. When you create a task or change the state of a task, the information is recorded in the case **Activity** field. When you create a case task, the system generates a task number with a prefix. New and existing case tasks, regardless of state, both use the CSTASK prefix.
Related Parties	A list of related parties, such as contacts or constituents added to the case.
Related Cases	A list of cases created for the same account or contact.
Work Orders	A list of work orders created for this case.
Interactions	A comprehensive list of interactions created between constituents and government service agent for this case. Interactions use the IMS prefix.
SLAs	The service level agreements that are associated with this case.
Draft Emails	Emails that are unsent.
Emails	The case email log. A list of the emails that are sent or received as part of resolving this case. The government service agent or agent manager can send email from within the case, such as updates and inquiries to constituents or other agents or parties. A change in the state of the case triggers an automatic email to be sent to the constituent. Constituent contacts can create and update cases by email as well as receive updates from government service agents.
Blocked Tasks	A list of blocking tasks that have been created for this case. A blocking task is something that prevents the agent from making progress toward case resolution.
Escalations	A list of escalation records that are related to this case.
Attached Knowledge	Knowledge articles attached as a proposed solution to the case.
Knowledge Gaps	Feedback tasks that are created when a knowledge gap is reported.
Appointments	Appointments that the government agent makes with the constituent or others as part of resolving this case. When you create an appointment, an appointment creation message is recorded in the case **Activity** field. The user selected in the **To** field on the appointment form receives an email with the appointment details.

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Service Request case form

A government service agent can create a case using the Service Request case form to capture detailed information about questions, requests, and issues that constituents, business stakeholders, or agents have. Constituents, business stakeholders, or agents can also view the form to see the status of their requests and service cases.

A government service agent creates a case to identify a constituent's question or issue and to track the activities related to resolving the issue. An agent also uses a case to track communication to and from the constituent, including the communication channels being used.

Case activities include any action that is taken to resolve an issue. This can include phone calls or emails, knowledge base research, conversations with subject matter experts, and dispatch requests to field service agents, as well as other activities.

From the Case form, an agent can associate and store the related information, such as the constituent's name, phone number, and company; account information; product and asset information; service contract and entitlement details, and any associated service level agreements (SLAs).

There are several key features to a case.

- Communication between an agent and the constituent or an agent and other employees within the organization. Details of all internal and external communication are recorded on the Case form.
- Any additional tasks that result from a case, such as a work order. Tasks are tracked from a related list on the Case form. These tasks may be internal to the organization or they may involve the constituent.
- Information from the case that can be included in the knowledge base and used to help resolve other cases.

There are two different Case form views: a detailed view that is available to agents and agent managers in the Public Sector Digital Services application and a simplified view that is available to external constituents from the Government Service Portal.

Agent view

The agent view of the Case form includes the following components:

- A timeline that provides a visual display of case activities.
- Referenced entities for the case including account and contact information, product and asset information, service contract and service entitlement details, and any pertinent SLAs. Except for SLAs, this information exists in the system and can be associated with the case by the agent or agent manager.
- All communication about the case, both external and internal. This information is stored in the **Additional comments** field (external communication), the **Work notes** field (internal communication), the **Resolution notes** field. The **Resolution notes** field stores details about the case resolution, and the **Activity** field, which stores all communication in a chronological list.

Agents and managers can view a Case form in the Public Sector Digital Services application by navigating to **Lists** > **Service Requests** and selecting one of the following menu options:

- **All**
- **My Cases**

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- **My Open**
- **Unassigned for my group**

From the Case list, click a case number to display the Case form.

Government Service Case form (agent view)

Field	Description
Number	Auto-generated number for the case. Numbers for cases use the default prefix GOVCS.
Opened	Date and time that the case was opened.
Applicant type	Type of applicant: • Individual • Business • Agency
Business	Name of the business. If the business does not exist, the agent can create a business record from the case.
Business contact	Name of the business contact. If the business contact does not exist, the agent can create a business contact record from the case.
Constituent	Name of the constituent. If the constituent does not exist, the agent can create a constituent record from the case.
Priority	How quickly the agent should address the service request. Priority ranking is as follows: • 1 — Critical • 2 — High • 3 — Moderate • 4 — Low (default)
Channel	Method by which the constituent initiated contact and the case was opened: • Web (default) • Phone • Email • Chat • Social • Community • Alert • Virtual Agent • In Person
Primary purpose	The reason that the constituent created the case:

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Government Service Case form (agent view) (continued)

Field	Description
	• **Constituent Benefits**: services that constituents can apply for. • **Governance Procedures**: other types of cases such as Frauds, Appeals, Investigations, Complaints. Defaults to **Constituent Benefits**.
Service	The requested service indicated in the case. By default, this field will show public services with 'Service type' = Service Requests.
Assigned to agency	Name of the agency that is assigned with the case.
Requested by agency	Name of the agency that requested the case.
Assignment group	Assigned government service agent group.
Assigned to	Agent(s) the case is assigned to. If a group is selected in the **Assignment group** field, the assigned agent must belong to this group.
Service	Requested service that is indicated in the case.
Short description	Brief description of the question, request, or issue. Users can use the related search results to find a list of knowledge base articles with a possible solution.
Request Location	
Address Type	The type of location where the issue is being reported. **Address** or **Intersection**
Street	The address where the issue is located. This field is only required if **Address**is selected as the Address type.
First Cross Street, Second Cross Street	The cross streets where the issue is located. This field is only required if **Intersection**is selected as the Address type.
City	The city where the issue is located.
State/ Province	The state or province where the issue is located.
ZIP/Postal Code	The ZIP code or postal code where the issue is located.
Country	The country where the issue is located.
Latitude, Longitude	The coordinates where the issue is located. This field is required for either address type, and auto-populates based on the address data entered.
Request Details	
Reported date	The date that the case was submitted. This field defaults to the case creation date but can be changed.
Description	A description about the case status.
Applicant Information	

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Government Service Case form (agent view) (continued)

Field	Description
Primary identification type	The type of document used as a constituent identification: • Social Security Number • State Identification Number • Driver's License Number • Medicare ID
Identification field	One of the following fields based on the selection in the **Primary Identification type** field: • Social Security Number • State Identification Number • Driver's License Number • Medicare ID
Email	The email address of the requester.
Street	The street name for the primary address.
City	The city for the primary address.
State/ Province	The state or province for the primary address.
ZIP/Postal Code	The ZIP code or postal code for the primary address.
Country	The country of the requester.
Notes	
Watch list	Users who receive notifications about this case when additional comments are added or if the state of a case is changed to **Resolved** or **Closed**. Click the add me icon to add yourself to the watch list.
Work notes list	Internal users who receive a notification about this case when work notes are added. You can only add internal users to the work notes list. Click the **add me** icon to add yourself to the watch list.
Additional comments (Constituent visible)	More information about the issue as needed. All users who can view incidents can also see additional comments.
Work notes	Information about how to resolve the case or steps taken to resolve it, if applicable. Internal users who have been added to the Work notes list receive a notification that Case work notes have been added.

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Government Service Case form (agent view) (continued)

Field	Description
	You can configure the notification, as required. The notes are viewable by the admin, agent, and agent manager.
Contributors	
Contributor Users	When a user with the case task agent role (sn_customerservice.case_task_agent) is assigned to a case task, the user is added to the **Contributor Users** field. If this user is removed from the **Assigned to** field on the Case Task form, and this user is not assigned to any other tasks for the case, the user is also removed from the **Contributor Users** field.
Contributor Groups	When a user with the case task agent role (sn_customerservice.case_task_agent) is assigned to a case task, the user's assignment group is added to the **Contributor Groups** field. If the user is removed from the **Assigned to** field on the Case Task form, and no other member of their assignment group is assigned to any other tasks for the case, the assignment group is removed from the **Contributor Groups** field. If a group is removed from the **Assignment group** field on the Case Task form, and the group is not assigned to any other tasks for the case, the assignment group is removed from the **Contributor Groups** field.
Resolution Information	
Resolved by	The agent to whom the case is assigned when the case is resolved.
Resolved	Date and time that the case was resolved.
Closed by	Name of the user who closed the case.
Closed	Date and time that the case was closed.
Resolution code	List of the resolution states for the case. This field is mandatory when an agent proposes a solution for a case. By default, this field is set to **Resources Not Approved**.
Cause	Details about the cause of the resolution.
Resolution notes	Details about how the case was closed. This field is mandatory if a government service agent or agent manager closes a case. If a constituent closes a case, it is not mandatory.
Related Records	
Parent	Associated parent incident that makes the current incident a child incident. **Note:** When the parent incident is resolved, the child incident is also marked as resolved.
Problem	Any related problem record.
Change Request	Any related change request.

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Government Service Case form (agent view) (continued)

Field	Description
Caused by Change	Associated change request that prompted the creation of the incident.

Constituent view

Users with the constituent or business contact role can view Case forms by selecting **Your Cases** in the government service portal header, then selecting the case number from the Case list.

The constituent or business contact view of the Case form includes the following components:

- A process flow formatter that indicates the current state of the case.
- The related entity information, including agency and contact information, pending service case task information, and service request information.
- An **Activity** field that stores all communication for the case in a chronological list.

Service Request Case Task form

Service Request case form displays detailed information about a service request cae task.

The Service Request Case Task form displays information about service request case tasks, which are created and assigned to agents to complete the work to resolve service request cases.

The case task form includes the following fields.

Service Request Case Task form

Field	Description
Number	Automatically assigned case task number.
Priority	Assigned priority: • 1 - Critical • 2 - High • 3 - Moderate • 4 - Low (default)
Parent	Case that this case task was created for. This can be a case from the Case table (sn_gsm_government_service_case) or any child tables of the Case table.
State	Current state of the case task: • Open • Awaiting Info • In Progress • Closed
Associated Table	Table associated with this task.

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Service Request Case Task form (continued)

Field	Description
Associated Record	Records that are associated with this task.
Assigned to	Assigned user.
Subject	Subject of the case task.
Description	Description of the work that needs to be done in order to complete the case task.
Work Notes List	Customizable list of agents that can view the work notes.
Work notes (Private)	Free-form private work note text viewable to assigned agents only.
Additional comments	Notes that are visible to the constituent. Agents can use this field to request more information from the constituent.

Information Request case form

A government agent can create a case by using the Information Request case form to capture detailed information about public record requests that constituents, business stakeholders, or other agents have. Constituents, business stakeholders, or agents can also view the form to see the status of their information requests.

Information Service Case form

Field	Description
Number	Auto-generated number for the case. The numbers for the cases use the default prefix GOVCS.
Opened	Date and time that the case was opened.
On Behalf Of	Name of the contact for which the record is being requested on behalf of. This field is required if the **Requesting on behalf of someone** check box is selected.
Applicant type	Type of applicant: • Individual • Business • Agency
Business	Name of the business, if the business is selected as the applicant type. If the business doesn't exist, the agent can create a business record from the case.
Business contact	Name of the business contact. If the business contact doesn't exist, the agent can create a business contact record from the case.
Constituent	Name of the constituent, if the individual is selected as the applicant type. If the constituent doesn't exist, the agent can create a constituent record from the case.
Priority	Assigned priority:

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Information Service Case form (continued)

Field	Description
	• 1 — Critical • 2 — High • 3 — Moderate • 4 — Low (default)
Service	Requested service that is indicated in the case.
Channel	Method by which the constituent initiated contact and the case was opened: • Web (default) • Phone • Email • Chat • Social • Community • Alert • Virtual Agent • In Person
Assigned to agency	Name of the agency that is assigned to the case.
Assignment group	Government agent group to which this case is assigned.
Assigned to	Name of the agent that is assigned to this case. If a group is selected in the **Assignment group** field, the assigned agent must belong to this group.
Primary purpose	Reason that the constituent created the case: • Constituent Benefits: Services that constituents can apply for. • Governance Procedures: Other types of cases such as frauds, appeals, investigations, or complaints.
Short description	Brief description of the question, request, or issue.
Applicant Information	
Primary identification type	Type of document that is used as a constituent identification: • Social Security Number • State Identification Number • Driver's License Number • Medicare ID

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Information Service Case form (continued)

Field	Description
Preferred communication method	Preferred communication method of the requester: • None • Email • Mail • Call
Identification field	Field that is based on the selection in the **Primary Identification type** field: • Social Security Number • State Identification Number • Driver's License Number • Medicare ID
Email	Email address of the requester.
Street	Street name for the primary address.
City	City for the primary address.
State/Province	State or province for the primary address.
ZIP/Postal Code	ZIP code or postal code for the primary address.
Country	Country of the requester.
Application Information	
Description	Description about the case status.
Fee waiver	Whether the requester believes the case qualifies for a fee waiver.
Fee waiver justification	Justification for a fee waiver qualification. Certain types of requesters automatically qualify for a fee waiver.
Expedited processing	Whether expedited processing is needed.
Expedited processing justification	Justification for requesting expedited processing.
Requester type	Type of requester: • Representative of the news media • Educational Institution • Non-commercial scientific institution • Commercial use requester • All other requesters
Fees willing to pay	Estimate of the fees that the requester is willing to pay to have this request fulfilled.

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Information Service Case form (continued)

Field	Description
Estimated fees	Estimate of the fees required to fulfill this request.
No exemption code applicable	Box that is selected if none of the nine exemptions from the exemption checklist apply to this case.
Notes	
Watch list	Users who receive notifications about this case when additional comments are added or if the state of a case is changed to **Resolved** or **Closed**. Select the add me icon to add yourself to the watch list.
Work notes list	Internal users who receive a notification about this case when work notes are added. You can only add internal users to the work notes list. Select the add me icon to add yourself to the watch list.
Additional comments (Customer visible)	Comments for the case that are visible to the constituent.
Work notes	Information about how to resolve the case or steps taken to resolve it, if applicable. Internal users who have been added to the Work notes list receive a notification that Case work notes have been added. You can configure the notification, as required. The notes are viewable by the administrator, agent, and agent manager.
Contributors	
Contributor Users	When a user with the case task agent role (sn_customerservice.case_task_agent) is assigned to a case task, the user is added to the **Contributor Users** field. If this user is removed from the **Assigned to** field on the Case Task form, and this user isn't assigned to any other tasks for the case, the user is also removed from the **Contributor Users** field.
Contributor Groups	When a user with the case task agent role (sn_customerservice.case_task_agent) is assigned to a case task, the user's assignment group is added to the **Contributor Groups** field. If the user is removed from the **Assigned to** field on the Case Task form, and no other member of their assignment group is assigned to any other tasks for the case, the assignment group is removed from the **Contributor Groups** field. If a group is removed from the **Assignment group** field on the Case Task form, and the group isn't assigned to any other tasks for the case, the assignment group is removed from the **Contributor Groups** field.

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Information Service Case form (continued)

Field	Description
Resolution Information	
Resolved by	Agent that the case is assigned to when the case is resolved.
Resolved	Date and time that the case was resolved.
Resolution code	List of the resolution states for the case. This field is required when an agent proposes a solution for a case.
Closed by	Name of the user who closed the case.
Closed	Date and time that the case was closed.
Cause	Details about the cause of the resolution.
Resolution notes	Details about how the case was closed. This field is required if a customer service agent or agent manager closes a case. If a constituent closes a case, it isn't required.

Information Request Case form related lists

The Case form includes related lists that store case information and that agents can use to perform case-related tasks.

Information request case form related lists

Related List	Description
Related Parties	A list of related parties, such as contacts or constituents added to the case.
Documents	Agents can: • Add documents to the information request without making them visible to the requester • View a list of documents added to the Information Request • View documents approved to be published to the requester • Publish approved documents to the requester To view the Documents related list, you must first install the Document Management plugin.
Escalations	A list of escalation records that are related to this case.
Attached Knowledge	Knowledge articles attached as a proposed solution to the case.
Knowledge Gaps	Feedback tasks that are created when a knowledge gap is reported.
Appointments	Appointments that the information request case agent makes with the constituent or others as part of resolving this case.

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Information request case form related lists (continued)

Related List	Description
	When you create an appointment, an appointment creation message is recorded in the case **Activity** field. The user selected in the **To** field on the appointment form receives an email with the appointment details.

Public Sector Digital Services Core Profile Forms

Profile forms display detailed information about a constituent, agent, or business. This information is collected on registration for the Government Service Portal.

Business Profile form

Use the Business Profile form in Public Sector Digital Services to capture and display the details about a business. You can add the name and address of the business owner, trademark status, industry information, partner records, or business structure.

The Business Profile form displays detailed information about a business and its contacts. This information is collected on registration for the Government Service Portal.

Business Profile form

Field	Description
Business	
Name	Name of the business.
Email	Primary contact email for the business.
Street	Street address where the business is located.
City	City where the business is located.
State/ Province	State or province where the business is located.
Zip / Postal Code	ZIP code of the business address.
Country	Country where the business is located.
Business Phone	Primary contact phone number for the business.
Business Information	
Customer	Customer contact for the business.
Partner	Partner of the business.
Identification Number	Reference number for the business entity.
Tax ID number	Tax ID number.
Business Structure	Details about the structure of the business.

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Business Profile form (continued)

Field	Description
Legal Entity Name	Name of the business owner.
Trademark	Trademark of the business.
Assumed Name	Registered business owner name.
Date of incorporation	Date that the business was incorporated.
Industry	Industry of the business.
Additional Information	
Minority ownership status	Option to indicate that a business is owned by a minority.
Rural based status	Option to indicate that a business is based in a rural area.
Tribal affiliation status	Option to indicate that the business owner is affiliated with a tribe.
Women ownership status	Option to indicate that a business is owned by a woman.
Veteran Ownership Status	Option to indicate that a business is owned by a veteran.
Contact registration information	
Business registration code	Registration code. If a request is submitted with a valid registration code, the business account information is automatically detected and added to the business record.
Primary Contact Information	
Primary identification type	Type of primary identification: • Social Security Number • State Identification Number • Drivers License Number • Medicare ID
Identification field	Type of identification. This field appears only when an option is selected from the **Primary identification type** field: • Social Security Number • State Identification Number

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Business Profile form (continued)

Field	Description
	• Drivers License Number • Medicare ID

Agency Profile form

Use the Agency Profile form in the Public Sector Digital Services application to capture and display the details about an agency and the cases that they're involved in.

The Agency Profile form displays detailed information about an agency and its agents.

Agency Profile form

Field	Description
Number	Auto-generated number for the agency.
Name	Name of the agency.
Manager	Name of the agency manager.
Parent Agency	Name of the parent agency.
Street	Mailing street address of the agency.
City	City in which the agency is located.
State/Province	State or province in which the agency is located.
Zip/Postal Code	ZIP or postal code of the agency.
Website	URL of the agency website.
Email	Primary contact email of the agency.
Phone	Primary contact phone number of the agency.
Identification Number	Auto-generated identification number for the agency.
Type	Type that defaults to **Agency**
Subtype	Agency subtype: • Local • County • State • Federal

Constituent Profile form

Use the Constituent Profile form in the Public Sector Digital Services application to display detailed information about a constituent, such as the name and address, date of birth, contact information, and language choice.

The following table describes the detailed information that you can add to the Constituent form.

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Agency Service Constituent form

Field	Description
Consumer reference	Reference number for the constituent case.
First name	First name.
Last name	Last name.
Middle name	Middle name.
Number	Phone number of the constituent.
Suffix	Suffix of the constituent name. The suffix may include MD or Jr.
Mobile phone	Mobile phone number for the constituent.
Business phone	Business phone number for the constituent.
Fax	Fax number.
Photo	Photo of the constituent.
Email	Email of the constituent.
Gender	Gender of the constituent.
Date of birth	Date of birth of the constituent.
Country of birth	Country of birth of the constituent.
Age	Age of the constituent.
Identification Information	
Primary identification type	Type of primary identification: • Social Security Number • State Identification Number • Drivers License Number • Medicare ID
Identification field	Type of identification. This field appears only when an option is selected from the **Primary identification type** field. • Social Security Number • State Identification Number • Drivers License Number • Medicare ID
Primary correspondence Information	
Primary address type	Type of primary address for the constituent: • Home address • Business address • Mailing address

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Agency Service Constituent form (continued)

Field	Description
Street	Street of the constituent.
City	City that the constituent lives in.
State/Province	State in which the constituent lives.
ZIP/Postal code	ZIP code for the address of the constituent.
Latitude	Latitude of the address of the constituent.
Longitude	Longitude of the address of the constituent.
Primary phone number	Primary phone number of the constituent.
Additional information	
Marital status	• Married • Single • Divorced • Widowed • I do not wish to provide this information
Employment status	• Employed • Unemployed • Self employed • I do not wish to provide this information
Race	• American Indian or Alaska Native • Asian • Native Hawaiian or other Pacific Islander • Black or African American • White • I do not wish to provide this information
Ethnicity	• Hispanic or Latino • Not Hispanic or Latino • I do not wish to provide this information
Military status	• Active duty • Veteran

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Agency Service Constituent form (continued)

Field	Description
	• No military duty • I do not wish to provide this information
Disability status	• Yes, I have a disability • No, I do not have a disability • I do not wish to provide this information
Highest education level	• High school or equivalent • Technical or occupational certificate • Associate degree • Some college coursework completed • Bachelor's degree • Master's degree • Doctorate • Professional • Other
Primary language choice	• English • Spanish
Notes	
Notes	Additional notes about the constituent or the case.

Public Sector Grants Management reference

Reference tables and forms for configuring and using Grants Management capabilities.

This section provides additional information that you may require while setting up or using the Grants Management or the grants management portals.

Grants Management date validations

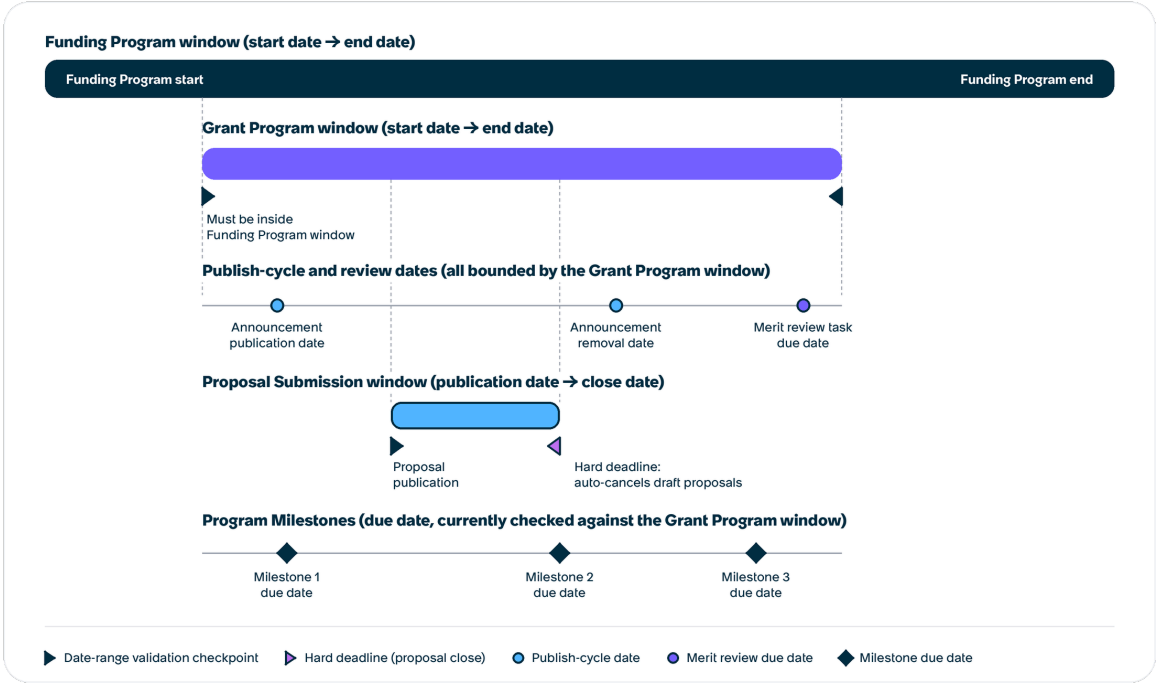
The Grants Management date validations hierarchy defines how funding timelines nest and relate to one another in the grants management system. All dates are validated in sequence to prevent scheduling conflicts and ensure conformance with funding program constraints.

Date definitions

The date hierarchy, visually represents the nesting relationship of all dates in the Grants Management system.

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Date hierarchy



The following table defines each date used in the grants management validation hierarchy and the phase it occurs in:

Grants Management date definitions

Date	What it means	Phase
Funding Program start date	The date the funding program's overall funding window opens. Every Grant Program created under it must start on or after this date.	Funding Program setup
Funding Program end date	The date the funding program's overall funding window closes. Every Grant Program under it must end on or before this date.	Funding Program setup
Grant Program start date	The date this specific grant program's own window opens; every internal date must fall on or after it.	Grant Program setup
Grant Program end date	The date this grant program's own window closes; every internal date must fall on or before it.	Grant Program setup
Announcement publication date	The date the program's public announcement goes live on the portal.	Publish program
Proposal publication date	The date applicants can begin submitting proposals. Indicates when the "Apply Now" button is enabled, allowing applicants to begin submitting proposals.	Publish program
Proposal close date	The hard deadline for proposal submission. After this date, new submissions are blocked and any proposal still in Draft is auto-cancelled by the "Cancel Expired Grant Proposals" scheduled job.	Publish program
Announcement removal date	The date the public announcement is taken down from the portal.	Publish program

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Grants Management date definitions (continued)

Date	What it means	Phase
Review task due date	The deadline for the Merit Review activity's review task.	Merit Review
Milestone due date	The deadline for a Performance Milestone defined on the program.	Grant Program setup (Performance Milestones activity)
Goals (Calendar period)	The calendar period attached to a proposal goal.	Proposal Narrative
Deliverables (Calendar period)	The calendar period attached to a Goal's deliverable.	Proposal Narrative

Error prevention checklist

When setting up a new grant program, verify:

- Grant Program: Grant program dates fall entirely within Funding Program dates.
- Merit review: All Merit Review task due dates are within Grant Program window and not in the past.
- Publish Program:
  - *Publish Now*:

    When selected, the program will be published immediately. These two date fields must be entered manually:

    - Proposal close date
    - Announcement removal date

    Note: These two date fields don't appear on the form but are automatically populated to the current system date and time:

    - Announcement Publication Date: Set to current date and time
    - Proposal Publication Date: Set to current date and time

  - *Schedule Publication*:

    When selected, allows you to manually define future publication dates. These dates must satisfy the sequence requirements:

    ```
    Announcement publication date ≤ Proposal publication date ≤
     Proposal close date ≤ Announcement removal date
    ```

- Proposal deliverables: All Proposal Submission window dates are within Grant Program window.
- No circular date dependencies. For example, an end date before a start date.

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Date validations by grant setup activity

The following table captures the grants date validations across every grant phase or activity.

Note: The two-digit year format (yy) isn't supported. Use the dd/mm/yyyy format.

Date validations by grant phase or activity

Phase	Condition	Result	Message shown	Where the validation lives (Server/Client logic)
Grant Program	Program start date is after the earliest of the other dates in the same grant program (milestone dates excluded).	BLOCKED	The program start date cannot be after the {date name} {date}.	ServiceApplicantPgrmMgmtUtilImpl.onValidateStartAndEn
	Program end date is before the latest of its other dates (milestone dates excluded).	BLOCKED	The program end date cannot be before the {date name} {date}.	ServiceApplicantPgrmMgmtUtilImpl.onValidateStartAndEn
	Program start date is before the funding program's start date.	BLOCKED	The program start date cannot be before the funding program start date {date}.	ServiceApplicantPgrmMgmtUtilImpl.onValidateStartAndEn
	Program end date is after the funding program's end date.	BLOCKED	The program end date cannot be after the funding program end date {date}.	ServiceApplicantPgrmMgmtUtilImpl.onValidateStartAndEn
Publish program	Any of the four dates (Announcement Publication Date/Proposal Publication Date/Proposal Close Date/	BLOCKED	Date can't be before program start date. Date must be in the future.	onValidateDatesOfPublishProgram + isBetweenStartCurrentAndEndDate

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Date validations by grant phase or activity (continued)

Phase	Condition	Result	Message shown	Where the validation lives (Server/Client logic)
	Announcement Removal Date) is earlier than the current date/time, or before the Program Start Date.			
	A date is earlier than the running-maximum valid date already seen earlier in the sequence (Announcement Publication ≤ Proposal Publication ≤ Proposal Close ≤ Announcement Removal)	BLOCKED	Date can't be before {publish program-date option} Example: Date can't be before proposal publication date. Example: Date can't be before proposal close date.	onValidateDatesOfPublishProgram + isBetweenStartCurrentAndEndDate
	Any of the four dates is after the Program End Date.	BLOCKED	Date can't be after program end date.	onValidateDatesOfPublishProgram + isBetweenStartCurrentAndEndDate
Merit Review	Review task due date is set to a date before today.	BLOCKED	Date cannot be in the past.	Client script MeritReviewDateCheck
	Review task due date is before the Grant Program's own start date.	BLOCKED	The review task due date cannot be before the program start date.	Next Experience alert (alert_2)
	Review task due date is after the Grant Program's own end date.	BLOCKED	The review task due date cannot be after the program end date.	Next Experience alert (alert_2)

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Date validations by grant phase or activity (continued)

Phase	Condition	Result	Message shown	Where the validation lives (Server/Client logic)
Milestone	Milestone due date falls outside the program's start/ end dates, or is in the past.	BLOCKED	Inline error on the milestone due date field.	Milestones activity client logic (sn_gsm_grnt_mgmt)

Supported customization points

A customization point is the correct place to modify a validation's behavior. It's always a public wrapper class (like `ServiceApplicantPgrmMgmtUtil`), not the internal implementation (Impl) class.

The platform routes its own calls through the public wrapper. If you override the Impl class instead, your code won't run. It will also break on the next upgrade. The Impl class is an implementation detail that can be restructured without warning. Override the public wrapper class, not the Impl class.

The date-validation logic spans three application scopes. Stay in scope and confirm that you hold the correct scope and roles before editing. Select the matching scope access and roles to make changes:

- Service Applicant Program Management (sn_svc_appl_pgm_mg)
- Grants Management (sn_gsm_grnt_mgmt)
- Service Applicant Information (sn_svc_appl_info)

Important:

Customize program and publish opportunity date logic at the public API class `ServiceApplicantPgrmMgmtUtil` that callers already reference and not by subclassing internal implementation (Impl) classes. All components run within a specific application scope. Always test in a non-production instance first.

Customization points by validation area

Validation area	Customize at	Scope
Grant program & funding program dates	Public class `ServiceApplicantPgrmMgmtUtil`	sn_svc_app
Publish program dates	Public class `ServiceApplicantPgrmMgmtUtil`	sn_svc_app

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Customization points by validation area (continued)

Validation area	Customize at	Scope
Draft proposal auto-cancellation after close date	Scheduled Job "Cancel Expired Grant Proposals" (runs daily at 3:30 AM)	sn_gsm_gr
Proposal deliverables (Goals)	UX Client Script Include `serviceApplicantInfoUIUtils`	sn_svc_app
Milestones	Milestones activity client logic	sn_gsm_gr
Merit Review task due date	Client script MeritReviewDateCheck (past-date check) and `ServiceApplicantPgrmMgmtUtilImpl.onValidateStartAndEndDate` (same general check as Grant Program)	sn_svc_app

Grant Proposal funding statuses

Status values a grant proposal can hold during the Funding Allocation workflow, including the trigger, the responsible role, and whether the status is terminal.

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Status	Definition	Triggered by	Role	Terminal
Undecided	Default state after scoring. No recommendation applied.	System (automatic)	None	No
Marked for Funding	Grant program manager has flagged the proposal for potential funding. Tentative and reversible before submission.	Mark for funding action	Grant program manager	No
Marked for Decline	Grant program manager has flagged the proposal for potential decline. Tentative and reversible before submission.	Mark for decline action	Grant program manager	No
Submitted for Funding	Grant program manager has submitted the proposal to the Grant Program Director for potential funding as part of a Funding Request. Proposals are locked.	Send for approval action	Grant program manager	No
Submitted for Decline	Grant program manager has submitted the proposal to the Grant Program Director for potential decline as part of a Funding Request. Proposals are locked.	Send for approval action (decline track)	Grant program manager	No
Funding confirmed	Grant Program Director has confirmed the funding recommendation. Proceeds to award notice generation, agreement signing, and contracting.	Grant Program Director approves the funding request	Grant Program Director	Yes
Decline confirmed	Proposal formally declined after Grant Program Director review. Proceeds to rejection letter generation.	Grant Program Director approves the funding request (decline track)	Grant Program Director	Yes
Returned	Grant Program Director has sent the proposal back for revision. Proposal remains in the Returned state in the grant program manager's working queue. Budget is released.	Grant Program Director rejects the funding request	Grant Program Director	No

Grants Management App Dependencies

The following is a list of required plugins and app dependencies for Grants Management.

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Required Plugins

- com.snc.customerservice.demo
- com.snc.service_organization
- com.snc.csm_contributor_user
- com.snc.household
- com.sn_external_user_register
- com.snc.platform_document_management
- com.snc.signaturepad
- com.snc.financial_planning_pmo

Required App Dependencies

Application	Version
com.snc:app-customer-central	27.2.10
com.snc.npm:devsnc-sn-customer-activity	27.2.10
com.snc.npm:sn-customer-information	21.1.1
com.snc:app-consumer-service-portal	23.8.2
com.snc:app-csm-playbook	5.4.0
com.snc:app-ciwf-ui-component	3.6.0
com.snc:app-business-location	2.1.0
com.snc:app-install-base	3.1.2
com.snc:app-document-templates	27.0.0
com.snc:app-enterprise-content	2.11.0
com.snc:app-doc-verify	1.5.0
com.snc:policy-as-code-engine-ui	3.1.1
com.snc:policy-as-code-engine	3.1.1
com.snc.npm:sn-component-guidance-experience	35.0.1
com.snc:app-guided-decisions-guidance	35.0.1
com.snc:app-guided-decisions	34.0.1
com.snc.npm:sn-guided-action-experience	36.0.1
com.snc.npm:sn-guided-action-playbook-card	31.0.1
com.snc.npm:app-guided-decisions-experience	35.0.1
com.snc.npm:sn-next-best-action-list	34.0.1
com.snc:app-recommended-action	35.0.1
com.snc:app-cs-recommended-action	29.0.2
com.snc:app-recommended-action-advanced	10.0.2

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Required App Dependencies (continued)

Application	Version
com.snc.npm:sn-attach-article-guidance	9.0.0
com.snc:app-common-guidances	8.0.2
com.snc:app-alignment-planner-core	5.5.0
com.snc:app-planning-attributes-core	1.7.0
com.snc:app-goal-framework	4.7.0
com.snc:app-milestones	2.4.0
com.snc:app-alignment-workspace	8.4.0
com.snc:app-alignment-workspace-advanced	4.3.2
com.snc:app-smart-assessment-core	20.0.2
com.snc:sn-smart-assessment-designer	20.0.2
com.snc:sn-smart-assessment-connected	20.0.2

Budget categories in Grants Management

Budget categories.

By default, Grants Management comes with these categories. To configure these and add more, see Configure budget categories in Grants Management.

Budget Category	
Administration	
Contractual	
Equipment	
Fringe Benefits	
Indirect Costs	
Materials and Supplies	
Personnel (inc. Salaries and Wages)	
Travel	
Other	

Public Sector Digital Services Investigative Case Management reference

Reference tables and forms for configuring and using Investigative Case Management capabilities.

Related topics

- Completeness Rules by Investigative Case Management Entity Type
- Investigative Case Management case forms

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Completeness Rules by Investigative Case Management Entity Type

While most entity record fields are not mandatory, each entity record contains a completeness field that tracks whether the record has sufficient data to be searchable within ICM. The following rules outline the minimum amount of information required for each entity record type to be considered complete.

Person (sn_icm_person)

A person entity record is considered complete when all of the following fields are populated:

- First name
- Last name
- Date of birth
- One of the three identification paths:

Person Entity identification paths

Path	Required Fields
National Identifier	National identifier + Country of national identifier
Passport	Passport number + Country of passport number
Drivers License	Driver's license number + Driver's license state of issue + Driver's license country of issue

Organization (sn_icm_organization)

An organization entity record is considered complete when the following field is populated:

Unique Name.

Location (sn_icm_location)

A location entity record is considered complete when all of the following fields are populated:

- Name
- Location format
- Conditional fields based on Location format:

Location format conditional fields

Location Format	Required Fields
Address	Street address, City, State/Province, Zip/ Postal code, Country
GPS Coordinates	Latitude, Longitude

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Property (sn_icm_property)

A property entity record is considered complete when at least one of the following fields are populated:

Unique Name OR Serial Number.

Vehicle (sn_icm_vehicle)

A vehicle entity record is considered complete when all of the following fields are populated:

- Short description
- One of the two identification paths:

Vehicle entity identification paths

Path	Required Fields
License Plate	License plate number + State of registration + Country of registration
VIN	VIN

Firearm (sn_icm_firearm)

A firearm entity record is considered complete when **all** of the following fields are populated:

- Gun make code
- One of the following:
  - Serial number
  - Alternate serial number

Investigative Case Management case forms

The Investigative Case Management case forms help capture information related to an investigative case.

Related topics

Investigative Case Management case details form

Investigative Case Management Entity Management forms

Investigative Case Management Evidence Management forms

Investigative Case Management case details form

The Investigative Case Management case details form help an investigator capture the preliminary information for an investigative case.

Case details form

Field	Description
Classification Code	Classification Code of the case.
Case Title	Title of the case.
Case Summary	Summary of the case.

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Case details form (continued)

Field	Description
Source From	Where the case originated from.
Source Description	Description of where the case originated from.
Assigned office	The agency office to which the case is assigned and being investigated by. Auto-populated based off the logged-in user.
Originating office	The agency office where the case originated. Auto-populated based off the logged-in user.
Division group	Division group of the agency handling the case.
Case initiated by	Name or type of individual that the case was initiated by.
Supervisory Reviewer	Supervisory Agent assigned to review the case.
Investigative Feasibility	Investigative Feasibility of the case.
Priority	Priority of the case.
Investigation level	Investigation level of the case.

Investigative Case Management Entity Management forms

Use forms to view and update information about entities linked to an investigative case.

ICM Entity Management Person form

The Person form allows you to create a new person entity record within an investigative case, and capture as many identifiable details about the person as possible. The person entity will automatically link to the case, with options to link to another case, or another entity. Not all fields are mandatory, but a minimum amount of information is required for the record to be searchable within ICM.

Entity Management Person form

Fields	Description
Person	Search for an existing record in the master index to auto-fill its information. If the person record has not yet been created, skip this and enter the details manually.
First Name	First Name of the person associated with the case.
Middle Name	Middle Name of the person associated with the case.
Last Name	Last Name of the person associated with the case.
Preferred contact method	Preferred contact method of the person associated with the case.

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Entity Management Person form (continued)

Fields	Description
Phone number	Phone number of the person associated with the case.
E-mail	E-mail of the person associated with the case.
Gender	Gender of the person associated with the case.
Height	Height of the person associated with the case.
Weight	Weight of the person associated with the case.
Ethnicity	Ethnicity of the person associated with the case.
Prefix	Prefix of the person associated with the case.
Date of Birth	Date of Birth of the person associated with the case.
Hair Color	Hair Color of the person associated with the case.
Eye Color	Eye Color of the person associated with the case.
National identifier	SSN, SIN, NIN, or Other.
National identifier Country	Country from which the person's national identifying documents were issued.
Driver's license number	Driver's license number of the person associated with the case.
Driver's license issuing state	State from which the person's driver's license was issued.
Driver's license issuing country	Country from which the person's driver's license was issued.
State/Province identification number	State/Province identification number of the person associated with the case.
Passport number	Passport number of the person associated with the case.
Passport issuing country	Country from which the person's passport was issued.
Additional Information	Any additional information regarding the person
Information Completeness	Not all fields are mandatory, but a minimum amount of information is required for the record to be searchable within ICM. The information completeness field indicates whether or not that minimum requirement is met. Displays as Partial or Complete.
Street	Current street of the person associated with the case.

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Entity Management Person form (continued)

Fields	Description
City	Current city of the person associated with the case.
Zip/Postal Code	current zip/postal Code of the person associated with the case.
Country	Current country of the person associated with the case.
State/Province	Current state/province of the person associated with the case.
Person Type	The type of relationship that the person has to the case. Subject, Victim, Witness, or Other
Source Type	Related case, Investigative task, or Other
Status	The status of the person in relation to the case. For more information on the options for person status, see Person status form.
Willing to Testify?	Whether the person is willing to testify in court.
Relationship description	A brief, written description of the person's relationship to the case.

Person status form

A person associated with an investigative case can be put in one of several statuses based on how they have responded to the case. The following table outlines the statuses that are available for a person entity when adding that person to a case.

Role Type	Status	Description
All	Active	Currently involved in the investigation
All	Non-Responsive	Attempts to contact have failed or party is not replying
All	Uncooperative	Engaged but unwilling to assist
All	Cooperative	Willing to assist or provide information
All	Unavailable	Temporarily unreachable (e.g., hospitalized, deployed)
All	Cleared	Determined not to be relevant or involved
All	Deceased	Confirmed dead; may still be relevant
All	Duplicate	Duplicate entry in the system
All	Unknown	Identity not yet verified
All	Removed	Removed from the case record
All	Pending Review	Awaiting supervisor or legal review
All	Flagged	Flagged for follow-up or special handling
Subject	Suspect	Believed to be involved based on preliminary evidence

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Subject	Person of Interest	Not a suspect, but under consideration
Subject	Charged	Formally charged in the case
Subject	Arrested	Taken into custody
Subject	Convicted	Found guilty via court ruling
Subject	Acquitted	Found not guilty
Subject	Released	Released without charges
Subject	Fugitive	Has an active warrant and is at large
Victim	Reported	Victim report has been filed
Victim	Verified	Identity and victim status confirmed
Victim	Protected	Under special protections (e.g., anonymity, relocation)
Victim	Withdrawn	No longer participating in the case
Witness	Testified	Has provided official testimony
Witness	Withdrew	Withdrew willingness to cooperate
Witness	Recanted	Changed or retracted previous statement
Witness	Anonymous	Identity not disclosed (e.g., tipster or CI)

ICM Entity Management Location form

The Location form allows you to create a new location entity record within an investigative case, and capture as many identifiable details about the location as possible. Not all fields are mandatory, but a minimum amount of information is required for the record to be searchable within ICM.

Entity Management Location form

Location	Search for an existing record in the master index to auto-fill its information. If the desired location record has not yet been created, skip this and enter the details manually.
Name or short description	Name or short description of the location.
Type	Type of location. For a list of provided location types you can select when adding a location entity to an investigative case, see Location types form.
Additional information	Additional information about the location.
Location Format	Whether the location information will be entered as an address or as GPS coordinates.
Source from	Related case, Investigative task, or Other
Information Completeness	Not all fields are mandatory, but a minimum amount of information is required for the record to be searchable within ICM. The information completeness field indicates whether or not that minimum requirement is met. Displays as Partial or Complete.

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Location types form

The following table is a list of all location types provided by default that are available for selection in the location entity dialog.

Location types Form

Location Entity Types
Air, Bus, or Train Terminal
Bank, Savings & Loan, or Financial Institution
Bar, Nightclub
Church, Synagogue, Temple
Commercial, Office Building
Construction Site
Convenience Store
Department, Discount Store
Drug Store, Doctor's Office, Hospital
Field, Woods
Government, Public Building
Grocery, Supermarket
Highway, Road, Alley, Street
Hotel, Motel, Temporary Lodging
Jail, Prison, Penitentiary
Lake, Waterway
Liquor Store
Parking Lot, Garage
Rental Storage Facility
Residence, Home
Restaurant, Cafeteria
School, College, University
Service, Gas Station
Specialty Store (jewelry, electronics, etc.)
Other, Unknown

ICM Entity Management Events form

The Event form allows you to create a new event entity record within an investigative case, and capture as many identifiable details about the event as possible. Not all fields are mandatory, but a minimum amount of information is required for the record to be searchable within ICM.

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Entity Management Events form

Event type	Incident or Investigation
Name or short description	Name or short description of the event
Classification code	Displays only if **Incident** is selected. Pre-configured internal classification code for the type of incident.
Classification code text	Description of the classification code.
Activity type	Displays only if **Investigation** is selected. Type of Event. Can be an Interview, Canvass (Neighborhood or Business), Field Contact / Stop, Evidence Collection, Crime Scene Documentation, Surveillance. Undercover Operation, Arrest, Search, or Other.
Date	The date the event occurred.
Time	The time the event occurred.
Details	Details about the event.
Image	Optional image attachment.

ICM Entity Management Vehicle form

The Vehicle form allows you to create a new vehicle entity record within an investigative case, and capture as many identifiable details about the vehicle as possible. Not all fields are mandatory, but a minimum amount of information is required for the record to be searchable within ICM.

Entity Management Vehicle form

Vehicle	Search for an existing record in the master index to auto-fill its information. If the vehicle record has not yet been created, skip this and enter the details manually.
Short Description	Short Description
License plate number	License plate number
State/Country of Registration	State/Country of Registration of the vehicle.
Make	Make of the vehicle.
Model	Model of the vehicle.
Year	Year of the vehicle.
Color	Color of the vehicle.
VIN	VIN number of the vehicle, if any.
Type/Body Style	Type/Body Style of the vehicle.
Country of Registration	Country the vehicle is registered in.
Status	Status of the vehicle.
Manufacturer Name	Manufacturer of the vehicle.

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Entity Management Vehicle form (continued)

Information Completeness	Not all fields are mandatory, but a minimum amount of information is required for the record to be searchable within ICM. The information completeness field indicates whether or not that minimum requirement is met. Displays as Partial or Complete.
Notes	Any additional information.
Source From	
Relationship Details	A brief description of the vehicle's relationship to the case.

ICM Entity Management Property form

The Property form allows you to create a new property record within an investigative case, and capture as many identifiable details about the property as possible. Not all fields are mandatory, but a minimum amount of information is required for the record to be searchable within ICM.

Entity Management Property form

Property	Search for an existing record in the master index to auto-fill its information. If the property record has not yet been created, skip this and enter the details manually.
Name or short description	Name or short description of the property.
Type	Property type. Firearm, Electronics, Jewelry, Narcotics, Clothing, Tools, Vehicle Parts, Documents, Miscellaneous, Unknown
Make	Make tag on the property, if any.
Model	Model tag on the property, if any.
Manufacturer Name	Manufacturer Name on the property, if any.
Serial Number	Serial number/tag on the property, if any.
Value	Estimated Value (USD or other currency)
Status	Status of the property. Seized, Destroyed, Returned, Stolen, Held for Court, Unknown
Information Completeness	Not all fields are mandatory, but a minimum amount of information is required for the record to be searchable within ICM. The information completeness field indicates whether or not that minimum requirement is met. Displays as Partial or Complete.

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ICM Entity Management Organization form

The Organization form allows you to create a new organization entity record within an investigative case, and capture as many identifiable details about the organization as possible. Not all fields are mandatory, but a minimum amount of information is required for the record to be searchable within ICM.

Entity Management Organization form

Organizations	Search for an existing record in the master index to auto-fill its information. If the organization record has not yet been created, skip this and enter the details manually.
Name	Name of the organization.
Aliases	Any Aliases of the organization.
Type	Type of organization. The provided choice types are: Gang, School, Faith-based Group, Media Organization, Utility Provider, Financial Institution, Medical Facility,Nonprofit, Other.
Industry/Sector	The Industry/Sector the organization operates in. Financial, Healthcare, Education, Government, Technology, Transportation, Legal, Retail, Construction,Other
Street Address	Street Address associated with the organization.
City	City associated with the organization.
State	State associated with the organization.
Zip	Zip code associated with the organization.
Contact Person/Title	Contact Person associated with the organization.
Phone Number	Phone Number associated with the organization.
Status	Status of the organization. Can be Active, Closed, Under Investigation, Victim, Suspect Organization, Third-Party Observer, or Unknown
Notes	Any notes associated with the organization record.
Information Completeness	Not all fields are mandatory, but a minimum amount of information is required for the record to be searchable within ICM. The information completeness field indicates

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Entity Management Organization form (continued)

	whether or not that minimum requirement is met. Displays as Partial or Complete.

ICM Entity Management Firearm form

The Firearm form allows you to create a new firearm entity record within an investigative case, and capture as many identifiable details about the firearm as possible. The firearm entity will automatically link to the case, with options to link the entity to another case, or another entity. Not all fields are mandatory, but a minimum amount of information is required for the record to be searchable within ICM.

Entity Management Firearm form

Firearm	Search for an existing record in the master index to auto-fill its information. If the firearm record has not yet been created, skip this and enter the details manually.
Serial number	Serial number of the firearm.
Alternate serial number	Alternate serial number of the firearm. Used if defaced, partially removed, or re-stamped.
Manufacturer name	Name of the manufacturer
Manufacturer country	Country of the manufacturer
Global gun make code	A unique 3-4 character alphanumeric code assigned to the specific manufacturer.
Model name/number	Firearm model name or number.
Firearm type	The type of firearm. Pistol, Rifle, Shotgun, Revolver, or Machine gun
Action type	A firearm's action type, classified by its operating mechanism. Bolt, Semi-automatic, Pump, Lever, Break
Caliber/Gauge	Diameter of the firearm barrel. 9mm, 22mm, etc.
Marking/Engravings	Description of any markings or engravings on the firearm.
Importer Name	Name of the firearm importer, if imported.
Country of Manufacture	Firearm country of Manufacture.
Year of Manufacture	Firearm year of Manufacture.
Finish/Color	Finish/Color.
Grip/Stock Material	Wood, Polymer, Metal, or Custom.
Barrel Length	Length of firearm barrel in inches.

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Entity Management Firearm form (continued)

Overall Length	Length of firearm in inches.
Magazine Capacity	The number of rounds a firearm's magazine can hold.
Sight Type	Iron, Optic, Night sights, Laser
Modifications/Aftermarket parts	Any modifications or aftermarket parts found on the firearm.
Condition	Condition of the firearm. New, Used, Poor, Damaged
Unique Identifiers	Any unique identifiers found on the firearm.
Status	Status of the firearm in relation to the case. Can be • Active • Recovered • Destroyed • Stolen • Unknown
NIBIN Entry Flag	Whether a piece of ballistic evidence (such as a shell casing or a test-fired bullet) has been reviewed, deemed appropriate, and entered into the NIBIN database. • Yes/No • National Integrated Ballistic Information Network
NIBIN Entry ID	If entered into the National Integrated Ballistic Information Network, NIBIN Entry ID.
Test Fire Result Referencer	Unique ID.
Ballistic Signature ID	Whether any unique, microscopic marks were used to identify the firearm.
Information Completeness	Not all fields are mandatory, but a minimum amount of information is required for the record to be searchable within ICM. The information completeness field indicates whether or not that minimum requirement is met. Displays as Partial or Complete.

Investigative Case Management Evidence Management forms

Use forms to view and update information about evidence linked to an investigative case.

Investigative Case Management Evidence Management Evidence form fields

Use this form when creating a new evidence record within an Investigative Case Management case.

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Evidence Management Evidence form

Fields	Description
Evidence name	Name or short description of evidence
Description	Brief written description of the evidence
State	Action taken on the piece of evidence.
Type	Type of evidence.
Evidence location (Physical)	If physical evidence, the physical location of the evidence.
Evidence location (Digital)	If digital evidence, the digital location of the evidence.
Evidence related notes	Any additional notes about the evidence.
Originating Case	The case that originated this evidence, and the case that the evidence record is linked to.
Originating Case ID	The id of the case that the evidence record is linked to.
Security classification	Determines access to evidence based on user or team role.
Restrict access?	Whether to restrict access to certain roles. Yes/No.
Collection Location	Where the evidence was collected from.
Collected By	The individual who collected the evidence.
Collection Date	The date on which the evidence was collected.
Collection Time	The time in which the evidence was collected.
Source From	Whether the evidence record is from an investigative task, a related case, or other.

Investigative Case Management Evidence Management Entity form

Use this form when linking an existing entity to an evidence record within an Investigative Case Management case.

Evidence entity form fields

Fields	Description
Entity	This field label will display the chosen entity type. Entity types that can be linked to an evidence record include: **Persons**, **Locations**, **Events**, **Vehicles**, **Properties**, **Firearms**, and **Organizations**, and is chosen via the tabs in Evidence Management. Choose an existing entity record from the case(s) linked to this evidence record by entering and selecting it in the field. If the entity you need isn't listed, make sure it has already been created in the Entity tab on the case linked to the evidence. For information on how to create an entity

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Evidence entity form fields (continued)

Fields	Description
	record within a case, see Add entities to an investigative case using Investigative Case Management Entity Management.
Related Case	Displays the related case linked to this entity. In most instances, this will be the case to which you are currently adding (or modifying) an evidence record. If the case you need isn't listed, make sure it's linked to the entity chosen in the field above.
Relationship type	Defines the chosen entity's relationship to the evidence and case. For example, if you are linking a Person to an evidence record, the person may have the following relationship types to the evidence item: • Person(s) linked to evidence • DNA or fingerprint evidence • Witness statements or testimonies
Relationship description	Provides additional details about how the entity is related to the evidence.

Persons

Persons entity Evidence form fields

Fields	Description
Entity	If you've chosen the *Persons* tab in Evidence Management, this field label will display **Persons**. Choose an existing **Person** entity record from the case(s) linked to this evidence record by entering and selecting it in the field. If the person you need isn't listed, make sure an entity record has already been created within the **Persons** entity tab on the open case. For information on how to create an entity record within a case, see Add an associated person to an Investigative caseAdd entities to an investigative case using Investigative Case Management Entity Management.
Related Case	Displays the related case linked to this **Person**. In most instances, this will be the case to which you are currently adding (or modifying) an evidence record. If the case you need isn't listed, make sure it's linked to the person chosen in the field above.

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Persons entity Evidence form fields (continued)

Fields	Description
Relationship type	Defines the entity's relationship to the evidence and case. A **Person** may have the following relationship type to an item of evidence: • Person(s) linked to evidence • DNA or fingerprint evidence • Witness statements or testimonies
Relationship description	Provides additional details about how the **Person** is related to the evidence.

Locations

Persons entity Evidence form fields

Fields	Description
Entity	If you've chosen the *Locations* tab in Evidence Management, this field label will display **Location**. Choose an existing location entity record from the case(s) linked to this evidence record by entering and selecting it in the field. If the location you need isn't listed, make sure an entity record for it has already been created within the *Locations* entity tab on the open case. For information on how to create an entity record within a case using the Entity Management feature, see Add a location to an investigative case.
Related Case	Displays the related case linked to this **Location**. In most instances, this will be the case to which you are currently adding (or modifying) an evidence record. If the case you need isn't listed, make sure it's linked to the location chosen in the field above.
Relationship type	Defines the entity's relationship to the evidence and case. A **Location** may have the following relationship type to an item of evidence: • Crime scene location of evidence • Evidence found or recovered at location • Relation to witnessed event
Relationship description	Provides additional details and description about the **Location**'s relation to the evidence.

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Events

Persons entity Evidence form fields

Fields	Description
Entity	If you've chosen the *Events* tab in Evidence Management, this field label will display **Events**. Choose an existing **Event** entity record from the case(s) linked to this evidence record by entering and selecting it in the field. If the event you need isn't listed, make sure an entity record for it has already been created within the **Events** entity tab on the open case. For information on how to create an entity record within a case using the Entity Management feature, seeAdd an associated event to an investigative case.
Related Case	Displays the related case linked to this **Event**. In most instances, this will be the case to which you are currently adding (or modifying) an evidence record. If the case you need isn't listed, make sure it's linked to the event entity chosen in the field above.
Relationship type	Defines the **Event**'s relationship to the evidence and case. An item of evidence may be: • Evidence found or linked to certain event • Forensic evidence from an event
Relationship description	Provides additional details and description about how the **Event** is related to the evidence.

Vehicles

Persons entity Evidence form fields

Fields	Description
Entity	If you've chosen the *Vehicles* tab in Evidence Management, this field label will display **Vehicles**. Choose an existing **Vehicle** entity record from the case(s) linked to this evidence record by entering and selecting it in the field. If the vehicle you need isn't listed, make sure an entity record for it has already been created within the **Vehicles** entity tab on the open case. For information on how to create an entity record within a case using the Entity Management feature, seeAdd an associated vehicle to an investigative case.

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Persons entity Evidence form fields (continued)

Fields	Description
Related Case	Displays the related case linked to this **Vehicle**. In most instances, this will be the case to which you are currently adding (or modifying) an evidence record. If the case you need isn't listed, make sure it's linked to the vehicle chosen in the field above.
Relationship type	Defines the vehicle's relationship to the evidence and case. An item of evidence may be: • Evidence found or linked to vehicle • Recovered from vehicle • Relation to vehicle-related evidence
Relationship description	Provides additional details and description about the **Vehicle**'s relation to the evidence.

Properties

Properties entity Evidence form fields

Fields	Description
Entity	If you've chosen the **Properties** tab in Evidence Management, this field label will display **Properties**. Choose an existing **Property** entity record from the case(s) linked to this evidence record by entering and selecting it in the field. If the property item you need isn't listed, make sure an entity record for it has already been created within the **Properties** entity tab on the open case. For information on how to create a property entity record within a case using the Entity Management feature, see Add a related property to an investigative case.
Related Case	Displays the related case linked to this **Property**. In most instances, this will be the case to which you are currently adding (or modifying) an evidence record. If the case you need isn't listed, make sure it's linked to the property item chosen in the field above.
Relationship type	Defines the relationship between the evidence, the **Property** entity record, and the case. An item of evidence may be: • Forensic evidence linked to property • Physical evidence tagged or property

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Properties entity Evidence form fields (continued)

Fields	Description
	or have some relation to stolen or recovered property.
Relationship description	Provides additional details and description about the **Property**'s relation to the evidence.

Firearms

Firearms entity Evidence form fields

Fields	Description
Entity	If you've chosen the **Firearms** tab in Evidence Management, this field label will display **Firearms**. Choose an existing **Firearm** entity record from the case(s) linked to this evidence record by entering and selecting it in the field. If the firearm you need isn't listed, make sure an entity record for it has already been created within the **Firearms** tab on the open case. For information on how to create an entity record within a case using the Entity Management feature, seeAdd an associated firearm to an investigative case.
Related Case	Displays the related case linked to this **Firearm**. In most instances, this will be the case to which you are currently adding (or modifying) an evidence record. If the case you need isn't listed, make sure it's linked to the firearm chosen in the field above.
Relationship type	Defines the relationship between the evidence, the **Firearm** entity record, and the case. An firearm-related piece of evidence may be: • Ballistics evidence linked to firearm • DNA or fingerprint evidence found • Firearm as primary evidence item • Firearm-related documentation
Relationship description	Provides additional details and description about the **Firearm**'s relation to the evidence.

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Organizations

Organizations entity Evidence form fields

Fields	Description
Entity	If you've chosen the **Organizations** tab in Evidence Management, this field label will display **Organizations**. Choose an existing **Organization** entity record from the case(s) linked to this evidence record by entering and selecting it in the field. If the organization you need isn't listed, make sure an entity record for it has already been created within the **Organization** entity tab on the open case. For information on how to create an entity record within a case using the Entity Management feature, see Add an associated organization to an investigative case.
Related Case	Displays the related case linked to this **Organization**. In most instances, this will be the case to which you are currently adding (or modifying) an evidence record. If the case you need isn't listed, make sure it's linked to the organization chosen in the field above.
Relationship type	Defines the relationship between the evidence, the **Organization** entity record, and the case. The evidence item in question may be: • Evidence found on organization premises • Found in relation to corporate or financial evidence
Relationship description	Provides additional details and description about the **Organization**'s relation to the evidence.

Public Sector Digital Services GOV.UK Developer Toolkit reference

Reference tables and forms for configuring and using GOV.UK Developer Toolkit capabilities.

Related topics

GOV.UK Design System Service Portal Widget Library

GOV.UK Design System Service Portal Widget Library

Configurable Portal widgets provide you with the ability to configure the behavior, content, and layout of the GDS Service Portal by configuring widget settings and instance options.

Service Portal uses widgets for configuration. When you configure a page or a widget for a portal on the Service Portal Configuration page, you use Service Portal widgets to do so. The following is a list of base-system widgets that are included with the toolkit that enable you to configure various pages within the GDS Service Portal, and their instance options.

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You can use these widgets as is, or you can duplicate and edit them to suit your needs. For information on how to clone and edit a default GDS Service Portal widget, see Customize Widgets for GOV.UK Design System Service Portal pages.

For more information on using configurable widgets in portals, see Using portal widgets.

Note: To learn more about cloning or creating widgets, see Developing custom widgets.

There are five main categories of widgets available for use with the GDS Service Portal.

Service Catalog widgets

Service Catalog widgets let you browse, request, and track services directly from the Service Portal. They provide the building blocks for a complete Service Catalog experience, allowing you to find what you need and submit requests in one central place.

Use Service Catalog widgets to do the following:

- Browse available services and catalog items.
- Search the catalog from the portal homepage.
- View services by category.
- Order catalog items and submit requests.
- Track your requests and approvals.

These widgets display service information in a clear, task-focused way. For example, some widgets help you search or browse the catalog, while others let you view request details or check the status of items you have already ordered. For more information, see .

Knowledge Management widgets

Knowledge Management widgets let you search, browse, and read knowledge articles directly in the GDS Service Portal, so you can find answers to their questions and learn how to use services without contacting support. These widgets provide the core components for building a knowledge experience that helps you find answers quickly and consistently. For more information on creating and maintaining the articles that are shown on the Knowledge Management widgets, see

Use Knowledge Management widgets to do the following:

- Search the knowledge base for information and solutions.
- Browse knowledge bases and categories.
- View knowledge articles and related content.
- See popular, featured, or top-rated articles.
- Interact with articles by rating or commenting, when available.

These widgets organize knowledge content in a clear and easy-to-navigate way. Some widgets help you discover articles through search and filters, while others display article details and related information on the article page. For more information, see .

Service Portal configuration page widgets

Service Portal configuration page widgets help you set up and manage your Service Portal experience. Use these widgets when you configure portals, pages, themes, and widgets in the Service Portal Configuration workspace, rather than for end-user interaction.

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Configuration page widgets are included as part of the Service Portal Configuration Pages plugin [com.glide.service-portal.config], which is activated automatically when you activate the Service Portal for Enterprise Service Management plugin [com.glide.service-portal.esm].

These widgets support portal configuration tasks such as:

- Navigating Service Portal configuration pages.
- Viewing portals and pages in a structured, tree-based layout.
- Editing portal themes and previewing design changes.
- Configuring pages and widgets using visual editors.

Service Portal configuration page widgets run behind the scenes and are internal to the configuration experience. For example, they power tools like the Portal Map, Page Map, Branding Editor, and Widget Editor, helping you understand and manage how your portal is structured and displayed. For more information, see .

Service Portal Header and Footer page widgets

Service Portal configuration page widgets help you set up and manage your Service Portal experience. Use these widgets when you configure portals, pages, themes, and widgets in the Service Portal Configuration workspace, rather than for end-user interaction.

These widgets support portal configuration tasks such as:

- Navigating Service Portal configuration pages.
- Viewing portals and pages in a structured, tree-based layout.
- Editing portal themes and previewing design changes.
- Configuring pages and widgets using visual editors.

Service Portal configuration page widgets run behind the scenes and are internal to the configuration experience. For example, they power tools like the Portal Map, Page Map, Branding Editor, and Widget Editor, helping you understand and manage how your portal is structured and displayed. For more information, see .

Search widgets

Service Portal search widgets let you find information quickly across the Service Portal. Use these widgets to search for knowledge articles, catalog items, records, and other content without navigating through multiple pages.

Search widgets help you to do the following:

- Search for answers, services, and records from a single search bar.
- See relevant results as you type with predictive search.
- Filter and refine search results to find what you need faster.
- Get suggested or context-aware results while submitting requests.

Service Portal search widgets work in different locations, such as the portal homepage, search results page, or within record producers. Some widgets display a simple search bar, while others show detailed results with filters and facets for easier discovery. For more information, see .

Widgets and Widget Instances

Each widget added to a page becomes its own instance. Because widgets are reusable and can appear on different pages to allow the user to do different things, the application of a widget on a

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page is referred to as a Widget Instance. The page loads with content represented by instances of a widget specific to that page.

Widget instances get their logic from the base widget template, client scripts, server scripts, and depending on the widget, CSS.

You can have several instances of the same widget on a page, and each instance of the widget you configure remains unique. For example, each instance of a Knowledge widget on a page could map to a different knowledge base, or be organized in a different way.

Adding a widget to a page creates a new Widget Instance, as well as a record on the Widget Instances [sp_instance] table with the following information:

- A reference to the widget
- A reference to the column of the page where the widget is located
- The configuration for a widget in the form of pre-defined form fields and an **Additional Options** field in JSON format

You can use widget instances to configure the location, properties, and CSS specific to that instance of the widget.

For more information on configuring widget instances, see Configure Widgets Instance Options for GOV.UK Design System Service Portal pages.

ServiceNow Otto for Public Sector Digital Services (PSDS)

With the ServiceNow Otto for Public Sector Digital Services (PSDS) application, your agents can use generative AI to summarize the details and comment activity of each public service case to get the context of the case.

Get started

Explore	Configure	Use
		
Learn more about ServiceNow Otto for Public Sector Digital Services (PSDS)	Configure the ServiceNow Otto for Public Sector Digital Services (PSDS) application.	Use generative AI capabilities offered by ServiceNow Otto for Public Sector Digital Services (PSDS).

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	Use Public Sector Digital Services AI agent collection  Use agentic workflows in Public Sector Digital Services.	

Important:

- Not all model providers are available for customers with in-country SKUs, and some AI products/features are currently unavailable for in-country customers. For more information, see the KB1584492 article in the Now Support Knowledge Base. Be sure to check for model provider availability updates in future releases.
- Some AI products/features are currently unavailable for customers in the FedRAMP, NSC DOD IL5, or Australia IRAP-Protected data centers, self-hosted customers, or in other restricted environments. For more information, see the KB0743854 article in the Now Support Knowledge Base. Be sure to check for availability updates in future releases.
- Some AI products/features are currently available only for customers in some regions. Be sure to check for availability updates in future releases.
- Some AI products and skills are not available in Regulated Markets. For more information, see KB2593939: Regulated Markets AI Products/Skills Not Available. Be sure to check for availability updates in future releases.

Troubleshoot and get help

- ServiceNow Community AI & Intelligence
- Search the Known Error Portal for known error articles
- Contact Customer Service and Support

AI limitations

This application uses artificial intelligence (AI) and machine learning, which are rapidly evolving fields of study that generate predictions based on patterns in data. As a result, this application may not always produce accurate, complete, or appropriate information. Furthermore, there is no guarantee that this application has been fully trained or tested for your use case. To mitigate these issues, it is your responsibility to test and evaluate your use of this application for accuracy, harm, and appropriateness for your use case, employ human oversight of output, and refrain from relying solely on AI-generated outputs for decision-making purposes. This is especially important if you choose to deploy this application in areas with consequential impacts such as healthcare, finance, legal, employment, security, or infrastructure. You agree to abide by ServiceNow's AI Acceptable Use Policy, which may be updated by ServiceNow.

Data processing

This application requires data to be transferred from ServiceNow customers' individual instances to a centralized ServiceNow environment, which may be located in a different data center region from the one where your instance is, and potentially to a third-party cloud provider, such as Microsoft Azure. This data is handled per ServiceNow's internal policies and procedures, including our policies available through our CORE Compliance Portal.

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Data collection

ServiceNow collects and uses the inputs, outputs, and edits to outputs of this application to develop and improve ServiceNow technologies including ServiceNow models and AI products. In addition, this application will collect case information (for case summarization) and test run information (for test summarization).

Customers can opt out of future data collection at any time, as described in the Now Assist Opt-Out page.

For more information, see the Now Assist documentation.

Exploring ServiceNow Otto for Public Sector Digital Services (PSDS)

With the ServiceNow Otto for Public Sector Digital Services (PSDS) application, your agents can use AI capabilities to perform various tasks on a government service case.

Important: Some AI products/features are currently available only for customers in some regions. Be sure to check for availability updates in future releases.

Features

Note: Depending on your license, you will have access to certain application features, generative AI skills, agentic workflows, and AI agents. For more information, see ServiceNow product tiers.

The ServiceNow Otto for PSDS application includes the following AI features that enable your agents to work through cases.

Investigative case summarization skill

Synthesizes case narratives, entities, evidence, and activity into a structured summary, enabling agents to grasp case context and respond to inquiries. Generates detailed resolution information for investigative outcomes, allowing agents to propose solutions and integrate generated information into the case record.

Investigative case narrative refinement (via ServiceNow Otto Context Menu)

Reviews text and surfaces gaps, inconsistencies, and tone issues before a case narrative is submitted for supervisory review. Delivers real-time refinement suggestions grounded in linked entities, evidence, and case activity, leaving investigators with full control over accepting, rejecting, or editing every suggestion.

Document screening skill

Review and validate uploaded documents autonomously, checking IDs, tax forms, and other supporting documents. This skill flags potential issues and surfaces key details, applying consistent validation logic across every submission.

Government case summarization skill

Condenses comprehensive case records into concise summaries, including the issue and the actions taken, enabling agents to grasp case contexts and respond effectively to inquiries. Generates detailed resolution information for specific government case types, allowing agents to propose solutions to constituents or business contacts and integrate this information into the case record.

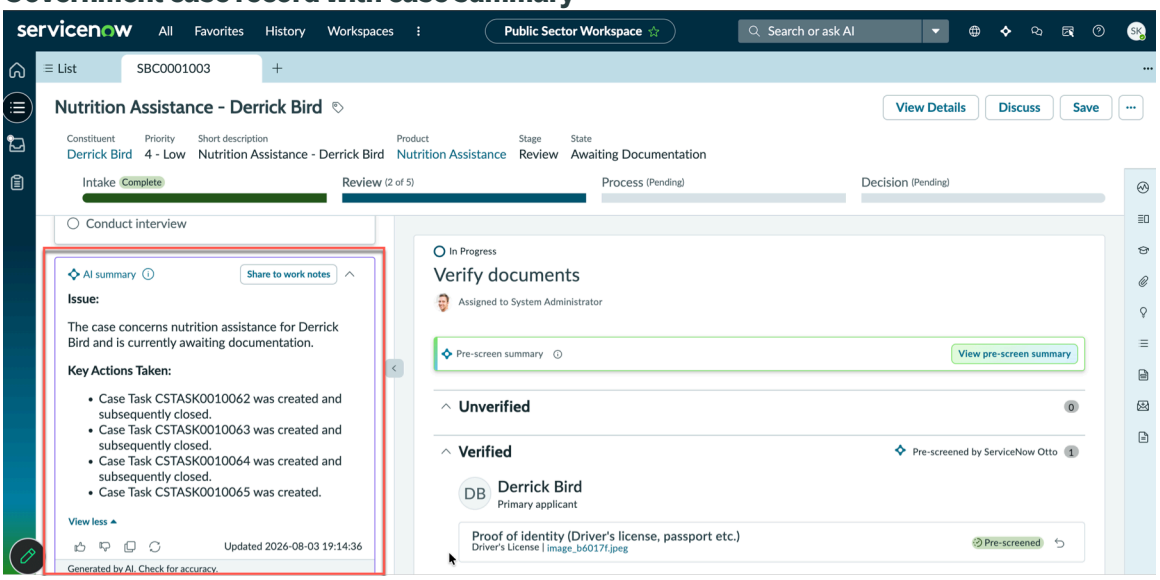
The case summarization skill generates a case summary and displays it above the activity stream. The summary includes the information that the agent enters in the following case record fields:

- Short description
- Description

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- Work notes
- Additional comments
- Email
- Service level agreement (SLA)

Government case record with case summary



Chat summarization skill

Automatically generate summaries of agent-facing chats. The summaries capture the context of conversations between agents and constituents or virtual agents at different points of the handoff. For example, summaries are generated when a Virtual Agent chat history is handed off to a live agent. Summaries are also generated when one live agent hands off a chat history with a customer to another live agent. Critical information from interactions is readily accessible for future reference and action.

ServiceNow Otto for AI Search

use single-turn capabilities for legislation and policy summarization, providing agents with succinct overviews of complex documents and enhancing the ability to navigate and comprehend extensive legislative materials. This skill provides actionable AI-generated or AI-selected answers in searches, synthesizing and summarizing information from multiple knowledge bases to deliver relevant answers in a conversational format.

Fee waiver AI Agent skill

Determines the fee breakdown for an information request. The skill provides a subtotal fee estimate and a recommendation for whether a fee waiver request should be approved or rejected, including reasons for any rejection. It also provides a total fee estimate with the fee waiver, if applicable. This skill works via the Information Request Fee Estimation AI Agent to provide an autonomous decision based on guidelines added in a specific knowledge article. For information on standalone AI agents in Public Sector, see .

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Important:

- Not all model providers are available for customers with in-country SKUs, and some AI products/features are currently unavailable for in-country customers. For more information, see the KB1584492 article in the Now Support Knowledge Base. Be sure to check for model provider availability updates in future releases.
- Some AI products/features are currently unavailable for customers in the FedRAMP, NSC DOD IL5, or Australia IRAP-Protected data centers, self-hosted customers, or in other restricted environments. For more information, see the KB0743854 article in the Now Support Knowledge Base. Be sure to check for availability updates in future releases.
- Some AI products/features are currently available only for customers in some regions. Be sure to check for availability updates in future releases.
- Some AI products and skills are not available in Regulated Markets. For more information, see KB2593939: Regulated Markets AI Products/Skills Not Available. Be sure to check for availability updates in future releases.

Tiers

The ServiceNow AI Platform now brings you a new AI experience with three licensing tiers available:

- Foundation: AI basics to deliver insights
- Advanced: AI to boost productivity across relevant use cases
- Prime: Act autonomously with all AI assets, and create your own

For more information, see ServiceNow product tiers.

For information about AI assets that are available on the ServiceNow AI Platform, see the following topics:

- Generative AI skills
- Agentic workflows

ServiceNow Otto panel in CRM Workspace

An agent can use the ServiceNow Otto panel in CRM Workspace. This conversational interface enables an agent to request a case summary and generate the case resolution notes. For more information about the ServiceNow Otto panel, see ServiceNow Otto panel.

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Important: Some generative AI skills, agents, and agentic workflows are turned on by default. The default behavior works as follows:

New customers

When you install an AI product, designated generative AI skills, AI agents, or agentic workflows are turned on automatically.

Existing customers who are upgrading (starting with Zurich Patch 4)

There is no change to skills, agents, or agentic workflows that are currently enabled and customized.

An AI asset is turned on if:

- The AI plugin is installed, but the asset was never turned on.
- An admin has never adjusted roles for the skill.

An AI asset is not turned on if:

- The asset was previously turned on, and then turned off again.
- An admin has adjusted roles for the asset.

For more information, see AI agents, skills, and agentic workflows on by default.

ServiceNow Otto in AI Search

The ServiceNow Otto in AI Search application uses Now LLM Service to extract actionable Q&A Genius Result answers from the knowledge articles that are found in Service Portal, Virtual Agent, Employee Center, and global searches. By using this application, an agent can improve the customer's experience by retrieving the relevant content from the knowledge base and generating concise answers. For more information, see ServiceNow Otto for AI Search.

Sensitive data handling

Personally identifiable information and other sensitive data is masked so that it does not appear in generative AI prompts. Placeholder text is sent with the prompt instead, and that placeholder text is replaced with the original text after the response has been received. This two-way masking ensures that your users see the correct values, but the Now LLM Service is not exposed to any sensitive information. For more information, see Multi-turn catalog ordering.

Troubleshoot and get help

- ServiceNow Community on AI and Intelligence
- Search the Known Error Portal for known error articles
- Contact Customer Service and Support

AI limitations

This application uses artificial intelligence (AI) and machine learning, which are rapidly evolving fields of study that generate predictions based on patterns in data. As a result, this application may not always produce accurate, complete, or appropriate information. Furthermore, there is no guarantee that this application has been fully trained or tested for your use case. To mitigate these issues, it is your responsibility to test and evaluate your use of this application for accuracy, harm, and appropriateness for your use case, employ human oversight of output, and refrain from relying solely on AI-generated outputs for decision-making purposes. This is especially important if you choose to deploy this application in areas with consequential impacts such as healthcare, finance, legal, employment, security, or infrastructure. You agree to abide by ServiceNow's AI Acceptable Use Policy, which may be updated by ServiceNow.

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Data processing

This application requires data to be transferred from ServiceNow customers' individual instances to a centralized ServiceNow environment, which may be located in a different data center region from the one where your instance is, and potentially to a third-party cloud provider, such as Microsoft Azure. This data is handled per ServiceNow's internal policies and procedures, including our policies available through our CORE Compliance Portal.

Data collection

ServiceNow collects and uses the inputs, outputs, and edits to outputs of this application to develop and improve ServiceNow technologies including ServiceNow models and AI products. In addition, this application will collect case information (for case summarization). Customers can opt out of future data collection at any time, as described in the Now Assist Opt-Out page.

For more information, see the Now Assist documentation.

Related topics

- AI Admin Hub
- Configure ServiceNow Otto for Public Sector Digital Services (PSDS)
- Using generative AI with ServiceNow Otto for Public Sector Digital Services (PSDS)
- Exploring AI Admin Hub

Exploring generative AI skills in ServiceNow Otto for Public Sector Digital Services (PSDS)

With the ServiceNow Otto for Public Sector Digital Services (PSDS) application, your agents can use generative AI skills to perform various tasks on a government service case.

Skills

The ServiceNow Otto for PSDS application includes the generative AI skills that enable your agents to understand the case context so that they can propose resolutions to the constituent or approve an application faster.

Investigative case summarization skill

Synthesizes case narratives, entities, evidence, and activity into a structured summary, enabling agents to grasp case context and respond to inquiries. Generates detailed resolution information for investigative outcomes, allowing agents to propose solutions and integrate generated information into the case record.

Investigative case narrative refinement (via ServiceNow Otto Context Menu)

Reviews text and surfaces gaps, inconsistencies, and tone issues before a case narrative is submitted for supervisory review. Delivers real-time refinement suggestions grounded in linked entities, evidence, and case activity, leaving investigators with full control over accepting, rejecting, or editing every suggestion.

Document screening skill

Review and validate uploaded documents autonomously, checking IDs, tax forms, and other supporting documents. This skill flags potential issues and surfaces key details, applying consistent validation logic across every submission.

Government case summarization skill

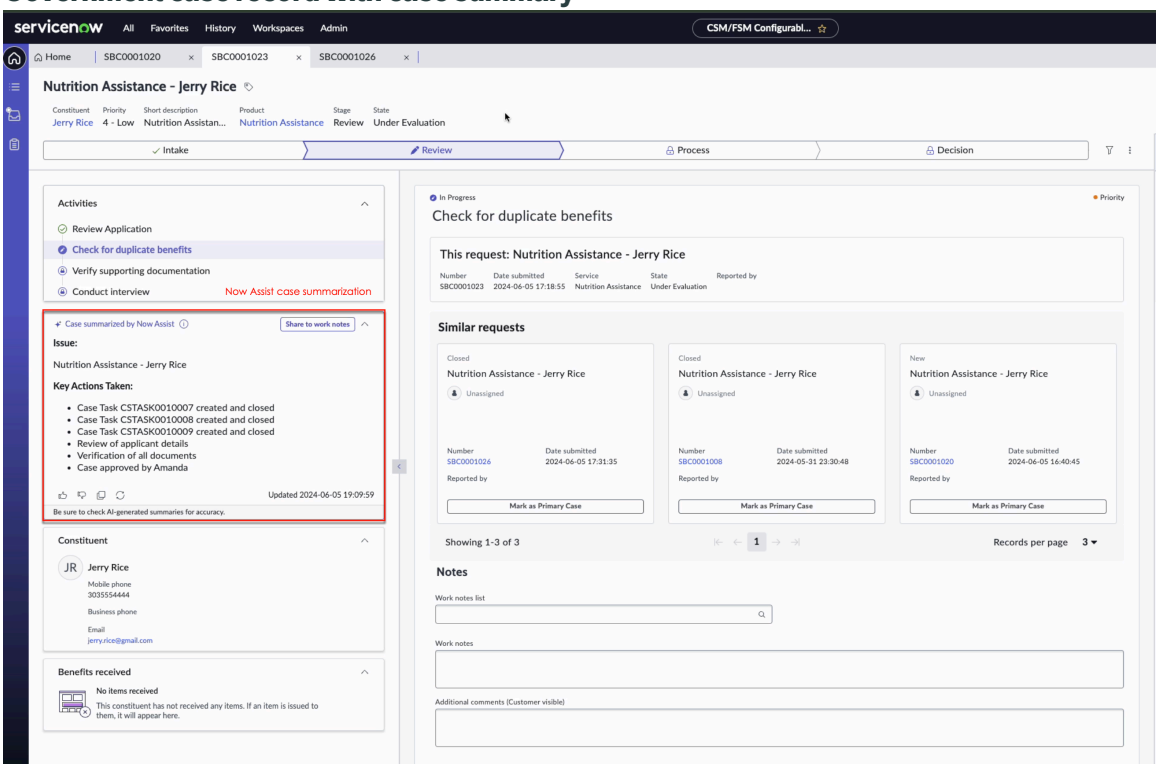
Condenses comprehensive case records into concise summaries, including the issue and the actions taken, enabling agents to grasp case contexts and respond effectively to inquiries. Generates detailed resolution information for specific government case types, allowing agents to propose solutions to constituents or business contacts and integrate this information into the case record.

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The case summarization skill generates a case summary and displays it above the activity stream. The summary includes the information that the agent enters in the following case record fields:

- Short description
- Description
- Work notes
- Additional comments
- Email
- Service level agreement (SLA)

Government case record with case summary



Chat summarization skill

Automatically generate summaries of agent-facing chats, capturing the context of conversations between agents and constituents or virtual agents at different points of the handoff, such as when a Virtual Agent chat history is handed off to a live agent, or when one live agent hands off a chat history with a customer to another live agent. This functionality enables critical information from interactions to be readily accessible for future reference and action.

ServiceNow Otto for AI Search

Leverage single-turn capabilities for legislation and policy summarization, providing agents with succinct overviews of complex documents and enhancing the ability to navigate and comprehend extensive legislative materials. This skill provides actionable AI-generated or AI-selected answers in searches, synthesizing and summarizing information from multiple knowledge bases to deliver relevant answers in a conversational format.

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Document Screening AI Skill for Public Sector Digital Services

Document Screening AI Skill is an AI-powered capability built on ServiceNow Otto for Document Intelligence and available through ServiceNow Otto for PSDS.

It automatically analyzes documents uploaded by applicants and identifies the type or category of each document (for example, driver's license, passport, budget, or narrative). It validates whether the uploaded document matches what was requested in an application checklist. If there is a mismatch, the agent flags it and helps government employees generate AI-assisted messages requesting corrected documentation.

This AI skill uses AI to screen documents and ensure they match what the applicant was required to submit. Instead of waiting for a human to discover an issue later in the process, the system identifies problems immediately and helps resolve them faster.

1. When an applicant uploads a document, the Document Screening Skill automatically analyzes the content of that file. It determines what type of document it is—for example, a driver's license, a passport, a budget document, or a narrative attachment. These document types are configurable, so agencies can define what categories matter to their specific programs.
2. Once the document type is detected, the Document Screening Skill compares it against the expected document type for that step in the application.
3. If everything matches, the document is marked as valid.
4. If it doesn't—say a driver's license was required but a different file was uploaded—the Document Screening Skill flags the document, explains why, and recommends a corrective action. The results are surfaced directly in the user interface, next to each uploaded document. Agents can immediately see which files are valid for the selected document type, which ones aren't, and why. They can also confirm or dispute the AI's classification if needed. When a document is flagged, agents can use AI assistance to quickly draft a message back to the applicant requesting the correct documentation. One important clarification: this agent does not validate the accuracy of the information inside the document. It does not verify identity or check data correctness. Its role is focused and intentional. It screens documents and ensures the right document types are submitted. The Document Screening Skill takes one of the most time-consuming steps in public sector case work. It makes it faster, smarter, and more accurate —improving outcomes for agencies, agents, and constituents alike.

The Document Screening Skill uses AI-driven document intelligence. Key capabilities include:

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- Document Category Detection: The AI analyzes document content to determine its type (e.g., ID, passport, budget, narrative).
- Validation Against Expected Category: It compares the detected category with what the applicant was required to submit.
- Error Notification & Recommendations: If the document does not match expectations, the AI agent flags it, explains why, and recommends corrective action.
- UI Integration: Validation results are displayed directly next to each uploaded document, allowing human agents to confirm or dispute the classification.
- AI-Assisted Message Composition: Agents can quickly generate messages requesting corrected documents, which are reprocessed automatically on re-upload.

For more information on Document Intelligence, see .

The Document Screening Skill delivers measurable value across agencies:

- Reduced manual effort by eliminating repetitive document checks
- Faster application processing and reduced case backlogs
- Improved accuracy and consistency in document validation
- Lower operational risk from missed or incorrect documentation
- Higher agent productivity, allowing staff to focus on complex case work

The primary users are government employees and case workers, including:

- Social benefits administrators
- Grants management officers
- Public sector intake and eligibility review teams
- Information request processing staff

There are 6 stages of Document Verifications

- Unverified : When the document is uploaded or manually undo by Human Agent
- Verified : Manually Verified by Human Agent
- Flagged : Manually Flagged by Human Agent
- Pre-Verified - Verified by AI
- Pre-Flagged : Flagged by AI
- Screening failed by AI : System unable to process documents

For more information on how to activate and customize (what) of the Document screening skill, see Activate the Document screening AI skill in ServiceNow Otto for PSDS.

Chat summarization in ServiceNow Otto for Public Sector Digital Services (PSDS)

Use the chat summarization feature in ServiceNow Otto for Public Sector Digital Services (PSDS) to automatically generate summaries of chat conversations in Virtual Agent. The chat summary enables an agent to quickly gain an understanding of the interaction without reading the entire transcript. This saves your requester from having to repeat information they provided to the Virtual Agent.

The chat summarization skill generates a condensed version of the conversation between live agents or between a requester and Virtual Agent. A chat summarization is auto-generated when:

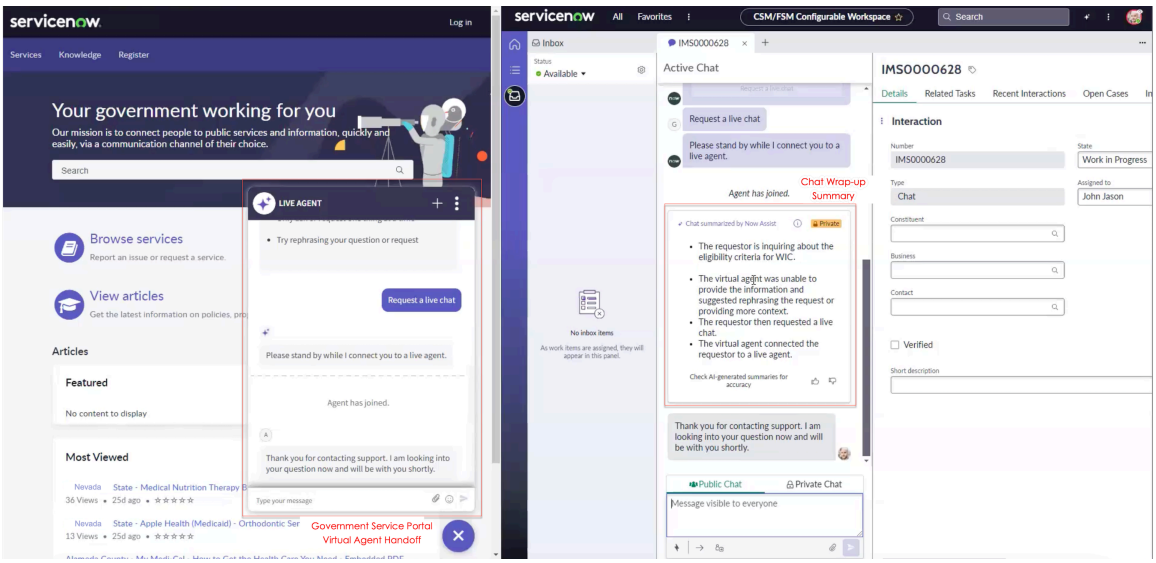
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- The conversation ends
- The agent uses the `/summarize` quick action in Agent Chat
- The user selects **Chat Summarization** or enters `summarize chat` in the **Ask Otto** field on the ServiceNow Otto panel
- An interaction is transferred from Virtual Agent to a live agent and the conversation is at least six lines long. The chat summarization displays in a summary card in the conversation.

In the playbook Interaction record, Chat Summary and Short Description fields are automatically generated after chat has ended. A blue box indicates that ServiceNow Otto for Public Sector Digital Services (PSDS) has modified the field value. When the system generates a summary and automatically populates the **Chat summary** field, it displays an AI icon above the field. The icon indicates that the summary is generated by AI. A banner displays at the top of the Interaction record. The message in the banner advises the agent to verify the summary for accuracy and update the information if it is not accurate.

When a chat summary is generated, it is automatically added to the **Chat summary** field on the Interaction record. An agent can modify and save the information in the **Chat summary** field.

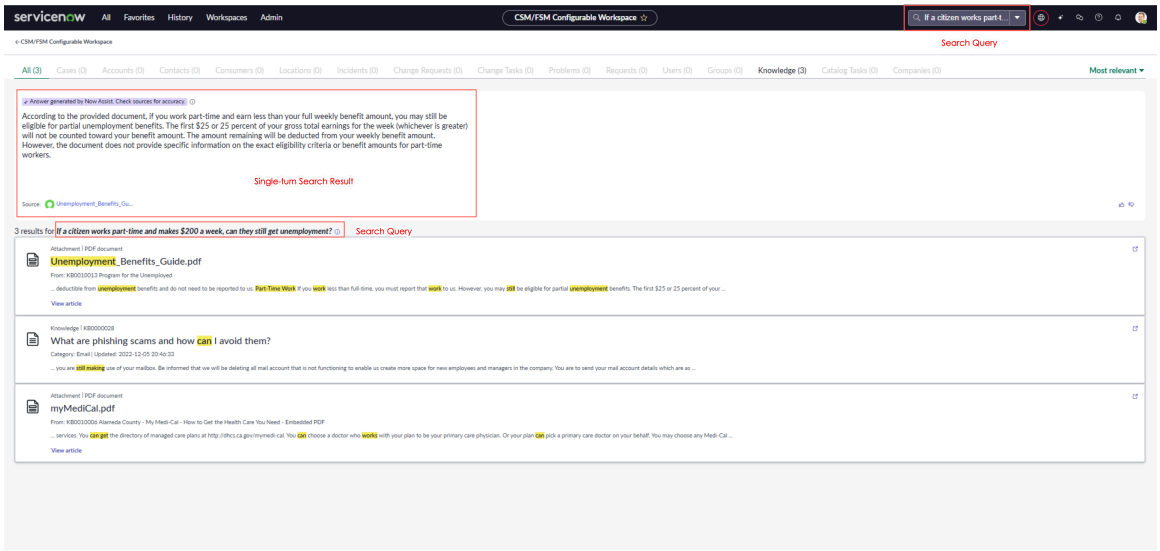
Chat summarization in ServiceNow Otto for PSDS



AI Search for ServiceNow Otto for Public Sector Digital Services (PSDS)

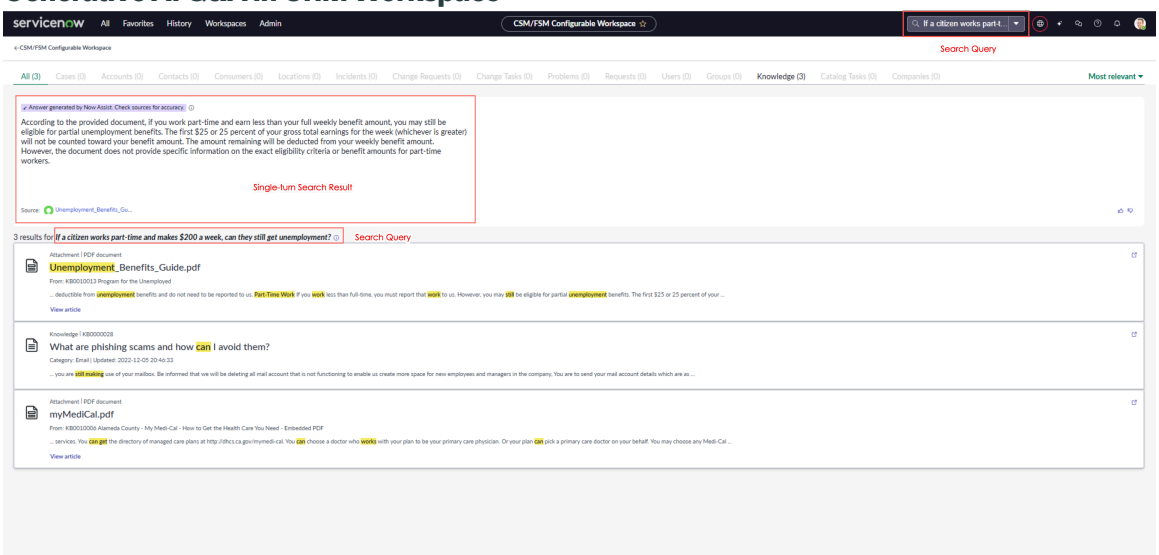
The AI Search index stores data from Platform records, Knowledge Base articles, or external sources, and makes that data available for agents to search in the CRM Workspace. An admin can configure where the data is pulled from. Search query features use ServiceNow AI Platform technologies to improve the search user experience.

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Watch this video to see how Public Sector Digital Services agents can find answers using AI Search. For information on AI Search see AI Search.

Generative AI Q&A in CRM Workspace



Configure ServiceNow Otto for Public Sector Digital Services (PSDS)

If you have the admin role, you can configure the ServiceNow Otto for Public Sector Digital Services (PSDS) application so that your agents and managers can use the generative-AI skills in CRM Workspace and in Core UI.

Use the AI Admin Hub console to configure ServiceNow Otto for Public Sector Digital Services (PSDS). This console contains everything that you need to install the available ServiceNow Otto plugins and configure generative AI skills. For additional information, see Overview tab in AI Admin Hub.

The following table lists the features and skills that are available for use with ServiceNow Otto for Public Sector Digital Services (PSDS) and are accessible through the AI Admin Hub console.

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Features and skills available for activation in the AI Admin Hub console

Available Features	Skills
Document	Document screening
Chat	• Chat summarization • Chat recommendation • Sidebar recommendation
Case	• Investigative case summarization • Government case summarization
Search	• Legislation summarization • Search summarization • Extract Q&A answers from knowledge base articles upon search

Note:

Now LLM Service is currently the only provider for this application's skills.

Install ServiceNow Otto for Public Sector Digital Services (PSDS)

Install required plugins and enable ServiceNow Otto for Public Sector Digital Services (PSDS) to configure and use generative AI skills in Configurable Workspace, Playbooks, and Core UI.

Before you begin

Role required: admin

The following plug-ins and store apps are required for use of ServiceNow Otto for Public Sector Digital Services (PSDS) and its features, such as AI Search and summarization skills:

- AI Admin Hub Console
- ServiceNow Otto for Public Sector Digital Services (PSDS) (sn_psds_gen_ai)
- ServiceNow Otto for Customer Service Management (CSM) (sn_csm_gen_ai)
- Glide Virtual Agent (com.glide.cs.chatbot)
- Glide Conversation Generative AI (com.glide.cs.genai)

About this task

Note:

Now LLM Service is currently the only provider for this application's skills.

To get started with ServiceNow Otto, you must install at least one ServiceNow Otto application on your instance. The AI Admin Hub can guide your implementation, starting with installation. Use the AI Admin Hub console to configure ServiceNow Otto for Public Sector Digital Services (PSDS). This console contains everything that you must install the plugins and configure the generative AI skills. For additional information, see Overview tab in AI Admin Hub, and the ServiceNow Otto Journey Checklist.

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For information about CRM Workspace, see Set up CRM Workspace. For information about AI agents, see Install AI Agents.

To access AI agents in the ServiceNow Otto panel, you must turn on the ServiceNow Otto panel and ensure that case summarization is active.

To install the ServiceNow Otto for PSDS plugin (sn_psds_gen_ai), follow the procedure:

Procedure

1. Install the ServiceNow Otto for Public Sector Digital Services (PSDS) plugin (com.sn_psds_gen_ai).
2. Navigate to **All** > *AI Admin Hub* > **Settings**.

   If you're already in AI Admin Hub, select the **Settings** tab.
3. On the **Settings** page, select **Plugins**.

   Plugins appear as cards. Review all ServiceNow Otto plugins on the **Available for you** tab. Plugins that you have already installed appear on the **Installed** tab.
4. Select **Get plugins** on the ServiceNow Otto for Customer Service Management (CSM) and ServiceNow Otto for Public Sector Digital Services (PSDS) cards.
5. In the confirmation window, select **Install Plugin** to open the ServiceNow Store page for the plugin in a new browser tab.
6. Install the plugin from the ServiceNow Store page.

   Some applications may require you to request the app from the ServiceNow® Store first. After you've requested the application from the ServiceNow® Store page, navigate to **All** > **System Applications** > **All Available Applications** > **All** to finish the installation.
7. Return to the AI Admin Hub console.
8. In the dialog box, select **Refresh**.

   For more detailed information about the installation process, see Install plugins for ServiceNow Otto.

Result

Your AI Admin Hub console is successfully configured with the necessary plug-ins. Select **View all (Plugin) Assists and Skills** to review the features of your new plugin, or close the dialog box to return to the AI Admin Hub console.

What to do next

Activate the ServiceNow Otto panel standard chat or Activate a ServiceNow Otto Skill.

Configure a skill in ServiceNow Otto for Public Sector Digital Services (PSDS)

Configure the triggers, settings, and display locations for ServiceNow Otto skills to enable GenAI capabilities across the Public Sector Digital Services agent platform.

About this task

Each skill is configured separately, and tailored to support agents across various platforms. The following AI skills are available to be configured for use within Public Sector Digital Services:

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AI skill overviews

Skill	Description
Document screening	Review and validate uploaded documents autonomo checking IDs, tax forms, and other supporting documents. This skill flags potential issues and surfa key details, applying consistent validation logic across every submission. For more info, see Configur Document screening.
Investigative case summarization	Synthesize narratives, entities, evidence, and activity into a structured summary, enabling agents to grasp contexts and respond to inquiries. Generate detailed resolution information for investigative outcomes, allowing agents to propose solutions and integrate generated information into the case record. For more info, see Configure Investigative case summarization
Government case summarization	Summarize the case details and display this informat on the case record, helping agents to grasp the conte of a case. For more information, see Configure Case summarization.
Chat summarization	Auto-generate summaries of agent-facing chats. Summaries capture the essence of conversations between agents and constituents or virtual agents, highlighting key points. Critical information from interactions is readily accessible for future reference and actions. For more information, see Configure Cha summarization.

The AI Admin Hub console contains everything that you need to install the plugins and configure the generative AI skills. For additional information, see Overview tab in AI Admin Hub

General Configuration Steps

The AI Admin Hub console contains everything that you need to install the plugins and configure generative AI skills. For additional information, see Overview tab in AI Admin Hub.

Each skill has its own configuration process. However, skill activation follows the same guided setup. What configuring steps are required varies depending on the skill.

Common Configuration components:

- **Trigger**: Allows you to configure the circumstances in which a skill is generated. For example, chat summarizations can be configured to generate when the chat handoff is done from a live agent to a live agent.
- **Input**: Configure the data used to create the information generated by the skill.
- **Availability**: customize how and when the skill capability is active and accessible.
- **Access**:determine who can access this skill. By selecting specific roles, you're controlling who can use it. The roles you choose will also be available in the next step, **Select display**.
- **Display:** determine where the skill appears. For example, the case summarization skill can be configured to display on forms and workspaces or in the ServiceNow Otto panel.

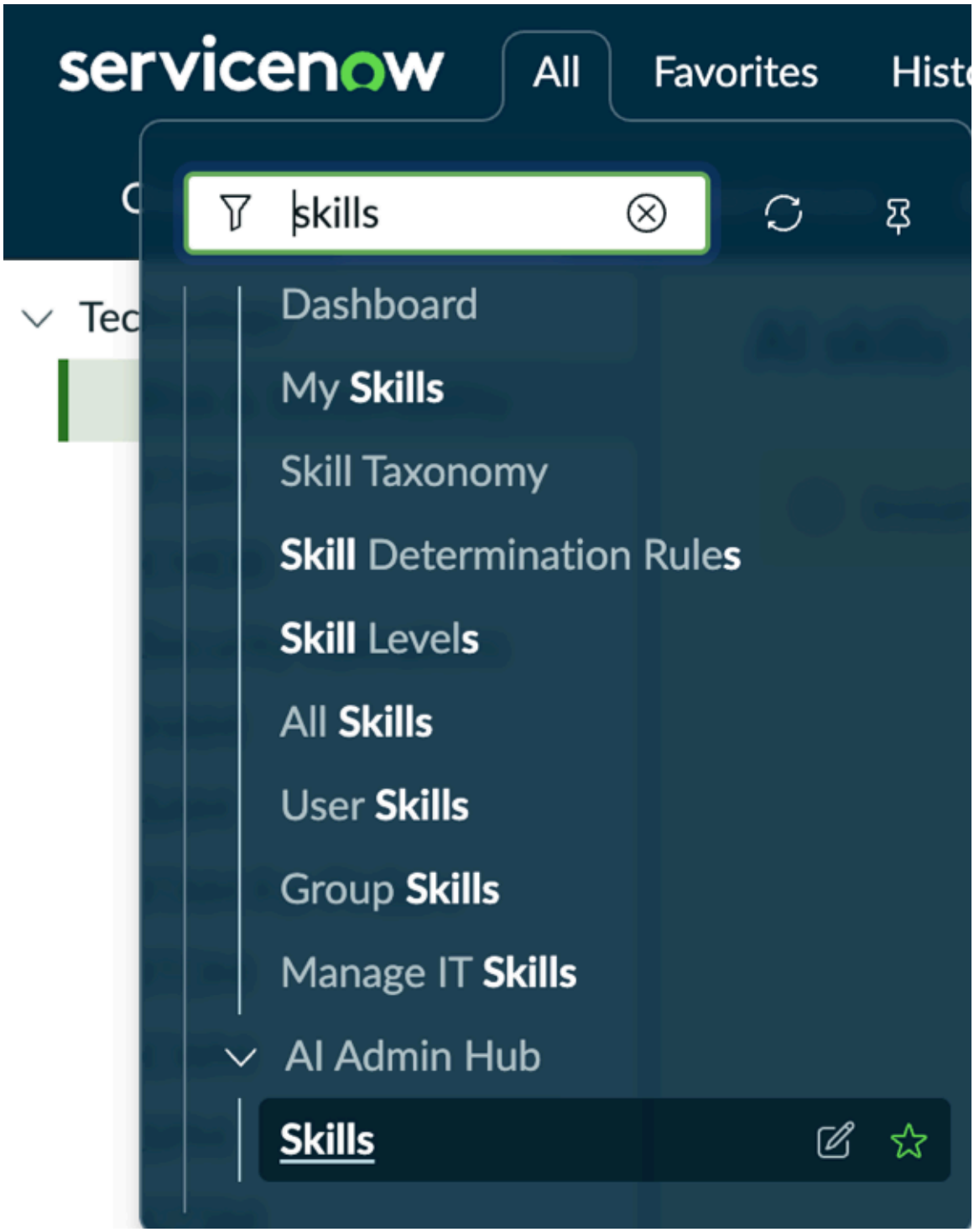
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Saving and activating the configuration setup process is the same across all ServiceNow Otto skills.

Before you begin
Role required: admin

Procedure

1. Navigate to **All** > **AI Admin Hub** > **Skills** to access the **AI Skills** tab of the AI Admin Hub console.

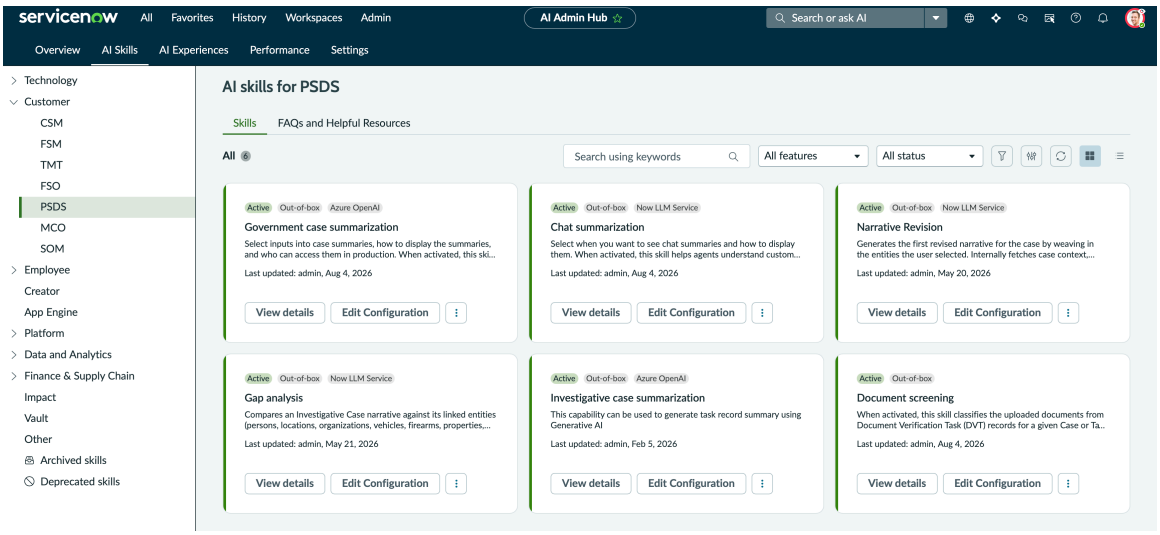


2. Activate and configure the skills for the ServiceNow Otto for PSDS.
   The following ServiceNow Otto for PSDS skills can be customized:

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- Case Summarization
- Chat Summarization

These features are grouped under the **Customer** workflow group. Select **PSDS** in the dropdown to access the skills for ServiceNow Otto for Public Sector Digital Services (PSDS). Each feature has its associated skills.

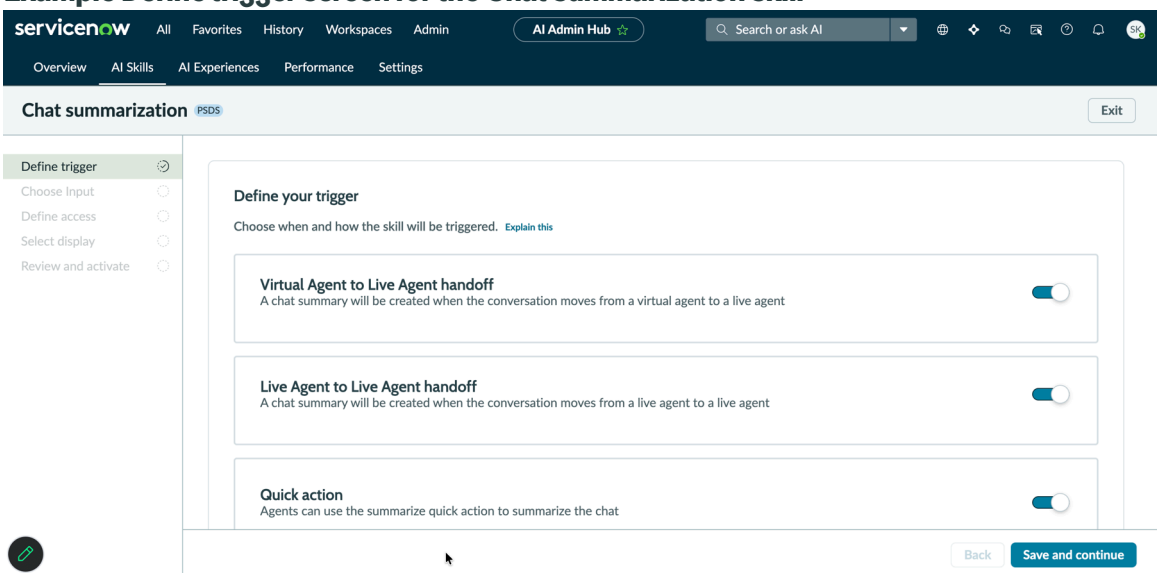


3. On the feature card that is associated with the skill that you would like to activate, select **View details**.

   For the Government case summarization skill, select **View details** under the Government case feature card.

4. In the All available skills section for the desired feature, select **Activate skill**.
5. Select the inputs or triggers for the selected skill.

Example Define trigger screen for the Chat summarization skill



6. After you configure all inputs or triggers for the selected skill, select **Save and continue** to go to the next step.
   You can return to a previous step by using the **Back** button.
7. Define the availability of the skill.

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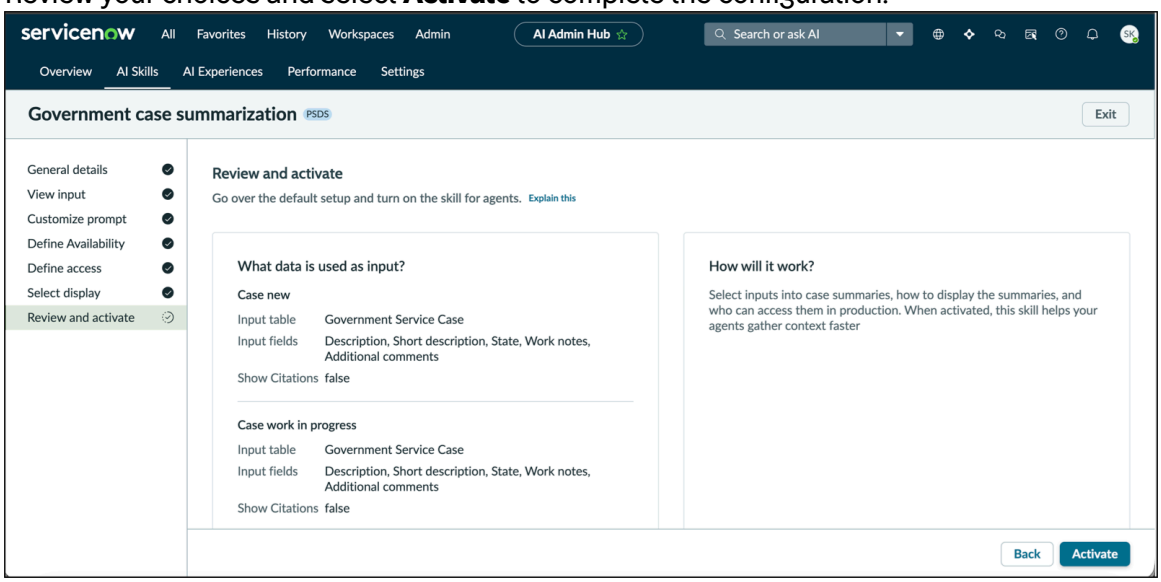
Note: This step applies to the case summarization and resolution notes generation skill. If you're configuring the chat summarization skill, you will see the next step as **Choose input**. You can select the customer-facing portals that you want to use as the source of the input data. The default product portal and portals that are already in use by other products can't be selected.

You can configure the skill to be always available to users, or you can select conditions that must be met before the skill is available. Selecting **Customize skill availability** displays a condition builder.

8. After you configure the skill availability, select **Save and continue** to go to the next step.
9. Select where you would like to display the skill.
   - **In-product**: When selected, the ServiceNow Otto skills are displayed on forms and workspaces. For the skills that appear in-product, select the down arrow to identify the roles that can use the skill.
   - ***ServiceNow Otto*** **panel**: When selected, ServiceNow Otto skills are available in the ServiceNow Otto panel. If you don't see this option, you must activate the ServiceNow Otto panel. For more information, see Activate the ServiceNow Otto panel standard chat. For the skills that appear in the ServiceNow Otto panel, select the down arrow to identify the roles that can use the skill.

     Note: Selecting **In-product** will allow the case summarization card to show on the process based experience playbook page in the CRM Workspace. For Government case summarization, select **In-product**.

10. After you configure the display for the selected skill, select **Save and continue** to go to the next step.
11. Review your choices and select **Activate** to complete the configuration.



Result

Your skill is configured.

What to do next

You can go back to the AI Skills page to configure another skill.

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Related topics

- AI Admin Hub
- Configure ServiceNow Otto for Public Sector Digital Services (PSDS)
- Using generative AI with ServiceNow Otto for Public Sector Digital Services (PSDS)

Activate the Document screening AI skill in ServiceNow Otto for PSDS

Activate the Document screening AI skill to use ServiceNow Otto for PSDS gen-AI to screen documents in the Social Benefits Playbook. The skill classifies document types, validates them against case requirements, and flags issues with clear explanations. Agents receive AI-composed messages to send to constituents with resubmission instructions.

Before you begin

Important: Some generative AI skills, agents, and agentic workflows are turned on by default. The default behavior works as follows:

New customers

When you install an AI product, designated generative AI skills, AI agents, or agentic workflows are turned on automatically.

Existing customers who are upgrading (starting with Zurich Patch 4)

There is no change to skills, agents, or agentic workflows that are currently enabled and customized.

An AI asset is turned on if:

- The AI plugin is installed, but the asset was never turned on.
- An admin has never adjusted roles for the skill.

An AI asset is not turned on if:

- The asset was previously turned on, and then turned off again.
- An admin has adjusted roles for the asset.

For more information, see AI agents, skills, and agentic workflows on by default.

- Confirm that the following applications and plugins are installed:
  - ServiceNow Otto in Document Intelligence (sn_docintel_gen_ai)
  - Document Processor (sn_doc_processor)
  - Service Applicant Information (sn_svc_appl_info)
  - ServiceNow Otto for Public Sector Digital Services (PSDS)
  - Social Benefits Playbook, Grants Management, **or** License and Permit Playbook

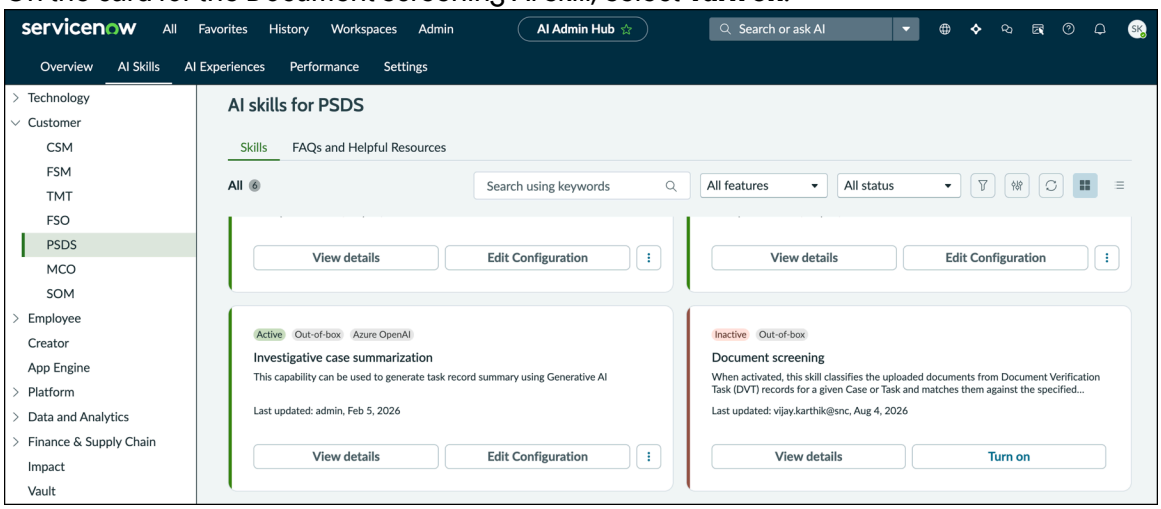
  For more information on configuring ServiceNow Otto in Document Intelligence, see .
- Perform this task in your ServiceNow instance, ensuring the ServiceNow Otto for Public Sector Digital Services (PSDS) Application scope is selected.
- Role required: admin

Note: AI Admin Hub (sn_nowassist_admin) and ServiceNow Otto for Platform (sn_genai_platform) plugins must be installed.

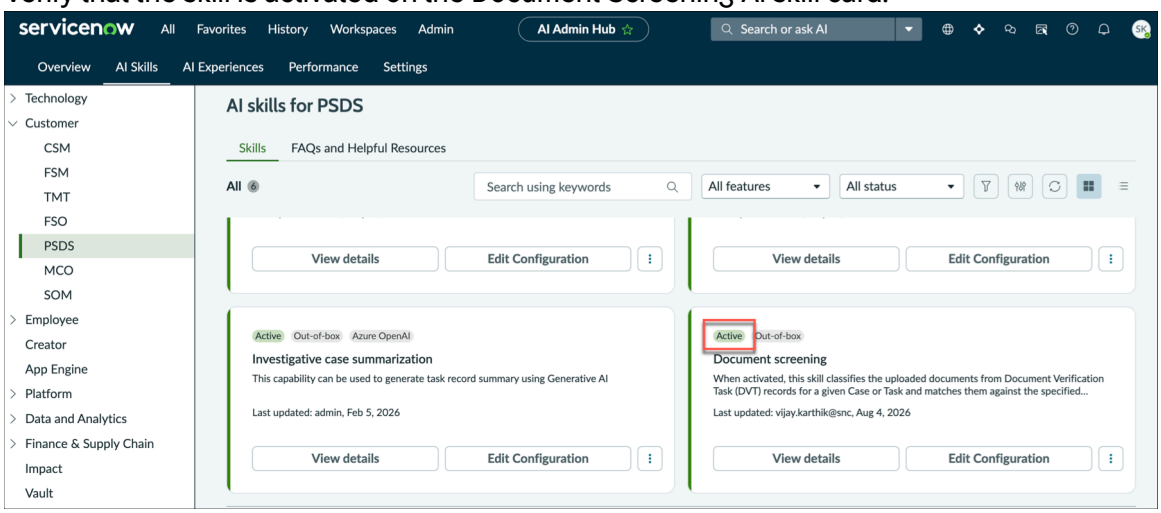
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Procedure

1. Navigate to **All** > *AI Admin Hub* > *ServiceNow Otto* **Skills**.
2. In the workflow list, select **Customer** > *PSDS*.
3. On the card for the Document screening AI skill, select **Turn on**.



4. Configure user access on the pop-up modal to specify who can use this skill.
   Access control lists (ACLs) are implemented to identify the users permitted to access this skill, and are generated automatically).
5. Select **Turn on**.
6. In the dialog box, select **Back to skills**.
7. Verify that the skill is activated on the Document Screening AI skill card.



Configure the Investigative case summarization skill in ServiceNow Otto for Public Sector Digital Services (PSDS)

Activate and customize the Investigative case summarization skill in the ServiceNow Otto for Public Sector Digital Services (PSDS) application so that investigators can use the generative AI skills in CSM Configurable Workspace and in Public Sector Digital Services Core UI.

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Before you begin

Important: Some generative AI skills, agents, and agentic workflows are turned on by default. The default behavior works as follows:

New customers

When you install an AI product, designated generative AI skills, AI agents, or agentic workflows are turned on automatically.

Existing customers who are upgrading (starting with Zurich Patch 4)

There is no change to skills, agents, or agentic workflows that are currently enabled and customized.

An AI asset is turned on if:

- The AI plugin is installed, but the asset was never turned on.
- An admin has never adjusted roles for the skill.

An AI asset is not turned on if:

- The asset was previously turned on, and then turned off again.
- An admin has adjusted roles for the asset.

For more information, see AI agents, skills, and agentic workflows on by default.

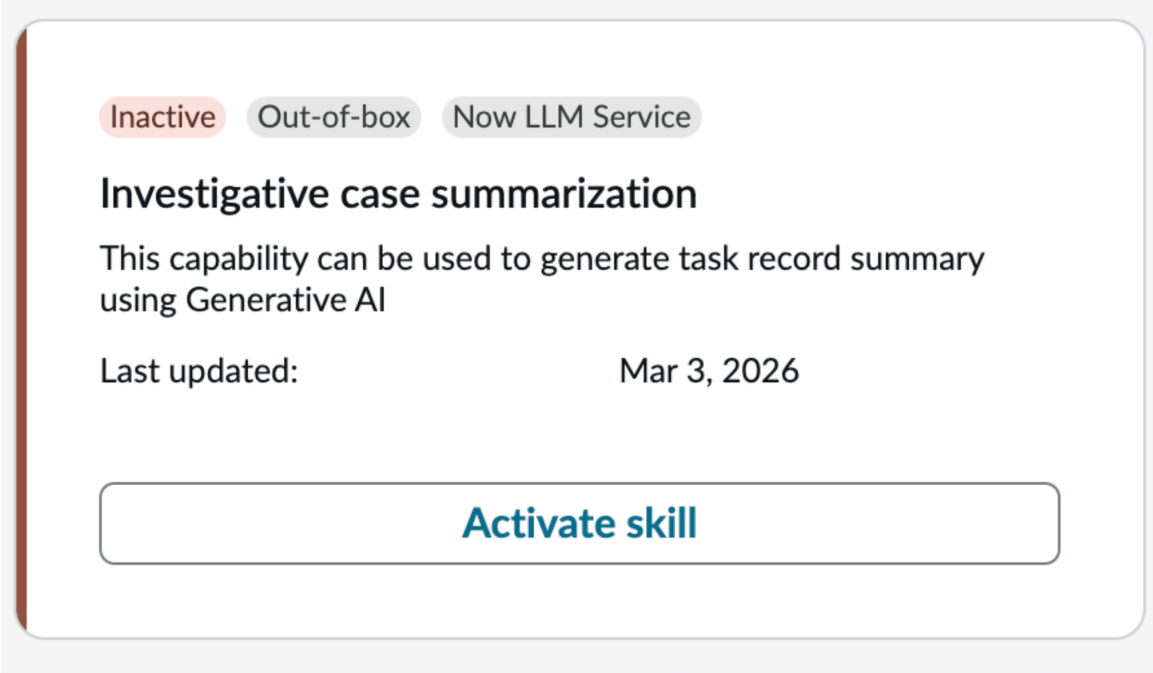
- Confirm that the following applications and plugins are installed:
  - ServiceNow Otto for Public Sector Digital Services (PSDS)
  - Investigative Case Management

  Note: AI Admin Hub and ServiceNow Otto® for Platform (sn_genai_platform) plugins must be installed.
- Perform this task in your ServiceNow instance, ensuring the ServiceNow Otto for Public Sector Digital Services (PSDS) Application scope is selected.
- Role required: admin

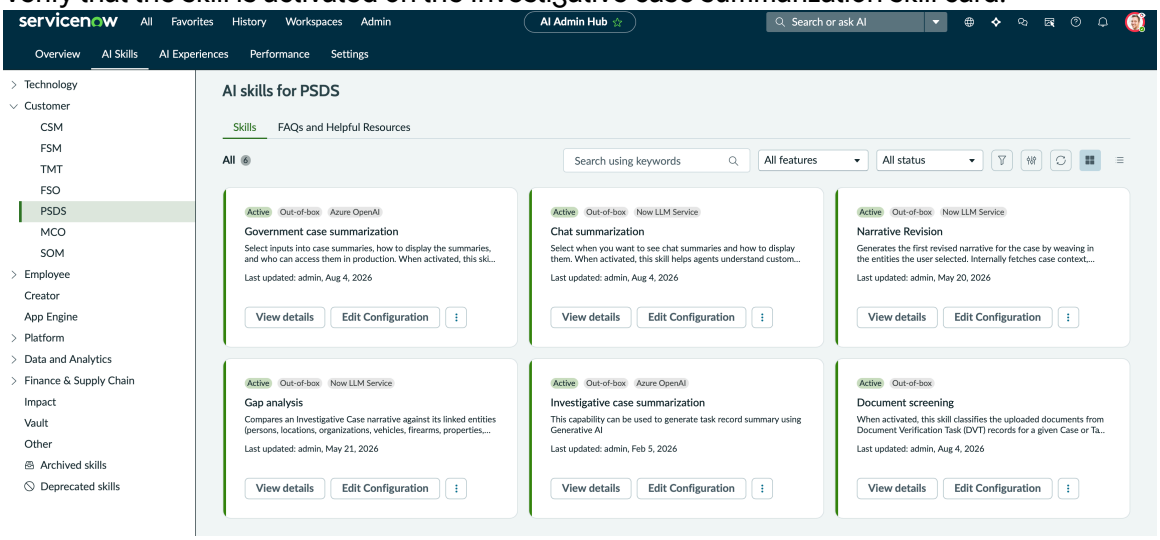
Procedure

1. Navigate to **All** > *AI Admin Hub* > **AI Skills**.
2. In the workflow list, select **Customer** > *PSDS*.
3. On the card for the Investigative case summarization AI skill, select **Activate Skill**.

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4. In the General details section, select **Save and continue**.
5. In the View input section, select **Save and continue**.
6. In the Customize prompt section, select **Save and continue**.
7. Define how the skill is available to your users.
8. Configure user access on the pop-up modal to specify who can utilize this skill.
   Access control lists (ACLs) are implemented to identify the users permitted to access this skill, and are generated automatically.
9. Toggle the Display property to **On** in the In-product card and ServiceNow Otto panel to configure where to display the case summarization.
   This is what allows the case summarization card to show in the Investigative Case Management workspace page.
10. Review your choices and select **Activate** to complete the skill customization.
11. Verify that the skill is activated on the Investigative case summarization skill card.



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Configure the Investigative case narrative refinement skill in ServiceNow Otto for Public Sector Digital Services (PSDS)

Activate and customize the Investigative case narrative refinement skill in the ServiceNow Otto for Public Sector Digital Services (PSDS) application so that investigators can use the generative AI skills in CSM Configurable Workspace.

About this task

The Investigative Case Management Case narrative refinement skill helps investigators refine a investigative case narrative or case summary for tone, length, and clarity. By activating and using this configuration, investigators can adjust the case summary or narrative with one of several options: Casual, Formal, Shorten, or Elaborate.

Before you begin

Important: Some generative AI skills, agents, and agentic workflows are turned on by default. The default behavior works as follows:

New customers

When you install an AI product, designated generative AI skills, AI agents, or agentic workflows are turned on automatically.

Existing customers who are upgrading (starting with Zurich Patch 4)

There is no change to skills, agents, or agentic workflows that are currently enabled and customized.

An AI asset is turned on if:

- The AI plugin is installed, but the asset was never turned on.
- An admin has never adjusted roles for the skill.

An AI asset is not turned on if:

- The asset was previously turned on, and then turned off again.
- An admin has adjusted roles for the asset.

For more information, see AI agents, skills, and agentic workflows on by default.

- Confirm that the following applications and plugins are installed:
  - ServiceNow Otto for Public Sector Digital Services (PSDS)
  - Investigative Case Management

  Note: AI Admin Hub (sn_nowassist_admin) and ServiceNow Otto for Platform (sn_genai_platform) plugins must be installed.
- Perform this task in your ServiceNow instance, ensuring the ServiceNow Otto for Public Sector Digital Services (PSDS) Application scope is selected.
- Role required: admin

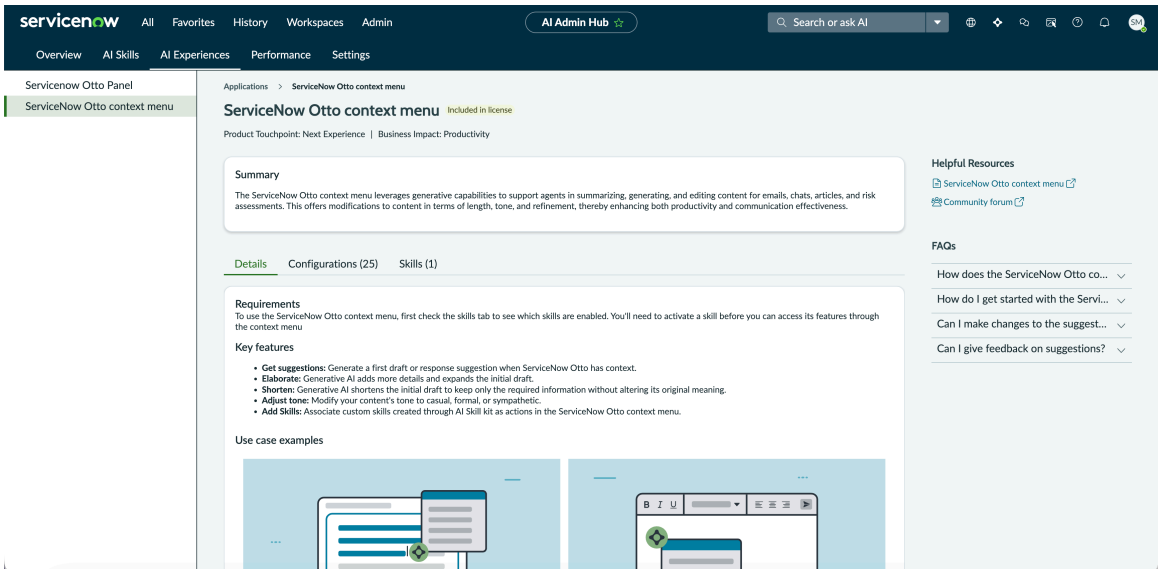
Procedure

1. Navigate to **All** > *AI Admin Hub* > **Experiences**.
2. In the side panel workflow list, select *ServiceNow Otto* **Context Menu**, and select the Configurations related list.
3. Select **ICM Case Narrative**.

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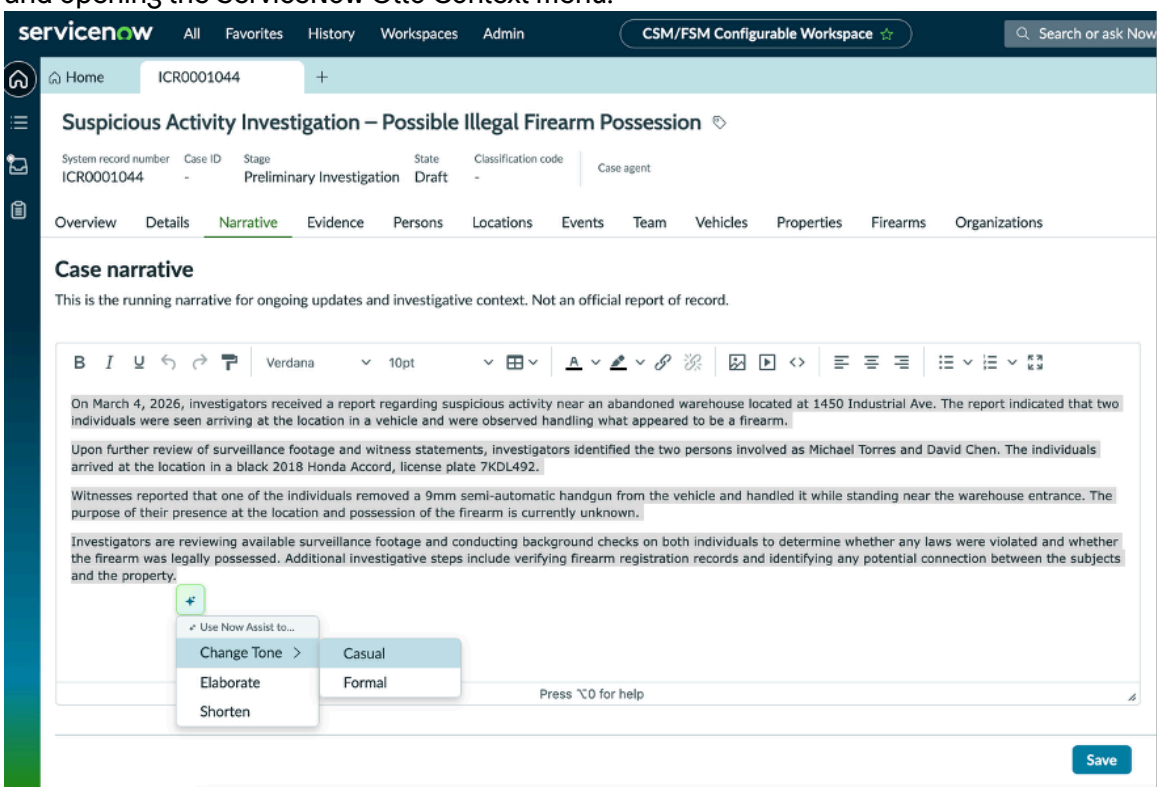
4. Select the more actions (⋮) icon for that record, and select **Activate** or **Deactivate**.

   Note: This configuration is Activated by Default.



5. To edit the configurations of this skill, select **Edit Configurations**.
6. In the workflow side panel, select Configure Experience.

   Here, you can change the default actions for the skill when the AI sparkle icon (✦) context menu is selected in the case narrative field. You can also add and configure tones as necessary for the case narrative output. Tones such as Casual, Formal, Shorten and Elaborate are selected by default.
7. Select **Save and Continue** whenever prompted.
8. Verify that the skill is activated and configured by going to an Investigative case narrative field and opening the ServiceNow Otto Context menu.



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Configure the Government case summarization skill in ServiceNow Otto for Public Sector Digital Services (PSDS)

Activate and customize the Government case summarization skill in the ServiceNow Otto for Public Sector Digital Services (PSDS) application. Government service agents can use the generative AI skills in CSM Configurable Workspace and in Public Sector Digital Services Core UI.

About this task

Government service agents can use case summarization, powered by Now LLM, to gain contextual understanding of constituent issues throughout the case's lifecycle. The case summarization skill auto-generates informative summaries that distill key details from work notes, comments, and other case data, which can help agents resolve cases faster.

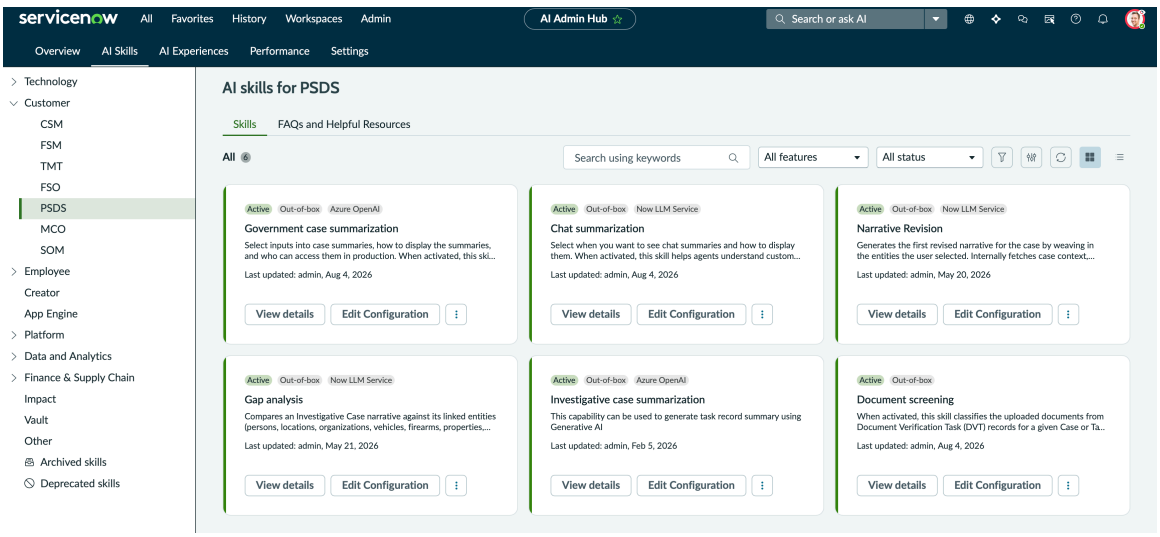
Note: The base system includes a pre-configured case summarization skill.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > *AI Admin Hub* > **Features** to access the *ServiceNow Otto* **Features** tab of the AI Admin Hub console.
2. In the dropdown, select **Customer** > **PSDS**.



3. On the Government case feature card, select **View Details**, then select **Case Summarization** under Active Skills.
   By default, the case summarization skill is activated for ServiceNow Otto for PSDS. If it is not active, select **Activate Skill** in the All available Chat skills section of the case recommendation card.
4. In the Active skills section, locate the **Government case summarization** skill.
5. Select the More actions icon ⋮ for the skill in the Active skills section, and create a copy that you can customize by selecting **Make a copy**.

   The copy that you make is listed in the Active skills section.
6. Select the copied skill from the Active skills section to open it.

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A guided setup leads you through the configuration of the general details, input, prompt, availability, display, review, and activation of the customized skill. If you complete the entire walk-through, the case summarization skill is activated.

7. In the General details step, fill in the fields.
   For information about the inputs and triggers for each skill, see Skill inputs for ServiceNow Otto for Public Sector Digital Services (PSDS).
   a. Enter a name and description for the skill.
   b. Select **Save and continue** to go to the next step.
8. View the input data for each skill, such as the base input fields and related lists for the different input templates.

   Configure the base input table fields and related lists for the different input templates (Case new, Case work in progress, and Case resolved states) for the skill.

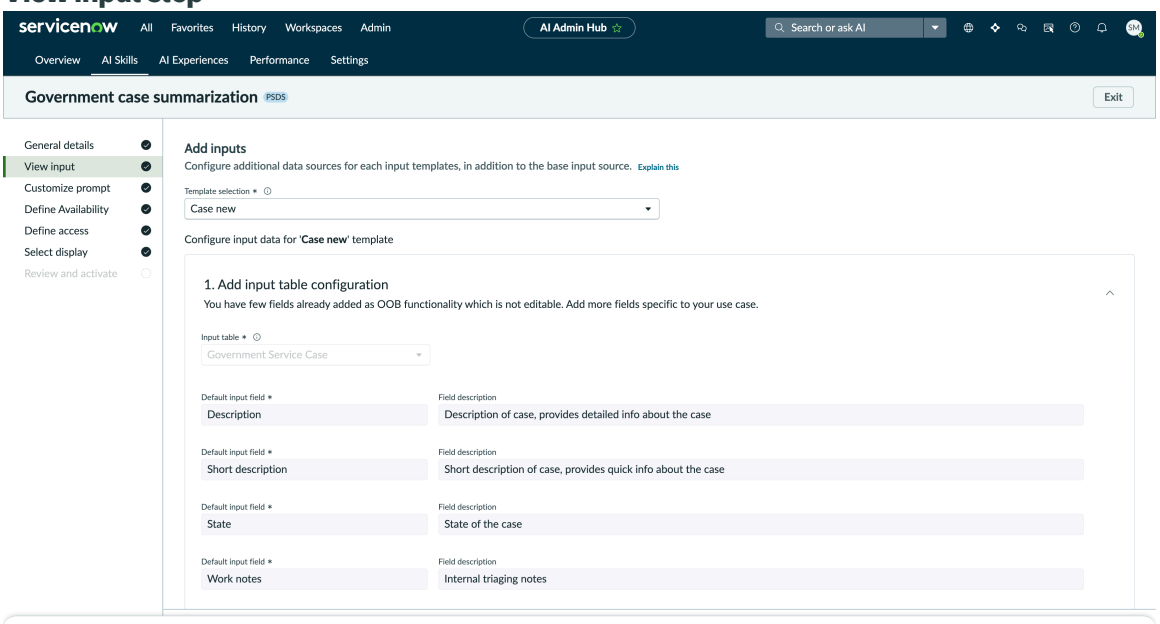
   Each skill relies on a base input table and input fields with descriptions to provide context for the Now LLM Service to generate a response.

   Select only those related tables that are offered as the base system, as part of the input data.

   a. For each input template state (New, Work in progress, and Resolved), select **+New base input field** and configure the base input table fields.

      Add multiple base input fields, as necessary.

View input step



The following table lists the base input table fields and descriptions, including a relevant example.

Base input fields

Field	Description
Base input field	Field in the case table whose value this skill uses in its response.

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Field	Description
	For example, `Short description`.
Field description	Description of the base input field value. For example, `Short description of case, provides brief information about the issue.`

b. For each input template state (New, Work in progress, and Resolved), configure the rule conditions by using the condition builder to filter the data.

The rule conditions determine when the input template is used. By default, the record state determines the input template that the Now LLM Service uses.

You can build the condition out further by selecting **+New condition set** and configuring additional parameters.

The following table lists the input template states.

Input template states

State	Description
New	State is New.
Work in progress	State is Work in Progress.
Resolved	State is Resolved.

c. For each input template state (New, Work in progress, and Resolved), select **+New data source** to configure the additional related table and activity stream data, as needed.

Adding input data sources, like the related tables and activity streams, provide more context to the Now LLM Service in a related list.

You can also add the rule conditions to these additional data sources.

The selection of the related table fields may have a direct impact on the quality of the corresponding prompt header. For example, if a prompt header requires a specific field from the related table, but that field isn't selected as input, the summary for that prompt header will contain missing information. For example, as a base case, you see one related table, such as Service level agreement (SLA), that includes all the required fields and filtering conditions for the prompt header. The SLA prompt header is preselected to help you understand how the related table, its fields, and the prompt header work together to produce a summary. You can use the SLA as a reference to configure the other related tables to determine which fields to select and which description adds the requirements of their respective prompt headers. Apply any additional conditions to filter the data further.

d. Select **Save and continue** to go to the next step.

9. Customize the prompt.

Review and test the prompt for each input template configuration. You can edit the prompt by adding new predefined sections and reordering them, as needed.

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a. For each input template state (New, Work in progress, and Resolved), select the prompt sections from the list of available sections to include in the generated summary.

   To add a section, you must configure the relevant input data prior to this step.

   The available prompt sections that you can select:

   - **Issue**
   - **Key Actions Taken**
   - **Resolution**

   The following table lists the mandatory prompt headers.

   Mandatory prompt headers

Input template state	Mandatory prompt header
New	Issue
Work in progress	▪ Issue ▪ Key Actions Taken
Resolved	▪ Issue ▪ Key Actions Taken ▪ Resolution

   You can add the **Waiting on customer** prompt to cases only if the case has an **Awaiting info** state. Otherwise, adding this header to other states could cause the Now LLM Service to generate inaccurate or unreliable results.

b. Select **Save** to continue to the test response.

c. Select a case record in the Test response section, and test the prompt response output format by selecting **Run Test**.

d. Select **Save and continue** to go to the next step.

10. Define how the skill is available to your users.

    a. Configure the skill to be always available to users, or select conditions that must be met before the skill is available.
    Selecting **Customize skill availability** displays a condition builder to filter the data further.

    b. Select **Save and continue** to go to the next step.

11. Configure where to display the case summarization.

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a. Select either **In-product**, or ***ServiceNow Otto*** **panel**.

- **In-product**: When selected, the ServiceNow Otto skills are displayed on the forms and workspaces.

  For the skills that appear in-product, select the down arrow to identify the roles that can use the skill.

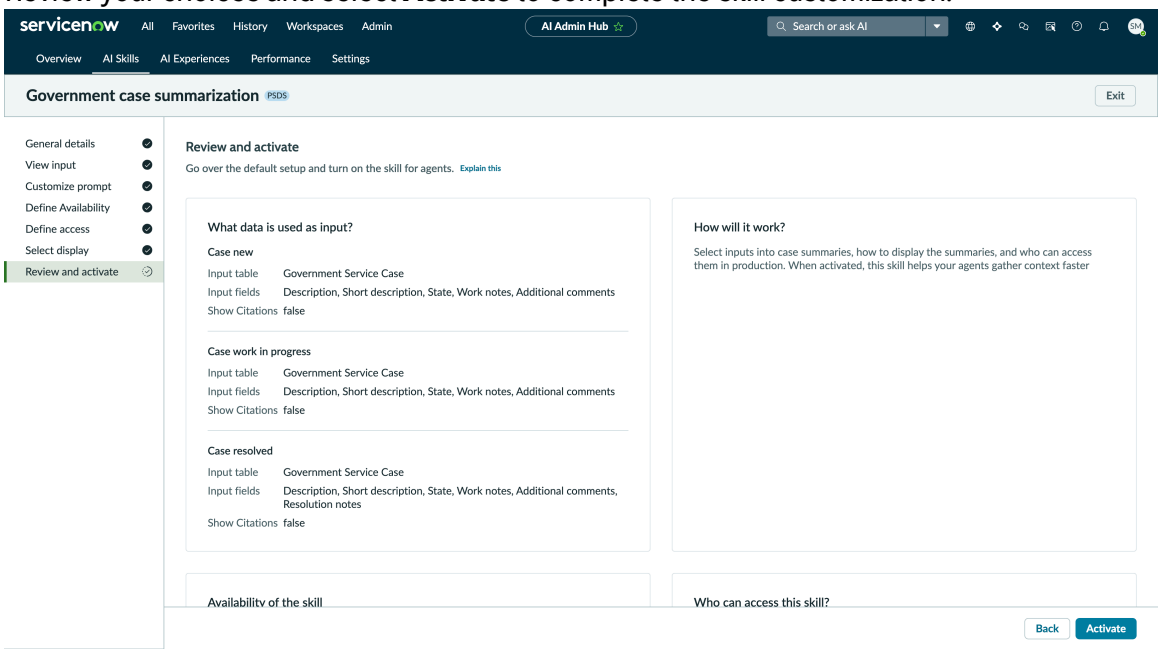
- ***ServiceNow Otto*** **panel**: When selected, the ServiceNow Otto skills are available in the ServiceNow Otto panel.

  If you don't see this option, you must activate the ServiceNow Otto panel. For more information, see Activate the ServiceNow Otto panel standard chat.

  For the skills that appear in the ServiceNow Otto panel, select the down arrow to identify the roles that can use the skill.

b. Select **Save and continue** to go to the next step.

12. Review your choices and select **Activate** to complete the skill customization.



Configure chat summarization skill in ServiceNow Otto for Public Sector Digital Services (PSDS)

Activate and configure the ServiceNow Otto for Public Sector Digital Services (PSDS) skill so that agents can use the generative AI skills in CSM Configurable Workspace and in Public Sector Digital Services Core UI.

Before you begin

Role required: admin

About this task

Agents can utilize chat summarization to gain contextual understanding of support issues throughout a chat's lifecycle, even if it involves virtual agent interactions, transfers to live agents, or multiple hand-offs between agents.

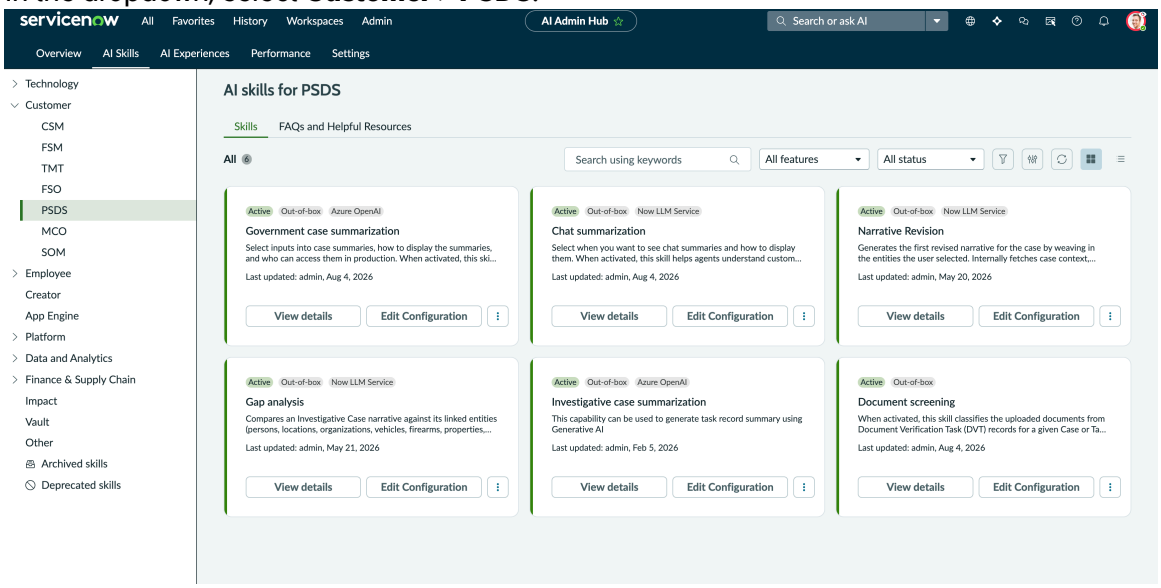
In the ServiceNow Otto for PSDS Admin Console, admins can:

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- Define the trigger that determine when a summary is generated (chat handoff, quick action, wrap-up)
- Define where to display (CRM Workspace and/or ServiceNow Otto panel)
- Add/remove roles to control who can view the skill

Procedure

1. Navigate to **All** > *AI Admin Hub* > **Skills** to access the **AI Skills** tab of the AI Admin Hub console.
2. In the dropdown, select **Customer** > **PSDS**.



3. On the Chat feature card, select **View Details**, then select **Chat Summarization** under Active Skills.
   By default, the chat summarization skill is activated for ServiceNow Otto for PSDS. If it is not active, select **Activate Skill** in the All available Chat skills section of the chat recommendation card.
4. Select **Define Trigger**, the first step in the guided setup.

   By default, many of the options in the setup are configured for the most common use cases. You can use the **Back** button to navigate through the steps.
5. Using the toggles, select what actions trigger the chat recommendation skill.
6. Select whether you want the summary to be formatted with bullet points.

   By default, summaries are written with bullet points, but can be configured to appear in paragraph form by toggling this off.
7. Go to **Choose Input** by selecting **Save and continue**.
8. **Optional:** Select any additional data sources that you want the large language model (LLM) to take into account when generating the chat summary.
9. **Optional:** Select any additional portals to allow chat summaries to be generated for conversations occurring on that portal.

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> **Note:** If **Add Additional Data Sources** is toggled on, the admin **must** specify a portal and enable a specific channel in the Portals dropdown for the requester to be able to initiate the chat on that portal. Otherwise, the agent will receive an error message. By default, Government Service Portal (GSP) for PSDS is selected as the portal, and cannot be deselected.

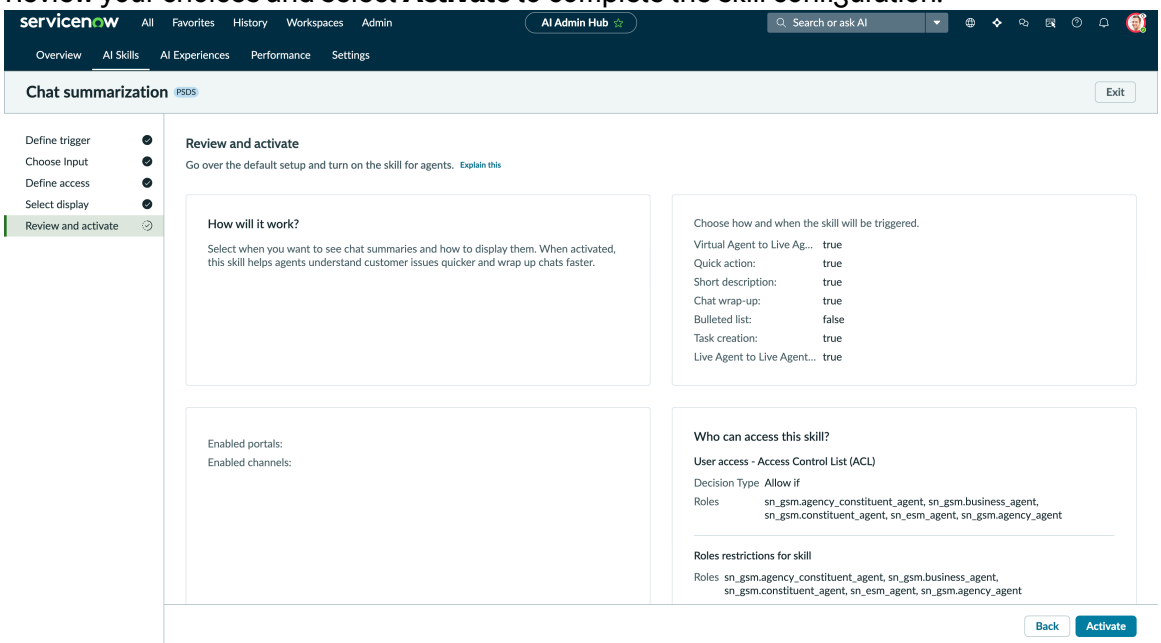
10. Select **Save and continue**.
11. Go to **Select display**, and select where you would like to display the skill.

    You can select both in-product, ServiceNow Otto panel, or both.

    - **In-product**: When selected, ServiceNow Otto skills are displayed on forms and workspaces.
    - ***ServiceNow Otto*panel**: When selected, ServiceNow Otto skills are available in the ServiceNow Otto panel. If you don't see this option, you must activate the ServiceNow Otto panel. For more information, see Activate the ServiceNow Otto panel standard chat.

      Select the down arrow to configure the user roles that can access the skill.

    Select the arrow near the toggle to select roles for who can access the skill. You can add roles by entering the name of the role in the **User roles** field. You can remove existing roles by selecting the **X** icon in the role bubble. You must have at least one role specified, but you can add as many roles as you like.
12. Review your choices and select **Activate** to complete the skill configuration.



Result

Chat summarization is active and customized for the desired workflow.

What to do next

Review the performance of the ServiceNow Otto for PSDS chat summarization skill on the AI Admin Hub console. Learn more about tracking your ServiceNow Otto usage at Monitoring Now Assist usage in Subscription Management.

Configure AI Search for ServiceNow Otto for Public Sector Digital Services (PSDS)

Activate the ServiceNow Otto in AI Search application to extract actionable Q&A Genius Result answers from knowledge articles found in the Service Portal, Virtual Agent, Employee Center, and global searches using generative AI.

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About this task

Configure and use the AI Search engine in the ServiceNow Otto for Public Sector Digital Services (PSDS) application.

Note: By default, AI Search is enabled in ServiceNow Otto for Public Sector Digital Services (PSDS). Follow these steps only if the application has been previously turned off.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **AI Search** > **AI Search Status**.
2. If the screen says you don't have AI Search on the instance, select **Request AI Search**.
3. Wait until AI Search is displayed as activated and ready for use.

Configure AI search profiles with ServiceNow Otto for PSDS

You can enable AI Search users to search content and metadata from documents in all or part of the knowledge bases, external repositories, and remote tables.

ServiceNow Otto for PSDS supports additional configuration for AI Search, such as search profile configuration.

AI Search for ServiceNow Otto for Public Sector Digital Services (PSDS) stores search experience settings in search profiles. Define a search profile for each unique search experience that you want to offer users in a ServiceNow AI Platform application. Create and populate synonym and stop word dictionaries. Configure typo handling dictionary settings. Define Genius Results and result improvement rules.

A search profile contains settings that determine how AI Search generates search results for a given search. The search application's configuration specifies which search profile to use, and also determines how the generated results are displayed to users.

For more information on AI search profiles, see Search profiles in AI Search.

Create a search profile using ServiceNow Otto for PSDS

Create a new search profile to store search experience settings for ServiceNow Otto for PSDS AI Search.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **AI Search** > **Search Experience** > **Search Profiles**.
2. Select **New**.
3. On the Search Profile form, fill in the fields.
   For a description of the field values, see Search Profile form.
4. Select **Submit**.

Result

The new search profile appears in the AI Search Search Profiles list with **State** set to *New*. An informational message and an alert triangle icon (⚠) indicate that the new search profile has never been published.

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What to do next

Your new search profile includes sample synonym and stop word dictionaries and a default typo handling dictionary. For more details on configuring and populating these dictionaries, see Synonyms, Stop words, and Typo handling.

To make content searchable using your new search profile, link one or more search sources to it.

Link a search source to a search profile in ServiceNow Otto for Public Sector Digital Services (PSDS)

Link search sources to a search profile to specify the content that a government service agent can search through that profile.

Before you begin

Role required: admin

About this task

Linking a search source to a search profile makes its filtered content available for searches using that search profile. AI Search only indexes and uses content from the search profile's linked search sources when finding and generating standard search results and Genius Result answers.

Procedure

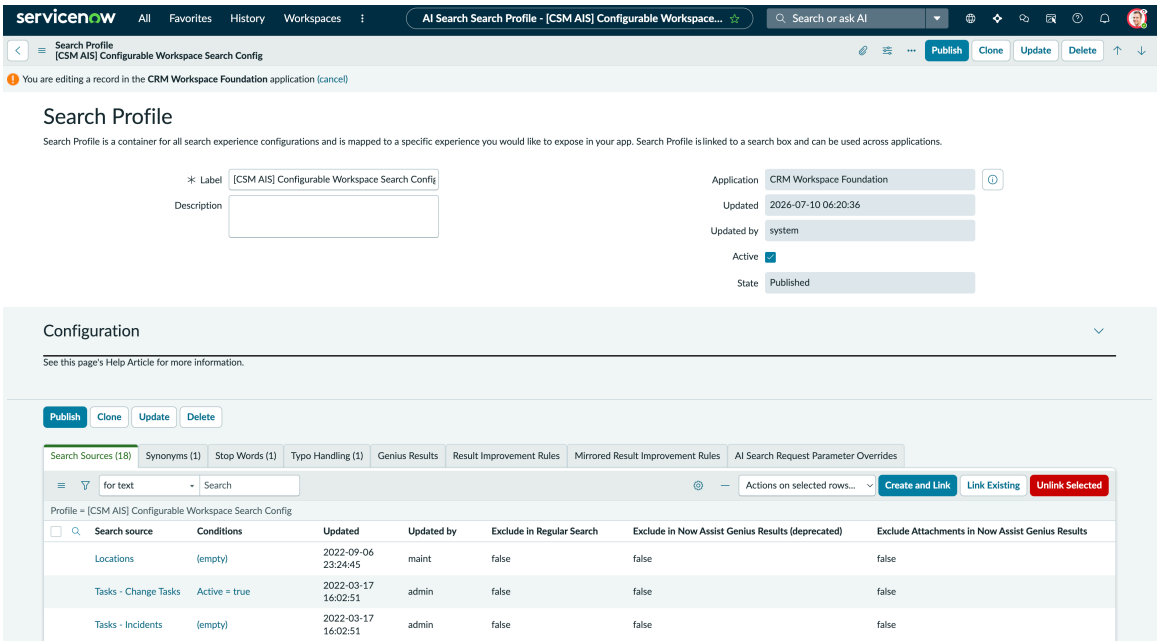
1. Navigate to **All** > **AI Search** > **Search Experience** > **Search Profiles**.
2. Open the search profile that you want to link the search source to.
   To configure single-turn AI Search for use in the ServiceNow Otto Panel, select the **[CSM AIS] Configurable Workspace Search Config** search profile,
3. In the Search Sources related list, select **Link Existing**.
   To configure single-turn AI Search, select the Genius Results related list, then select **Link Existing**.
4. On the Search Profile-Search Source Mapping form, fill in the fields.

   To configure single-turn AI Search, enter *`ServiceNow Otto`* **Q&A** in the Genius Result Configuration field, and set the order to **1**.

   For a description of the field values, see Search Profile - Search Source Mapping form.

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5. Select **Submit**.



Result

The new search source appears in the Search Sources or Genius Results related list. Search query results immediately reflect changes to the set of records searchable through the search profile.

What to do next

To make a search profile's settings active in search queries, you must publish it.

Publish a search profile in ServiceNow Otto for Public Sector Digital Services (PSDS)

Publish a search profile to make its settings, and any pending changes to its settings, active in search queries.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **AI Search** > **Search Experience** > **Search Profiles**.

   Note: Search profiles with the *New* state display an alert triangle icon (⚠). An informational message notifies you to publish these search profiles.

2. Open the search profile that you want to publish.
3. Select **Publish**.

Result

The search profile appears in the AI Search Search Profiles list with **State** set to *`Published`*, and can be used to filter what search sources are being indexed by the ServiceNow Otto for PSDS AI Search.

Activate an AI Agent in Public Sector Digital Services AI Agent Collection

Configure and activate standalone AI agents to perform various tasks.

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Roles required to activate and access agentic AI

The roles required to activate and access the AI Agents respectively are as follows:

Roles and responsibilities

Roles	Responsibilities
PSDS AI admin [sn_gsm_ai_agents.admin]	• Configure the agentic workflow. • Change AI settings. • Create and manage new workflows and AI agents. • Access and update Autonomous AI Assistant tables.
PSDS AI agent [sn_aia_agent]	Read, create, update, and delete records in the AI agent table.

Before you begin

Install the ServiceNow Otto for Public Sector Digital Services (PSDS) plugin (sn_psds_gen_ai), and ensure that it is up to date.

Role required: admin, sn_gsm_ai_agents.admin

To access AI agents for use with Public Sector:

Procedure

1. Navigate to **All** > **AI Agent Studio** > **Overview**.
2. Select **Create and manage** > **AI agents**.
3. Under AI agents, select and activate all the AI agents one by one to make them available in the ServiceNow Otto panel.
4. Select **Define the specialty**, review the fields, and confirm that the AI agent meets your requirements.

   If it doesn't meet your requirements, you can edit the AI agent. To modify the AI agent, Duplicate an AI agent, and adjust the settings according to your requirements. You can activate the AI agent template by making triggers active and setting the display settings to include the ServiceNow Otto panel.

   Important: When you modify an agentic workflow, AI agent, or tool, make sure that you update all instructions accordingly.

5. Select **Add tools and information** to review the skills, scripts, and tools available for the AI agent to perform its role.
6. Select **Define Security Controls** to review:
   - User access: Users who can access and interact with the AI agent (an ACL is generated automatically).
   - Data access: The user identity that the agent runs as, which determines roles and data access permissions.
7. Select **Add triggers** and configure conditions that start the AI agent.

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Triggers can include record conditions, schedules, or inbound email.

For more information, see Add a trigger to an AI agent.

8. Select **Channels and status** to choose the channels where this AI agent will be available for users to initiate interactions, and set its availability status.
   For more information, see Select channels and status for an AI agent.
9. Select **Save and test**.
   On this page, you can test how the AI agent completes a task.

What to do next

Important: When you modify an agentic workflow, AI agent, or tool, make sure that you update all instructions accordingly.

Use the Testing playground to Manually test the execution of an AI agent using example utterances.

If activation fails, check roles and skill configuration.

Skill inputs for ServiceNow Otto for Public Sector Digital Services (PSDS)

Use the inputs and triggers for each skill to configure how and when a skill is used.

Overview of skills

Depending on the selected skill, you can configure inputs. These settings determine how and when a skill is used. An input identifies the data that is used for a skill, such as the table and fields that are used to generate a case summary.

Chat summarization skill

The following table lists the inputs for the chat summarization skill.

Inputs for the chat summarization skill

Input	Description
Chat conversations	Virtual Agent chat conversations are input data by default.
Portals	Portals to use as the source of the input data. You can't deselect the default product portal, and portals that are already in use by other products can't be selected.

The following table lists the property that you can select to control how a chat summary is displayed.

Property for the chat summarization skill

Property	Description
Bulleted list	Chat summary as an unordered list. When this option is set to Off, the chat summary can be viewed in paragraph form.

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Case summarization skill

The case summarization skill includes the inputs that identify the table and fields that are used when a case summary is generated.

In this release, you can't modify a skill's input data source. The data source contains the tables and fields that the skill relies on.

The following table lists the inputs for the case summarization skill.

Inputs for the case summarization skill

Input	Description
Input table	Case [sn_gsm_case]
Input fields	• Description • Short description • Work notes • Additional comments

Using generative AI with ServiceNow Otto for Public Sector Digital Services (PSDS)

You can use various generative AI skills with the ServiceNow Otto for Public Sector Digital Services (PSDS) application.

Summarize the case details to help you understand the case context quicker. These summaries are useful for long-running or complex cases that include multiple conversations between agents and constituents.

Generate a summary of the Virtual Agent chat history and the chat conversation between a live agent and a customer by using the chat summarization skill in the ServiceNow Otto for Public Sector Digital Services (PSDS) application.

Synthesize and summarize information from multiple KBs to deliver relevant answers in a conversational format using the ServiceNow Otto for AI Search for CRM Workspace plugin. This skill provides actionable AI-generated or AI-selected answers to a search in CSM Workspace, and can replace a list of possible findings with a single-turn conversational result.

Skills

The ServiceNow Otto for PSDS application includes the generative AI skills that enable your agents to understand the case context so that they can propose resolutions to the constituent or approve an application faster.

Investigative case summarization

Synthesizes case narratives, entities, evidence, and activity into a structured summary, enabling agents to grasp case context and respond to inquiries. Generates detailed resolution information for investigative outcomes, allowing agents to propose solutions and integrate generated information into the case record.

Investigative case narrative refinement (via ServiceNow Otto Context Menu)

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Reviews text and surfaces gaps, inconsistencies, and tone issues before a case narrative is submitted for supervisory review. Delivers real-time refinement suggestions grounded in linked entities, evidence, and case activity, and allows investigators full control over accepting, rejecting, or editing every suggestion. Accessed via the ServiceNow Otto Context Menu upon text selection within a case narrative field.

Document screening

Review and validate uploaded documents autonomously, checking IDs, tax forms, and other supporting documents. This skill flags potential issues and surfaces key details, applying consistent validation logic across every submission.

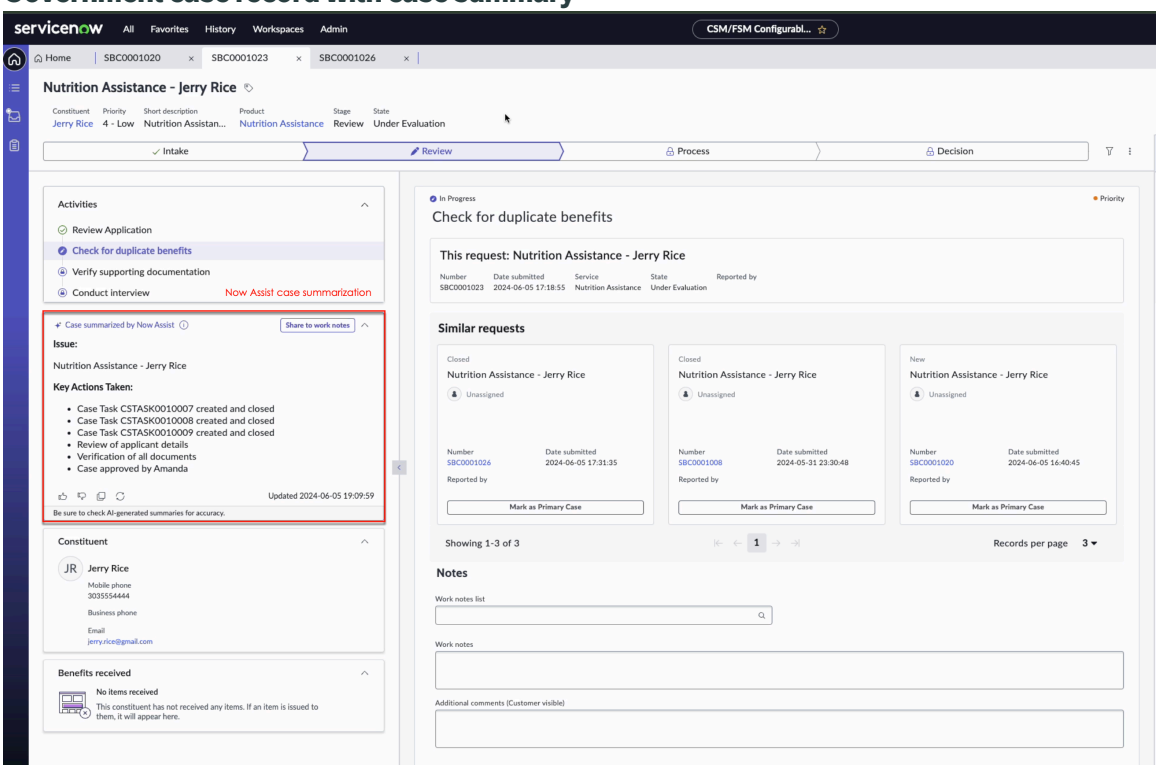
Government case summarization

Condenses comprehensive case records into concise summaries, including the issue and the actions taken, enabling agents to grasp case contexts and respond effectively to inquiries. Generates detailed resolution information for specific government case types, allowing agents to propose solutions to constituents or business contacts and integrate this information into the case record.

The case summarization skill generates a case summary and displays it above the activity stream. The summary includes the information that the agent enters in the following case record fields:

- Short description
- Description
- Work notes
- Additional comments
- Email
- Service level agreement (SLA)

Government case record with case summary



Chat Summarization

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Automatically generate summaries of agent-facing chats, capturing the context of conversations between agents and constituents or virtual agents at different points of the handoff, such as when a Virtual Agent chat history is handed off to a live agent, or when one live agent hands off a chat history with a customer to another live agent. This functionality enables critical information from interactions to be readily accessible for future reference and action.

ServiceNow Otto for AI Search

Leverage single-turn capabilities for legislation and policy summarization, providing agents with succinct overviews of complex documents and enhancing the ability to navigate and comprehend extensive legislative materials. This skill provides actionable AI-generated or AI-selected answers in searches, synthesizing and summarizing information from multiple knowledge bases to deliver relevant answers in a conversational format.

Fee Waiver AI agent skill

Determines the fee breakdown for an information request by working to arrive at a subtotal fee estimate, a recommendation for whether a fee waiver request should be approved or rejected, including reasons for any rejection, and a total fee estimate, with the fee waiver, if applicable. This skill works via the Information Request Fee Estimation AI Agent to provide an autonomous decision based on guidelines added in a specific knowledge article. For information on standalone AI agents in Public Sector, see .

Important:

- Not all model providers are available for customers with in-country SKUs, and some AI products/features are currently unavailable for in-country customers. For more information, see the KB1584492 article in the Now Support Knowledge Base. Be sure to check for model provider availability updates in future releases.
- Some AI products/features are currently unavailable for customers in the FedRAMP, NSC DOD IL5, or Australia IRAP-Protected data centers, self-hosted customers, or in other restricted environments. For more information, see the KB0743854 article in the Now Support Knowledge Base. Be sure to check for availability updates in future releases.
- Some AI products/features are currently available only for customers in some regions. Be sure to check for availability updates in future releases.
- Some AI products and skills are not available in Regulated Markets. For more information, see KB2593939: Regulated Markets AI Products/Skills Not Available. Be sure to check for availability updates in future releases.

Related topics

AI Admin Hub

Configure ServiceNow Otto for Public Sector Digital Services (PSDS)

Using generative AI with ServiceNow Otto for Public Sector Digital Services (PSDS)

Screen an uploaded document type using the Document Screening AI skill

Use ServiceNow Otto for PSDS gen-AI to screen documents in the Social Benefits Playbook, classifying document types, validating them against what's expected for the case, flagging issues and providing clear explanations, and giving agents AI-composed messages to send back to constituents with specific resubmission instructions.

Before you begin

Role required: sn_gsm.business_agent, sn_gsm.agency_agent, sn_gsm.constituent_agent, sn_gsm.agency_constituent_agent

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About this task

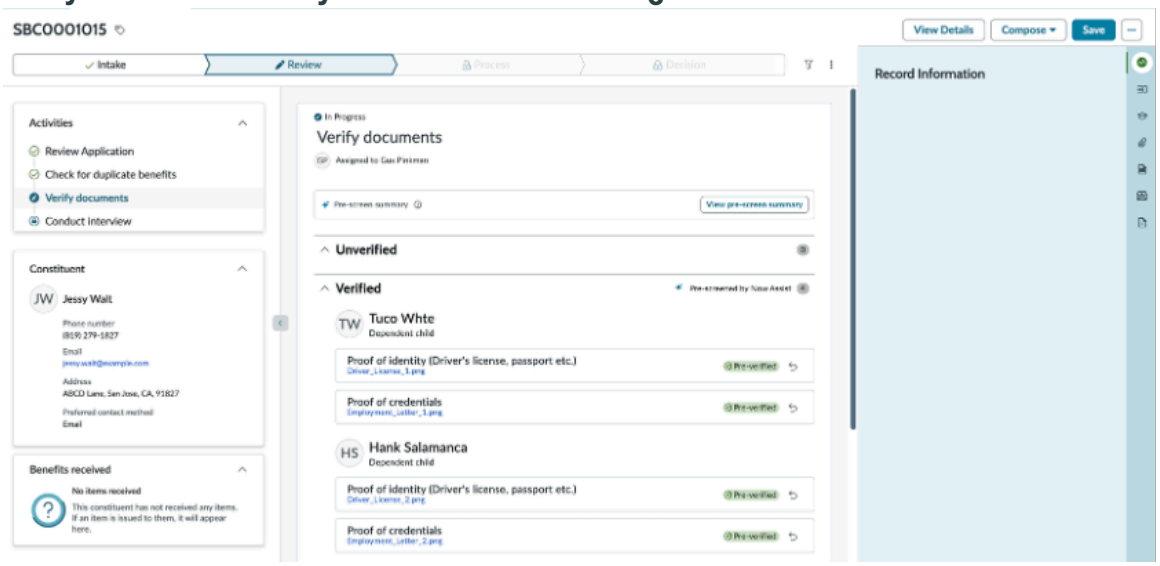
Important: This generative AI skill is turned on by default. The skill will be automatically available to appropriate role users for the application. For more information, see AI agents, skills, and agentic workflows on by default.

The Document screening generative AI skill automatically analyzes documents uploaded by applicants, identifies the type or category of each document (for example, driver's license, passport, budget, or narrative), and validates whether the uploaded document matches what was requested in an application checklist. If there is a mismatch, the agent flags it and helps government employees generate AI-assisted messages requesting corrected documentation.

Procedure

1. Navigate to a social benefits, license and permit, or information request case in the CRM Workspace.
2. Complete the activities in the Review stage once the constituent has uploaded their documents and other supporting information through the Government Service Portal and the case is moved from Intake to Review stage.

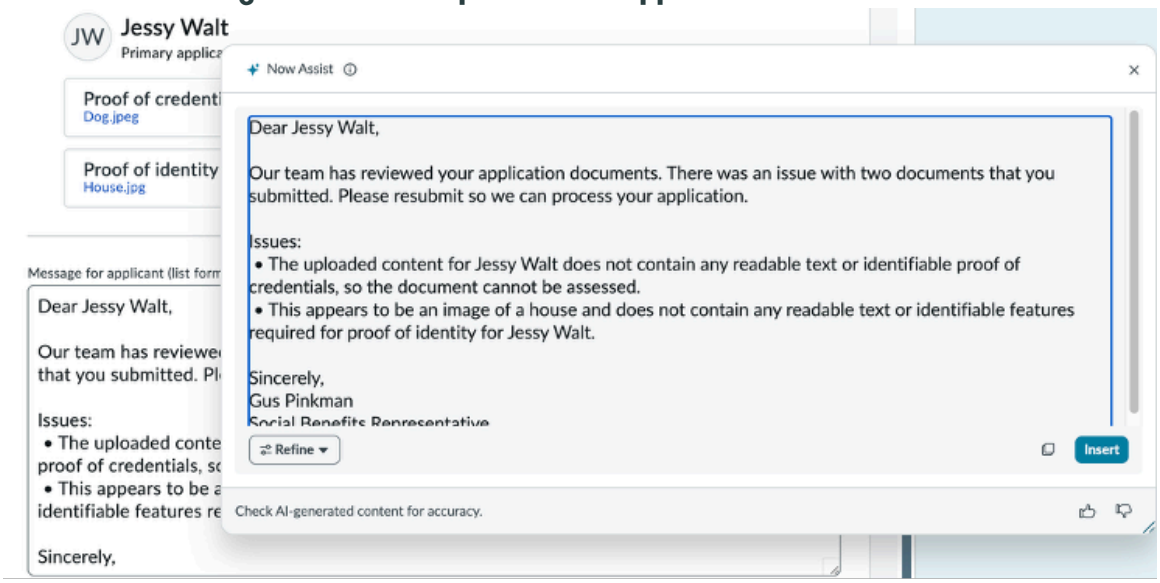
Verify documents activity with document screening skill



3. Select the document record that you want to analyze.
   Review any documents in the pre-flagged state. Select **View pre-screen summary** to view the reasons why the documents was flagged.
4. Enter a message in the the 'Message for applicant' text area to provide reasoning to the applicant and request a re-upload the pre-flagged documents, then select **Request Documents**.
   Manually type the reasons, or select **Compose message for applicant** to compose the reason summary into an ai-generated message to the applicant. Refine the reasons in a pop-up modal by selecting on the sparkle icon inside the text area to either shorten or elaborate on what was generated. Select **Insert** to add this text to the message to the applicant.

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ServiceNow Otto -generated correspondence to applicant



5. Select **Request Documents** action to request the constituent to re-upload the 'Pre-Flagged' documents.
   The Upload additional documents activity will display in the sidebar of the playbook, allowing the agent to review all pre-flagged, re-uploaded documents that the constituent has sent via the Government Service Portal. The agent can also re-upload 'Pre-Flagged' documents on behalf of the constituent. The Document screening skill will then re-analyze and mark the documents 'pre-screened' or 'pre-flagged'.

   As an agent, you can manually override the result of a document screening by selecting **Undo**, moving the Document to the **Unverified** stage, where you can:

   - Manually verify the document by selecting the checkmark icon
   - Manually flag the document by selecting the flag icon
   - Re-run the Document screening process for all unverified documents by selecting **Retry pre-screen** in the Screening incomplete modal.
6. Select **Confirm and complete** to mark the activity as complete once all of the documents have been uploaded, screened, and marked as **Pre-screened** or **Verified**.
7. Select **Confirm** to proceed.
   Any documents in the **Pre-Screened** state are changed to **Verified**.

Summarize a government case using ServiceNow Otto for Public Sector Digital Services (PSDS)

Use the case summarization skill in ServiceNow Otto for Public Sector Digital Services (PSDS) to generate a summary from selected case record fields.

About this task

Government service agents can use case summarization, powered by Now LLM, to gain contextual understanding of constituent issues throughout the case's lifecycle. The case summarization skill auto-generates informative summaries that distill key details from work notes, comments, and other case data, which can help agents resolve cases faster.

The case summarization component appears below the activity picker component on the playbook page templates, and is collapsed by default. When an agent generates a case summary by selecting **Summarize**, the component expands to display the summary information.

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The summary includes a description of the issue, the actions taken, and the next steps. For longer summaries, select **View more** and use the scroll bar to view the content.

The case summarization skill enables you to do the following actions:

- Select Summarize to create a summary of the case details.
- Select Share to work notes to copy the summary text to the activity stream.
  - Review the summary text in the Share to work notes pop-up dialog and modify the text as needed.
  - Select Save to work notes on the pop-up dialog to add the text to the activity stream.
- Select the refresh icon in the component footer to refresh the text and get the latest summary.

After generating a summary, you can:

- Review the summary information and edit as needed.
- Provide feedback on the generated summary.
- Add the summary information to the case work notes.
- Copy the summary information to the clipboard.

Note: You can also generate a case summary on demand from the ServiceNow Otto panel. .

Before you begin

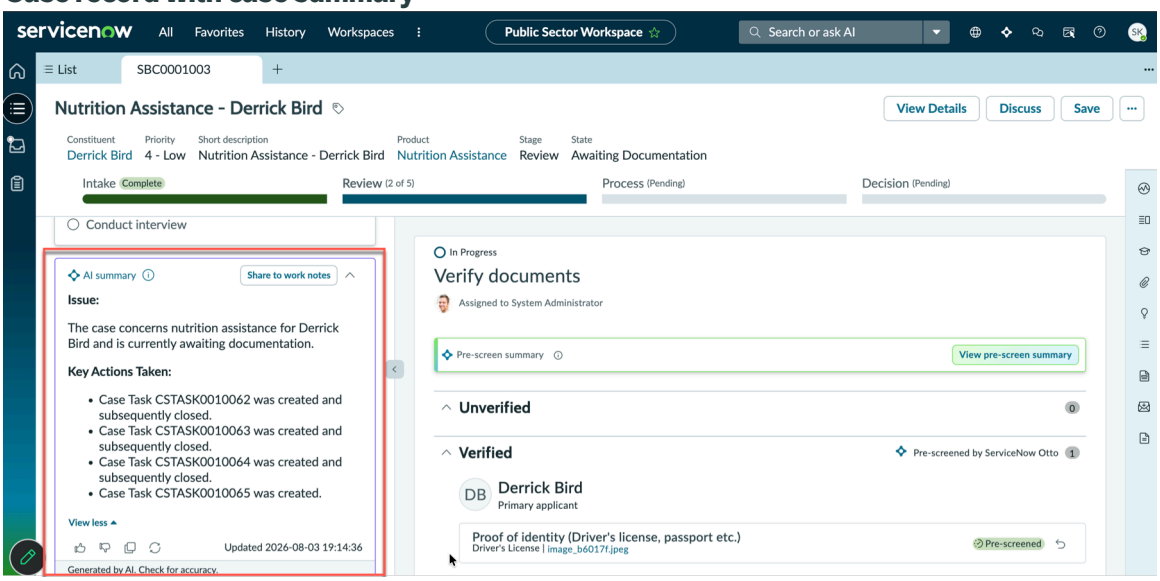
Role required: admin

Procedure

1. Open a government service case by navigating to Lists in the CRM Workspace.
2. In the Case summary by ServiceNow Otto component, select **Summarize**.

Note: The Case summary by ServiceNow Otto component appears above the constituent card. Generating and displaying the summary may take several seconds. The component is collapsed by default and expands to display the summary. For longer summaries that don't fit in the window, select **View more** and use the scroll bar to view the rest of the content.

Case record with case summary



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3. **Optional:** When you're finished summarizing a case, you can add it to the case work notes, expand or collapse it, provide feedback, copy it, or view information about it.

Option	Procedure
Save the summary information by adding it to the case work notes	**a.** Select **Share to Work notes**. **b.** In the Share Case summary as Work notes dialog box, edit the summary. **c.** Select **Save to Work notes**.
Expand or collapse the summary	Select the expand card icon ( ) or the collapse card icon ( ) to see more details or fewer summary details.
Provide feedback for the summary	If you think that the summary was helpful, select the helpful icon ( ). If you think that the summary wasn't helpful, select the not helpful icon ( ). This feedback improves the generative AI model and can help to improve the future versions of this skill. The system gathers the feedback on each generated summary and stores it in the generative AI logs (sys_generative_ai_log_list.do).
Copy the case summary	Select the copy to clipboard icon ( ) to use the case summary information for another purpose, such as pasting into an email.
View the information about the case summary	If you want to view more details about the summary, select the more info icon ( ).

Summarize an investigative case using the ServiceNow Otto for PSDS Investigative case summarization skill

Generate a summary directly from the investigative case workspace to help you understand the case context using the investigative case summarization skill in the ServiceNow Otto for Public Sector Digital Services (PSDS) application.

About this task

Investigators can utilize investigative case summarization to gain contextual understanding of the investigation throughout its lifecycle. The investigative case summarization skill auto-generates summaries that distill key details from work notes, comments, and other case data, which can help agents resolve cases faster.

The Investigative Case Management case summarization component appears on the case record page, and is collapsed by default. When an agent generates a case summary by selecting **Summarize**, the component expands to display the summary information, including a description of the issue, the actions taken, and the next steps. For longer summaries, select **View more** and use the scroll bar to view the content.

The case summarization skill enables you to do the following actions:

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- Select Summarize to create a summary of the case details.
- Select Share to work notes to copy the summary text to the activity stream.
  - Review the summary text in the Share to work notes pop-up dialog and modify the text as needed.
  - Select Save to work notes on the pop-up dialog to add the text to the activity stream.
- Select the refresh icon in the component footer to refresh the text and get the latest summary.

After generating a summary, you can:

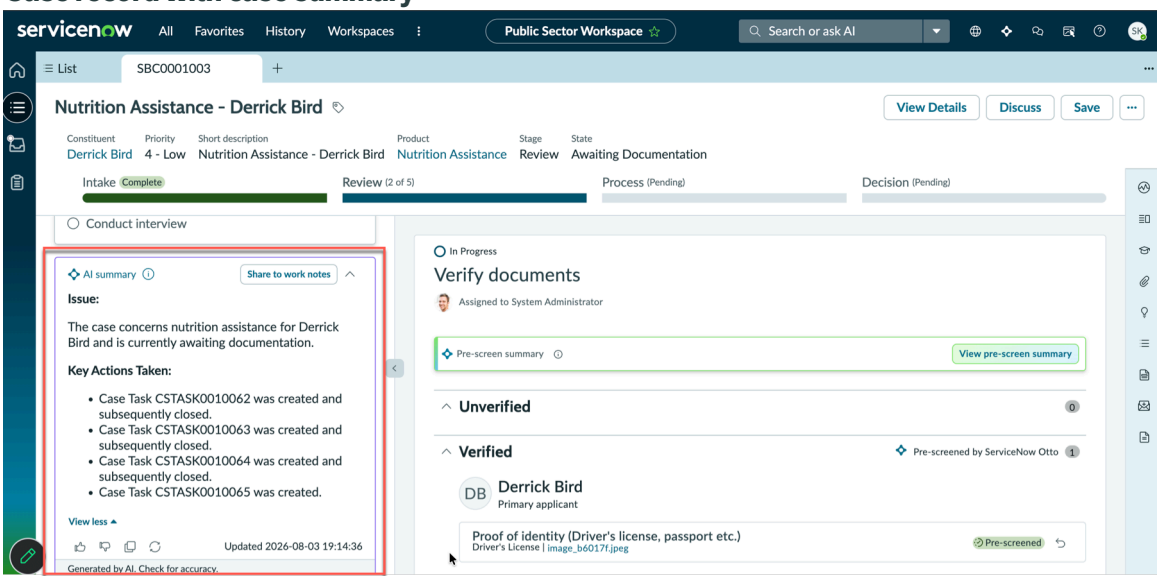
- Review the summary information and edit as needed.
- Provide feedback on the generated summary.
- Add the summary information to the case work notes.
- Copy the summary information to the clipboard.

Note: You can also generate a case summary on demand from the ServiceNow Otto panel. .

Before you begin
Role required: admin

Procedure
1. Open an investigative case by navigating to Lists in the CRM Workspace.
2. In the Case summary by ServiceNow Otto component, select **Summarize**.

Case record with case summary



3. **Optional:** When you're finished summarizing a case, you can add it to the case work notes, expand or collapse it, provide feedback, copy it, or view information about it.

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Option	Procedure
Save the summary information by adding it to the case work notes	**a.** Select **Share to Work notes**. **b.** In the Share Case summary as Work notes dialog box, edit the summary. **c.** Select **Save to Work notes**.
Expand or collapse the summary	Select the expand card icon ( ) or the collapse card icon ( ) to see more details or fewer summary details.
Provide feedback for the summary	If you think that the summary was helpful, select the helpful icon ( ). If you think that the summary wasn't helpful, select the not helpful icon ( ). This feedback improves the generative AI model and can help to improve the future versions of this skill. The system gathers the feedback on each generated summary and stores it in the generative AI logs (sys_generative_ai_log_list.do).
Copy the case summary	Select the copy to clipboard icon ( ) to use the case summary information for another purpose, such as pasting into an email.
View the information about the case summary	If you want to view more details about the summary, select the more info icon ( ).

Refine an investigative case narrative using the ServiceNow Otto for PSDS Investigative case narrative refinement skill

Review text and surface gaps, inconsistencies, and tone issues before a case narrative is submitted for supervisory review.

Before you begin

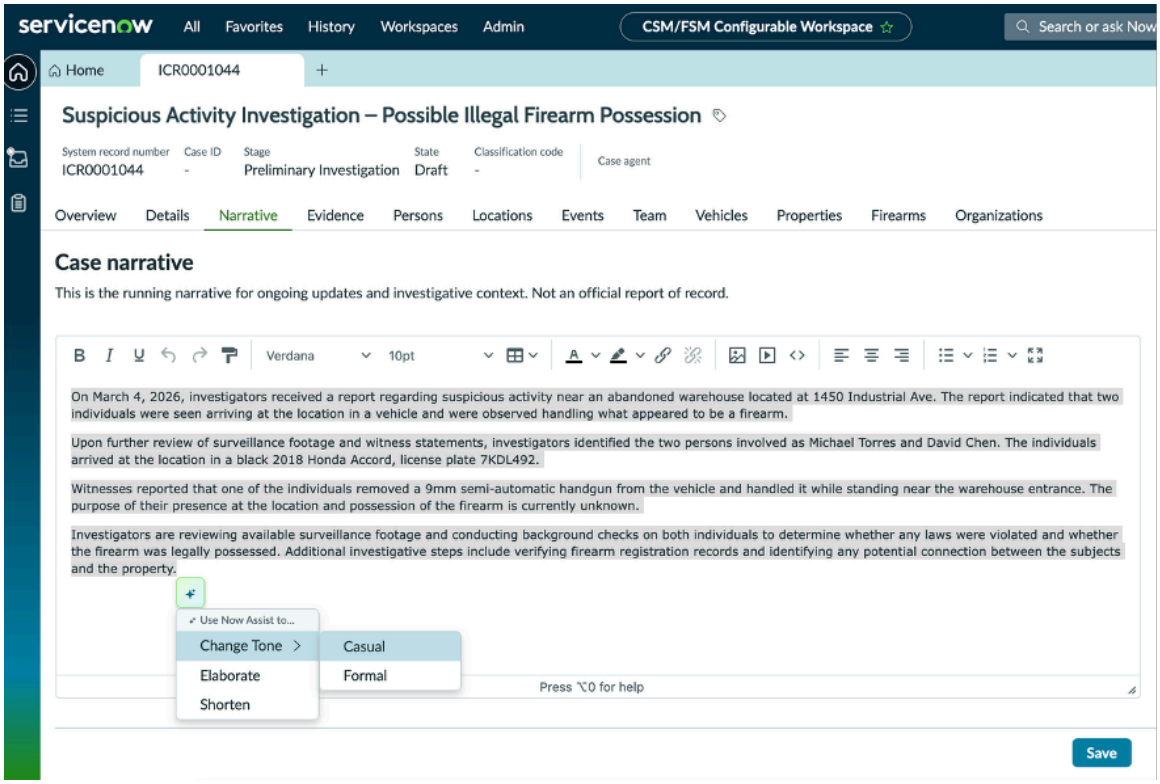
Role required: admin

Procedure

1. Navigate to the CRM Workspace and select **My active cases**.
   Alternatively, you can select a case using the CRM Workspace Lists menu by selecting **Lists** > **Investigative Cases** > **All** and selecting the case.
2. Select the case you wish to refine the narrative details for.
3. Select the **Narrative** tab.
4. In the Case Narrative field, highlight some or all of the case narrative text.
   The AI sparkle icon ( ) should automatically appear.
5. Select the AI sparkle icon ( ) and select one of the following

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Case narrative refinement skill options	Action
Change Tone	Change the narrative tone to casual or formal.
Elaborate	Expand, enhance, and refine existing narra tive text using case context and activity.
Shorten	Condense, summarize, or rephrase long narra tive text into a shorter, more concise version.



6. Upon selection of the tone, the skill will open a modal with the refined text, and you have the option to insert or reject the suggestion.
7. To accept the suggestion, select **Insert**
8. Select **Save**.

Result

The case narrative has been edited and refined. A log of edits attached to the users name appears in the activity stream, where team members assigned to the case can see a running log of what information was added and when. This is helpful if there are multiple investigators and other personas involved in the case. The case narrative can be edited and added to at any time as new details, leads, and context become available.

Summarize a chat conversation using ServiceNow Otto for Public Sector Digital Services (PSDS)

Generate a summary of the Virtual Agent chat history and the chat conversation between a live agent and a customer using the chat summarization skill in ServiceNow Otto for Public Sector Digital Services (PSDS).

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About this task

Agents can utilize chat summarization to gain contextual understanding of support issues throughout a chat's lifecycle, even if it involves virtual agent interactions, transfers to live agents, or multiple hand-offs between agents.

In a Virtual Agent conversation, when a requester chooses to connect to a live agent, a chat interaction appears in your inbox. When you accept the interaction, a summary of the Virtual Agent conversation is generated. You can request more details from the requester to resolve the issue.

You can also summarize the chat interaction when the chat ends or when an incident is created for further troubleshooting before or after the chat ends. The summary includes all points of the handoff, including the Virtual Agent conversation, and provides a context of the interaction to you and the other agents who might want to refer to it.

The chat summarization skill enables you to do the following actions:

- Summarize the Virtual Agent chat history and provide a summary of the actions taken by the customer before the customer engages with a live agent.
- Summarize the live agent and customer chat history, including the actions taken by the customer before the live agent hands off the call to another live agent and the customer engages with the new agent.
- Summarize the chat at any point during the conversation using the `/summarize` quick action.
- Summarize the chat between a live agent and a customer when a chat is handed off to another live agent or when an agent wraps up the conversation and ends the interaction.

Note: You can also generate a chat summary on demand from the ServiceNow Otto panel. .

The chat summarization skill updates the Short description and Chat Summary fields on the interaction record once the chat is ended.

Before you begin

Role required: admin

Procedure

1. Navigate to **Workspaces** > *CRM Workspace*.
2. In CRM Workspace, open a chat from your inbox.
   The chat summarization skill automatically creates an inline summary in the Active Chat window. This summary includes the constituent's issue, the interaction with the Virtual Agent, and any actions the constituent has taken before engaging with a live agent. This summary appears in the Active Chat window and is identified by the ServiceNow Otto icon (✦) and the **AI chat summary** label.
3. **Optional:** Provide feedback for the chat summary by selecting the helpful icon (👍) or not helpful icon (👎) on the summary card.
   This feedback improves the generative AI model and can help to improve the future versions of this skill. The system gathers the feedback on each generated summary and stores it in the generative AI logs (sys_generative_ai_log_list.do).
4. Chat with the customer to get any additional details about their question or issue.
   For example, if an applicant is applying for a benefit program, you may need to collect additional information from what they provided the Virtual Agent.

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5. In the Active Chat window, use the `/summarize` quick action to summarize the chat during the conversation with the customer.
   The chat summarization skill creates an additional inline summary in the Active Chat window. This is helpful if you want to summarize long or detailed customer conversations.
6. **Optional:** If Live Agent to Live Agent handoff is enabled, transfer a chat to another agent after accepting an incoming chat with the following steps:

   a. Select the Transfer to Agent icon to transfer the interaction to another agent.

   b. Select the name of another live agent.

   c. The second live agent selects **Accept** to join the chat.
   Another summary of the chat is created when the conversation moves from one live agent to another live agent.

7. End the chat conversation by selecting **End Chat**.
   The chat summarization skill updates the **Short description** and **Chat Summary** fields on the interaction record once the chat is ended.

   Note: If a chat summary isn't available for the interaction, the **Chat Summary** field does not appear on the interaction record.

8. Review the text in the **Short description** and **Chat Summary** fields to ensure accuracy, and make any necessary corrections.
9. Select **Save**.

Using AI Search in ServiceNow Otto for Public Sector Digital Services (PSDS)

Agents can search for information with single turn Q&A using the AI Search feature in ServiceNow Otto for Public Sector Digital Services (PSDS).

The ServiceNow Otto in AI Search application uses GenAI to extract actionable Q&A Genius Result answers from the knowledge articles that are found in the Service Portal, Virtual Agent, Employee Center, and global searches. By using this application, an agent can improve the customer's experience by retrieving the relevant content from the knowledge base and generating concise answers. For more information, see ServiceNow Otto for AI Search.

Legislation summarization

The ServiceNow Otto AI Search for CSM Workspace plugin synthesizes and summarizes information from multiple knowledge bases to deliver relevant, actionable AI-generated or AI-selected answers to search queries in a conversational format.

Agents can use AI Search to pose a query directly in the search bar in the CRM Workspace, which will then generate an answer to their question by parsing and summarizing content from one or more knowledge bases. This single-turn, conversational search result replaces a long list of possible matches, and can help improve agent response accuracy and relevancy by allowing agents to review a summary of relevant content before responding to customers.

Search configurations

A search application configuration specifies the search engine and the settings to use for search in a ServiceNow AI Platform application. The **[CSM AIS] Configurable Workspace Search Config** search application configuration is provided with the CSM Configurable Workspace

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store app. To access this configuration, navigate to **AI Search > Search Experience > Search Applications.**

An admin can define and customize the source tables and knowledge bases that the ServiceNow Otto AI Search indexes data from by customizing the search profiles within the search application configuration for ServiceNow Otto for Public Sector Digital Services (PSDS).

For more information on search application configurations, see Search application configurations. For more information on how to set up and customize AI Search for use with ServiceNow Otto for Public Sector Digital Services (PSDS), see Configure AI Search for ServiceNow Otto for Public Sector Digital Services (PSDS).

Use agentic AI in ServiceNow Otto for Public Sector Digital Services (PSDS)

Use standalone agents to achieve specific automated outcomes with the Public Sector Digital Services AI Agent Collection application.

AI Agents are configurable through the AI Agent Studio. The AI Agent Studio is available to administrators as part of the ServiceNow Otto for Public Sector Digital Services (PSDS) offering. The AI Agent Studio allows admins to configure, test, and manage AI agents using natural language and prebuilt workflows. These agents can automate tasks like fee estimation and information request handling.

This table describes the use cases in ServiceNow Otto for Public Sector Digital Services (PSDS).

Use cases powered by Agentic AI in Public Sector Digital Services

Use case	Description
Estimate fee breakdown for an information request	Helps government service agents determine the fee breakdown for an information request by working to arrive at a subtotal fee estimate, a recommendation for whether a fee waiver request should be approved or rejected, including reasons for any rejection, and a total fee estimate, with the fee waiver, if applicable.

Find information such as the Large Language Models (LLM) supported in ServiceNow Otto and security controls that are important considerations for using agentic AI.

Supported Large Language Models

Note:

- You can use Now LLM Service, Azure OpenAI, Google Gemini or Anthropic Claude on AWS as the AI model provider for all generative AI skills and AI agents. Use the Configuration Controls in AI Control Tower to define which options are available, then set the skill-level preferences in the AI Admin Hub console. For more information, see Large language models on the ServiceNow AI Platform.
- For the Now LLM Service updates, see Model provider updates.

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Security implementation considerations

Enable security implementation to execute AI agents and agentic workflows through Access Control Lists (ACLs) and user identities. ACLs provide the Run As capability to let agents and agentic workflows execute actions either as a dynamic user or as an AI user. For more information, see Implement access control in AI agents.

Agentic workflows and their AI agents use role masking to determine which users can access them. Ones installed with your applications have specific roles that come included with the application. If you select *Users with specific roles* for user access, you must configure the security controls to include these roles. For the instructions to change the security controls, see Define security controls for an agentic workflow.

AI agents use role masking to determine which users can access them. Ones installed with your applications have specific roles that come included with the application. If you select *Users with specific roles* for user access, you must configure the security controls to include these roles. For the instructions to change the security controls, see Define security controls for an AI agent.

Considerations for running the autonomous AI Agents

Important: By default, all agent workflow and AI agent records are read-only.

To run the AI agents autonomously, you must first duplicate the agentic workflow, and then proceed with the following steps:

- Activate the agentic workflow.
- Activate all agents within the agentic workflow.
- Activate the trigger to invoke the agentic workflow automatically. The triggers for each agentic workflow must be unique. If you prefer to invoke it manually, activating the trigger isn't necessary.
- Azure OpenAI is recommended for ITSM agentic workflows. For information on Large Language Models (LLMs) for AI agents and agentic workflows, see Large language models on the ServiceNow AI Platform.

Standalone AI agents

There might be AI agents installed on your instance that are not used in agentic workflows. To learn how to see all agents that are available to you, see Find AI agents.

For information on the standalone Public Sector Digital Services AI agents, see Standalone AI Agents in Public Sector Digital Services.

Standalone AI Agents in Public Sector Digital Services

Use standalone agents to achieve specific automated outcomes with the Public Sector Digital Services AI Agent Collection application.

Important: In the **Define availability** screen for the AI agent, make sure that the **Status** field is enabled to activate the AI agent.

The following table describes the available AI agents in the ServiceNow Otto for Public Sector Digital Services (PSDS) application.

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Available standalone AI Agents for the Public Sector Digital Services AI Agent Collection

AI Agent name	Description
Information Request Administration Fee Estimation Agent	• Analyzes fee waiver justification from applicant for an information request case record, and validates justification against predefined rules • Outlines the steps required to estimate the fees associated with an information request • Retrieves similar case records and allows user to exclude any from the fee calculation • Estimates and communicates fee breakdown associated with an information request case record based on similar request queries and request details from the user • Communicates sub-total estimate, fee waiver recommendation, and total with fee waiver.

Note: Verify that AI Search is enabled on the instance before configuring the agents.

There might be AI agents installed on your instance that are not used in agentic workflows. To learn how to see all agents that are available to you, see Find AI agents.

Note:

You can use Now LLM Service, Azure OpenAI, Google Gemini or Anthropic Claude on AWS as the AI model provider for all generative AI skills and AI agents. Use the Configuration Controls in AI Control Tower to define which options are available, then set the skill-level preferences in the AI Admin Hub console. For more information, see Large language models on the ServiceNow AI Platform.

Enable security implementation to execute AI agents and agentic workflows through Access Control Lists (ACLs) and user identities. ACLs provide the Run As capability to let agents and agentic workflows execute actions either as a dynamic user or as an AI user. For more information, see Implement access control in AI agents

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To run the AI agents autonomously, you must first duplicate the agentic workflow, and then proceed with the following steps:

- Activate the agentic workflow.
- Activate all agents within the agentic workflow.
- Activate the trigger to invoke the agentic workflow automatically. The triggers for each agentic workflow must be unique. If you prefer to invoke it manually, activating the trigger isn't necessary.
- Azure OpenAI is recommended for ITSM agentic workflows. For information on Large Language Models (LLMs) for AI agents and agentic workflows, see Select the LLM for AI agents and agentic workflows.

For more information on configuring AI Agents, see Activate an AI Agent in Public Sector Digital Services AI Agent Collection.

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