OHACTS
User's Manual

Office of Hearings and Appeals Case Tracking System (OHACTS)

U.S. Small Business Administration

Version Number 1.2

October 2009

I have carefully reviewed and accept the version of this document. This document has been completed in accordance with the requirements of the SBA System Development Methodology.

Samantha Y. Wiggins	Date
Hong H. Tong	Date
Barbara S. Brown	Date

Revision History

Version No.	Date	Revision Description
1.0	05/2008	Initial Release
1.1	04/2009	Help document has been adjusted based on the requirements (SR #20090119)
1.2	10/2009	Added “Attorney Name” as a new column to the following reports: Close, Judge, OHACTS, and Pending. Added a new Attorney report.

Minor revisions can be made by the author. Otherwise, approval is required for all other changes made to this document. Version number for minor revisions is of the form ***n.m*** and ***n.0*** for major revisions.

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1.0 GENERAL INFORMATION

1 General Information

1.1 Background

The OHA Case Tracking System (OHACTS) was developed for use by the Office of Hearings and Appeals for tracking cases and appeals in a number of jurisdictional areas. The major application is used primarily by clerks, attorneys, and judges. Using this system, users will be able to search, add or modify any specific case as well as produce various reports.

Broadly speaking, the Office of Hearings and Appeals hears and issues judgments in the following kinds of cases:

- Cases disputing the proposal and/or awards based on size requirements.
- Cases disputing the NAICS code for the proposal and/or award.
- Cases disputing other administrative issues.

Major functions performed by the system are:

- Adding a new case
- Searching for and updating an existing case
- Producing various reports
- Maintaining various code tables

1.2 Project References

- Data Requirements Document
- Database Specifications
- Functional Requirements Document
- Maintenance Manual
- On-Line Help
- OISS Look and Feel
- Project Management Plan
- SBA Coldfusion Standards Document
- Systems Specifications
- System Test Plan

1.3 Authorized Use Permission

This is a Federal computer system and is the property of the United States Government. It is for authorized use only. Users (authorized or unauthorized) have no explicit or implicit expectation of privacy in anything viewed, created, downloaded, or stored on this system, including e-mail, Internet, and Intranet use. Any or all uses of this system (including all peripheral devices and output media) and all files on this system may be intercepted, monitored, read, captured, recorded, disclosed, copied, audited, and/or inspected by authorized Small Business personnel, as well as authorized officials of other agencies, both domestic and foreign. Unauthorized use of, or exceeding authorized access to, this system is prohibited and may constitute a violation of 18 U.S.C. § 1030 or other Federal laws and regulations and may result in criminal, civil, and/or administrative action. By using this system, users indicate awareness of, and consent to, these terms and conditions and acknowledge that there is no reasonable expectation of privacy in the access or use of this computer system.

1.4 Points of Contact

1.4.1 Information

Contact Name	Department/Division	Telephone Number	E-Mail Address
Barbara Brown	OISS	(703) 487-9275	Barbara.Brown@sba.gov
Hong Tong	OISS	(703) 487-9274	Hong.Tong@sba.gov

1.5 Terms and Abbreviations

Appellant – Plaintiff who filed the case.
Archival Information – Date the documents were archived, box numbers where actual archived documents are stored, and date the documents were destroyed.
Challenger – Entity who challenges the award.
Congressman or Congresswoman – Congressman or Congresswoman of the party that submits any inquiry related to the case.
CTS – Case Tracking System
Decision – Decision of the Judge, date of the decision, and name of the judge who made the decision.
NAICS – North American Industry Code Standard
OHA – Office of Hearings and Appeals
Other Interested Party – Other entities that are interested in the case.
Protestor – Entity who protests the challenge.

2.0 SYSTEM SUMMARY

2 System Summary

2.1 System Configuration

The application is developed for use with a minimum browser of Microsoft IE 6.0 or a compatible browser. You must use high level encryption (128 bit) when configuring your browser. You must enable support for JAVA script and applets. There is no use of client side COOKIES. In general, the font type is 9pt. Arial-style sheets are not used. The application is best viewed on an 800 x 600 resolution screen. To avoid scrolling, use a minimum 15” screen.

2.2 Data Flows

- Docket Clerks will input new Cases through the Web-based data entry screens based on an appellant’s complaint.
- As the case progresses, the Docket Clerk will input/update the data based on the information supplied by Judges and the parties of the case.
- Judges will input their comments based on the facts of the case and their thought process.
- Docket Clerk will update the Archival information from SBA Form 1474.

2.3 User Access Levels

Various levels of system security are available to access OHACTS. Security roles have been defined based on the roles of the existing using community. Following are the roles that have been defined for OHACTS:

Read-Only (ATTORNEY READ)

The attorney will have the ability to generate reports and view all information about the case including the judge’s comments.

This role cannot access the Code Maintenance module and has no update capability.

Docket Clerk (CLERK UPDT)

The clerk has the ability to generate reports as well as to enter all information pertaining to a case.

The clerk also has the ability to modify all case information, with the exception of comments made by the judge.

This role cannot access the Code Maintenance module.

Judge (JUDGE UPDT) Note: this role is not currently in use.

The judge has the ability to review case information as well as enter/update comments and generate reports.

This role cannot modify case information or access the Code Maintenance module.

Administator (ADMIN UPDT)

The Administrator can generate reports as well as enter and modify all case information with the exception of comments made by the judge.

The administrator has exclusive access to the Code Maintenance module.

2.4 Contingencies and Alternate Modes of Operation

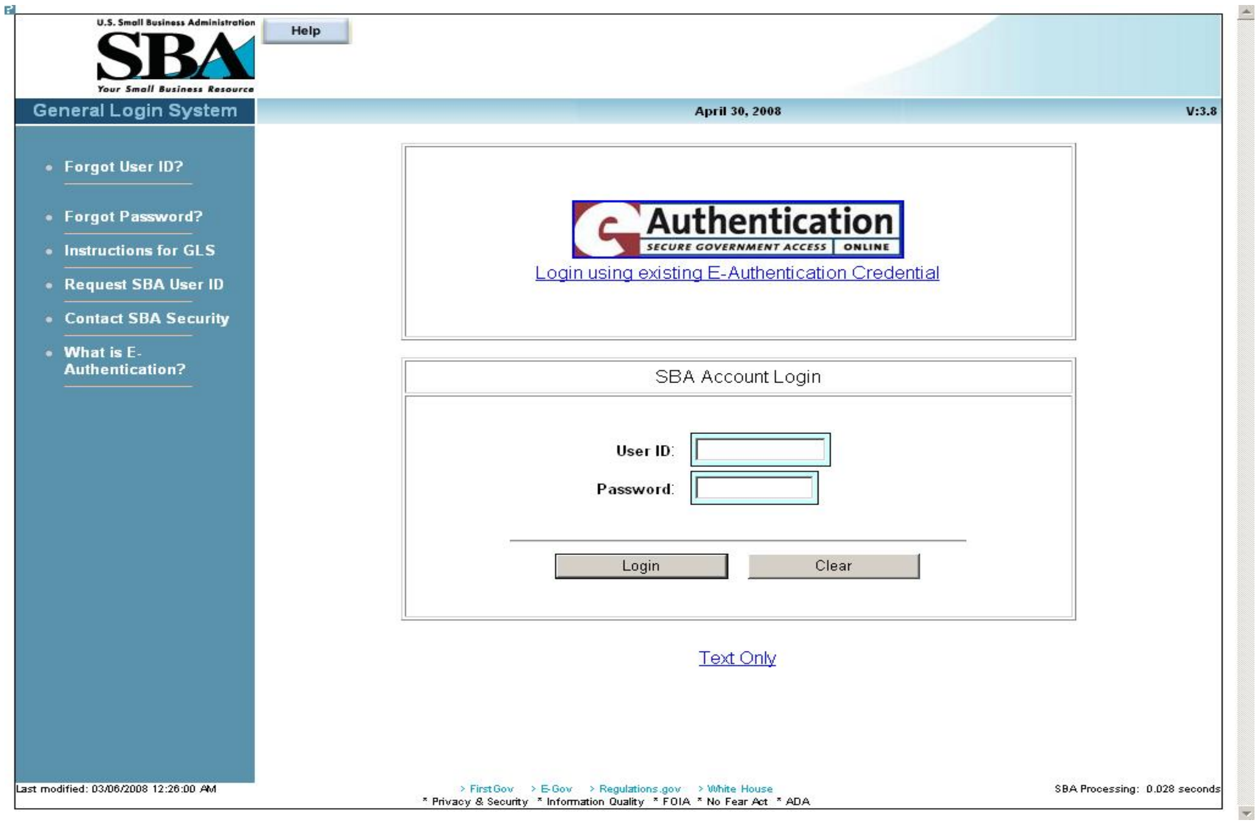
Refer to the Disaster Recovery Plan.

3.0 GETTING STARTED

3 Getting Started

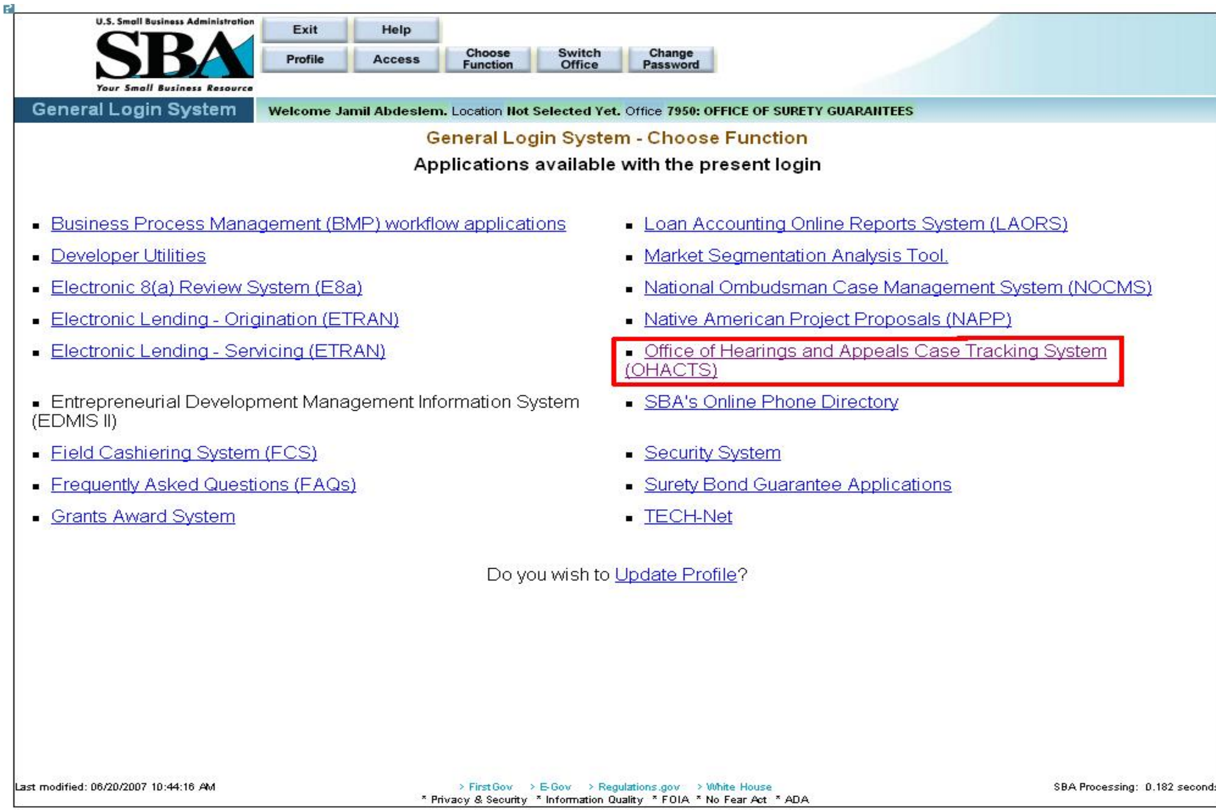
3.1 Logging In

Connect to the Internet and enter https://eweb.sba.gov/gls/dsp_login.cfm as the URL. You will be presented with the General Log-In screen. Enter the User ID and Password provided to you by the Small Business Administration's Security Officer.



3.1.1 Choose Function

You will be presented with the General Login System Choose Function Menu. Choose OHACTS (outlined in red, for clarity) from the menu.



4.0 Using the System (Online)

4 Using the System (Online)

After clicking on the “Office of Hearings and Appeals Case Tracking System” (OHACTS) link on the ***Choose Function*** screen, you will be presented with the screen depicted below:

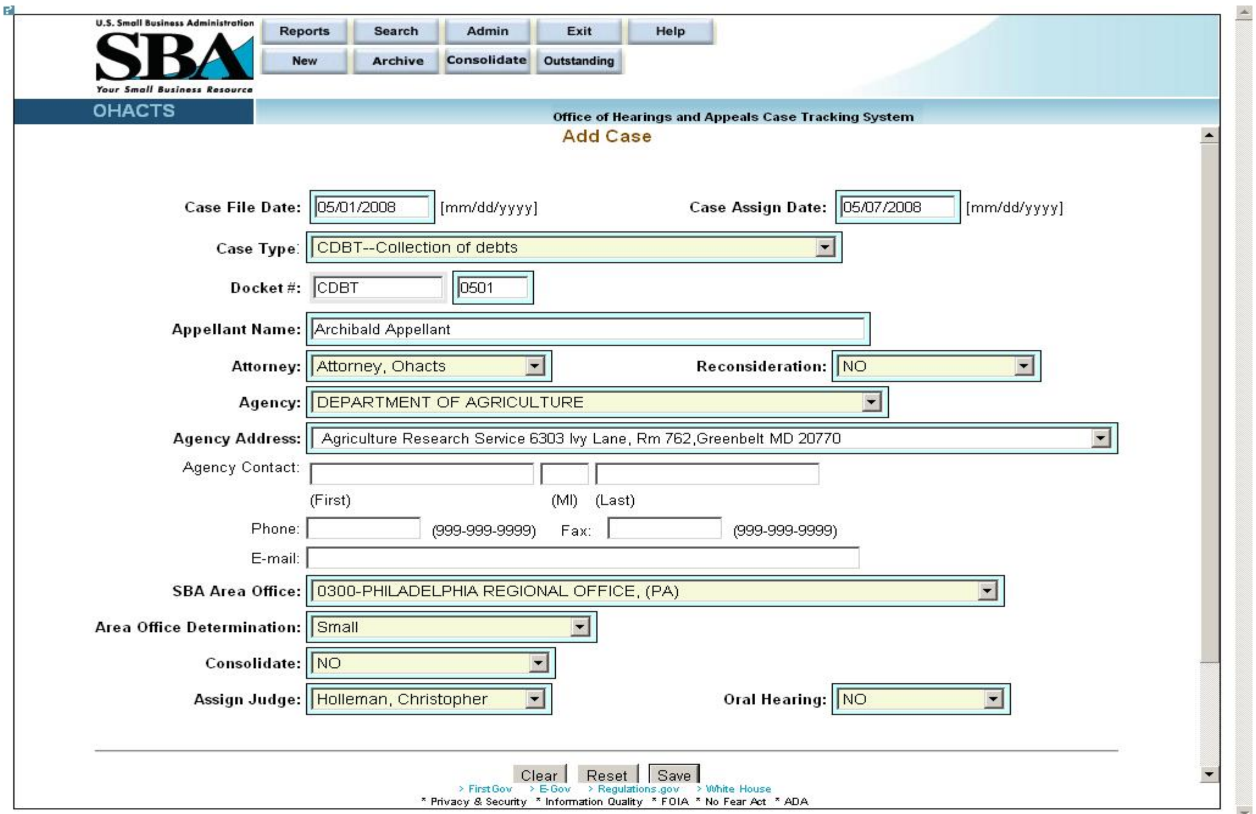
Docket #	Appellant	Attorney	File Date	Assign Date	Judge
1002-20040405-0001	test	Bradbury, Ann	04/05/2004	04/05/2004	Blacken, Emma
1002-20071201-0001	QA Test		12/01/2007	12/02/2007	Judge, Ohacts
1111-20071201-0001	kjlkj	Admin, Ohacts	12/01/2007	12/03/2007	Judge, Ohacts
APPR-19900101-0001	asad		01/01/1990	01/01/1991	Mitnick, Mona
APPR-20030101-0003	ASAD		01/01/2003	01/01/2003	Mitnick, Mona
APPR-20031106-0001	Asad		11/06/2003	11/06/2003	Mitnick, Mona
APPR-20031106-0002	Asad		11/06/2003	11/06/2003	Mitnick, Mona
APPR-20080101-1101	Asad Chaklader	Appover, John	01/01/2008	01/01/2008	Litt, Nahum
APPR-20080507-1122	Demo Appellant	Attorney, Ohacts	05/07/2008	05/07/2008	Litt, Nahum
BDPE-20011203-0021	Woroco International		12/03/2001	12/03/2001	Blacken, Emma
BDPE-20020329-0008	D.L. King & Associates, Inc.		03/29/2002	04/01/2002	Blacken, Emma
BDPE-20080508-1545	Hello Hello	Admin, Ohacts	05/08/2008	05/08/2008	Lewis, Deborah
BDPE-20080509-1234	test on 05/09/2008	Holleman, Christopher	05/09/2008	05/09/2008	Lewis, Deborah
BDPS-19990101-0013	sdfsadfas	Admin, Ohacts	01/01/1999	01/01/2000	Cole, Michael
BDPS-19990101-0015	asdf		01/01/1999	01/01/2000	Blazsik, Gloria
BDPS-20010101-0022	test		01/01/2001	01/01/2001	Blazsik, Gloria
BDPS-20080508-4242	Hello Hello	Approver, Test	05/08/2008	05/08/2008	Cole, Michael
BDPT-19950102-0001	ASAD	Appover, John	01/02/1995	05/06/1996	Cole, Michael
BDPT-20080101-1122	ASad	Admin, Ohacts	01/01/2008	01/01/2008	Cole, Michael
BDPT-20080508-3214	George	Admin, Ohacts	05/08/2008	05/08/2008	Cole, Michael

Definition of Terms on Outstanding Case List Screen

1. Docket # – This column displays the docket number. Click on a link in this column to go to the ***Case Detail*** screen where you will be able to view details of this particular case as well as edit a few fields. Clicking on “Docket #” will sort the cases in alphabetical order.
2. Appellant – This column displays the names of the appellants. Clicking on “Appellant” will sort the names in alphabetical order.
3. Attorney – This column displays the names of the attorneys. Clicking on “Attorney” will sort the names in alphabetical order.
4. File Date – This column displays the file date. Clicking on “File Date” will sort the dates in descending order (the most recent date will appear at the top).
5. Assign Date – This column displays the assign date. Clicking on “Assign Date” will sort the dates in descending order (the most recent date will appear at the top).
6. Judge – This column displays the name of the judge assigned to the case. Clicking on “Judge” will sort the names in alphabetical order.

5 New

– Click on this pushbutton to access the ***Add Case*** screen where you will be able to create a new case.



Definition of Terms on Add Case Screen

1. **Case File Date** – Enter the date on which the case was filed.
2. **Case Assign Date –** Enter the date on which the case was assigned. Note: this date must be ***later*** than the "Case File Date".
3. **Case Type –** Use the drop-down list to select the case type.
4. **Docket # –** Enter the docket number. Note: The greyed-out field to the left is made up of two parts: the first part is the selection that you made in the "Case Type" drop-down list and the second part is made up of the date that you entered in the "Case File Date" field.
5. **Appellant Name –** Enter the name of the appellant.
6. **Attorney –** Use the drop-down list to select the attorney.
7. **Reconsideration –** Use the drop-down list to select either "Yes" or "No".
8. **Agency –** Use the drop-down list to select the agency.
9. **Agency Address –** Use the drop-down list to select the agency address.
10. Agency Contact – Enter the first name, middle initial (if applicable), and the last name of the agency contact.
11. Phone – Enter the contact's phone number.
12. Fax – Enter the contact's fax number.

13. E-mail – Enter the contact’s phone number.
14. **SBA Area Office** – Use this drop-down list to select the SBA area office. Note: This field will appear ***only*** when you select one of the following in the “Case Type” field above: “Size”, “NACS”, or “CDBT”.
15. **Area Office Determination –** Use this drop-down list to specify the area office determination (e.g. “Small”, “Other Than Small”). Note: This field will appear ***only*** when you select one of the following in the “Case Type” field above: “Size”, “NACS”, or “CDBT”.
16. **Consolidate –** Use the drop-down list to indicate whether or not you wish to consolidate this case with another one. **Note**: you can only consolidate ***open*** cases having the ***same case code*** and the ***same agency***.
17. **Assign Judge** – Use the drop-down list to select the judge that was assigned to the case.
18. **Oral Hearing** – Use the drop-down list to select either “Yes” or “No”.

Clear **–** Click on this pushbutton to delete an entry. This will clear all the fields on the screen.

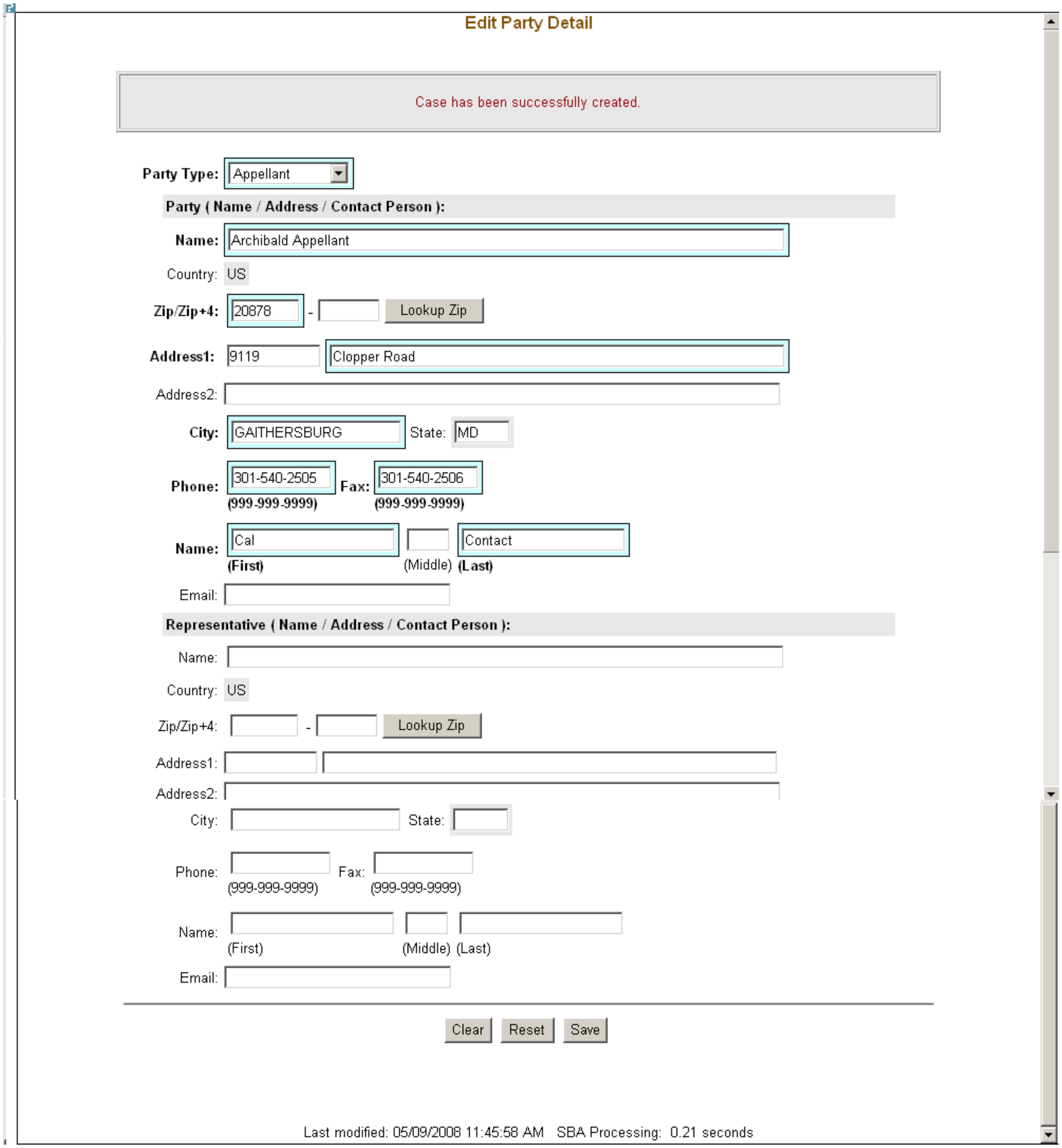
Reset – Click on this pushbutton to reset all the fields to their original values.

Save – Click on this pushbutton to save the information on the screen to the database. The system will then return the following message: “Case has been successfully created” at the top of the following screen (***Edit Party Detail***).

5.1 Edit Party Detail

This screen is accessed upon selecting the Save pushbutton in the screen above (***Add Case***) or the Parties link in the left-hand navigation tree.

Use this screen to add additional supporting information regarding parties, their contacts, and their representatives.


Edit Party Detail

Case has been successfully created.

Party Type: Appellant

Party (Name / Address / Contact Person):

Name: Archibald Appellant

Country: US

Zip/Zip+4: 20878 - Lookup Zip

Address1: 9119 Clopper Road

Address2:

City: GAITHERSBURG State: MD

Phone: 301-540-2505 (999-999-9999) Fax: 301-540-2506 (999-999-9999)

Name: Cal (First) (Middle) Contact (Last)

Email:

Representative (Name / Address / Contact Person):

Name:

Country: US

Zip/Zip+4: - Lookup Zip

Address1:

Address2:

City: State:

Phone: (999-999-9999) Fax: (999-999-9999)

Name: (First) (Middle) (Last)

Email:

Clear Reset Save

Last modified: 05/09/2008 11:45:58 AM SBA Processing: 0.21 seconds

Definition of Terms on Edit Party Detail Screen

Party Type – Use the drop-down list to select the party type.

Party (Name/Address/Contact Person)

1. **Name –** Enter the name of the concerned party.
2. Country – This read-only field will display "US" for domestic addresses.
3. **Zip/Zip+4 –** Enter the zip code.
4. Lookup Zip – Select this pushbutton to automatically populate the "City" and "State" fields.
5. **Address 1 –** Enter the first line of the address.
6. Address 2 – Enter the second line of the address.
7. **City** – Enter the name of the city if it is not already displayed.
8. State – This read-only field displays the name of the state.
9. **Phone** – Enter the phone number.
10. **Fax** – Enter the fax number.
11. **Name** (First, Middle, Last) – Enter the first name, middle initial (if applicable), and the last name of the contact person.
12. E- Mail – Enter the e-mail of the contact.

Representative (Name/Address/Contact Person)

1. Name – Enter the name of the representative.
2. Country – This read-only field will display "US" for domestic addresses.
3. Zip/Zip+4 – Enter the zip code.
4. Lookup Zip – Select this pushbutton to automatically populate the "City" and "State" fields.
5. Address 1 – Enter the first line of the address.
6. Address 2 – Enter the second line of the address.
7. City – Enter the name of the city if it is not already displayed.
8. State – This read-only field displays the name of the state.
9. Phone – Enter the phone number.
10. Fax – Enter the fax number.
11. Name (First, Middle, Last) – Enter the first name, middle initial (if applicable), and the last name of the representative.
12. E- Mail – Enter the e-mail of the representative.

Clear **–** Click on this pushbutton to delete an entry. This will clear all the fields on the screen.

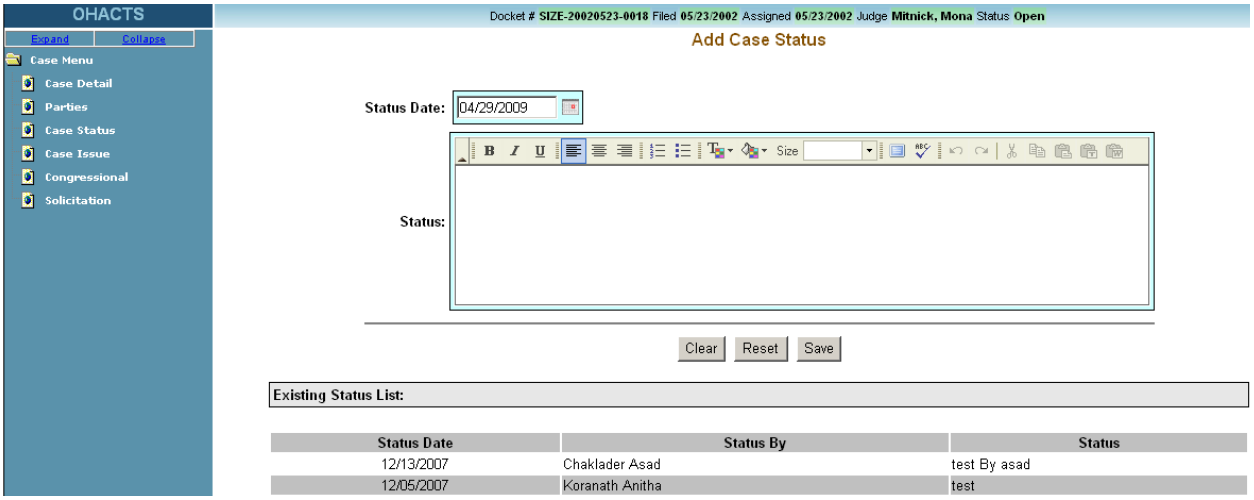
Reset – Click on this pushbutton to reset all the fields to their original values.

Save – Click on this pushbutton to save the information on the screen to the database. The system will then return the following message: "Party Information has been successfully updated" at the top of the following screen (***Add Case Status***).

5.2 Add Case Status

This screen is accessed upon selecting the Save pushbutton in the screen above (***Edit Party Detail***) or the Case Status link in the left-hand navigation tree.

Use this screen to enter case status remarks.



Definition of Terms on Add Case Status Screen

1. Status Date – This read-only field displays today's date by default.
2. **Status** – Enter the case status in this field.

Clear **–** Click on this pushbutton to delete an entry. This will clear all the fields on the screen.

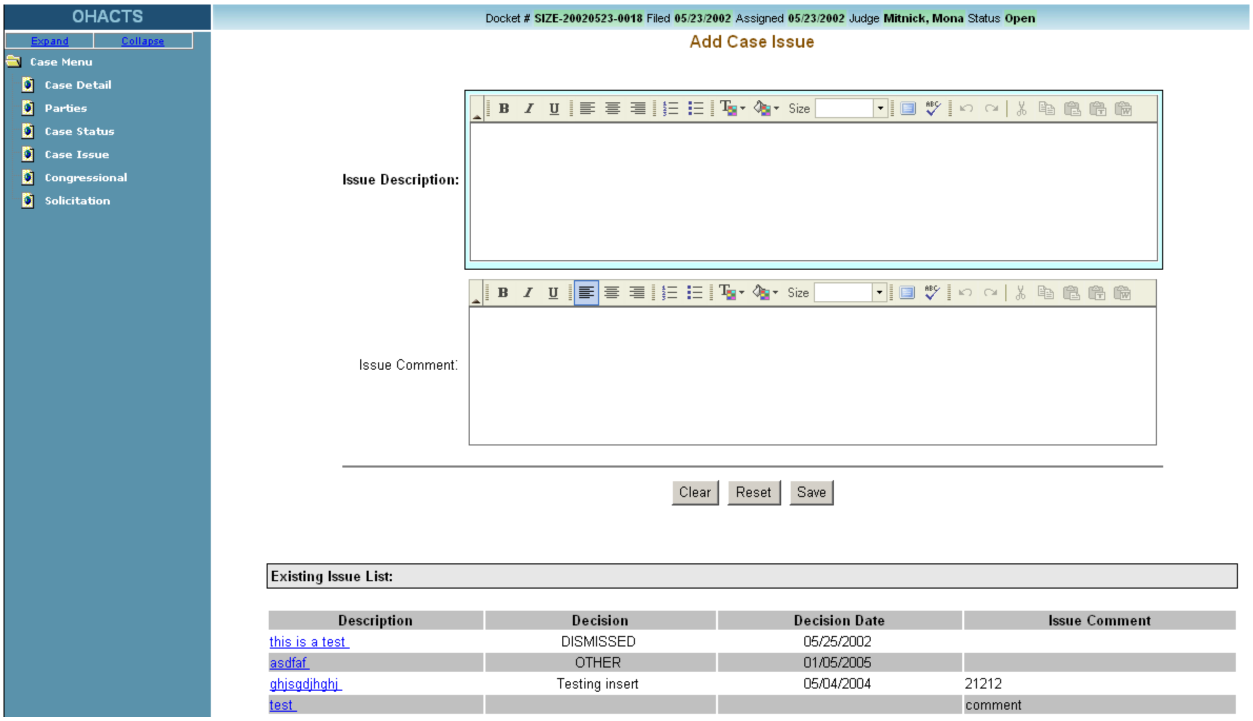
Reset – Click on this pushbutton to reset all the fields to their original values.

Save – Click on this pushbutton to save the information on the screen to the database. The system will then return the following message: "Case Status Information has been successfully saved" at the top of the following screen (***Add Case Issue***).

5.3 Add Case Issue

This screen is accessed upon selecting the Save pushbutton in the screen above (***Add Case Status***) or the Case Issue link in the left-hand navigation tree.

Use this screen to enter a description of the issue or to enter a comment on the issue.



Definition of Terms on Add Case Issue Screen

1. **Issue Description –** Enter a description of the issue in this field.
2. Issue Comment – Enter a comment on the issue in this field.

Clear – Click on this pushbutton to delete an entry. This will clear all the fields on the screen.

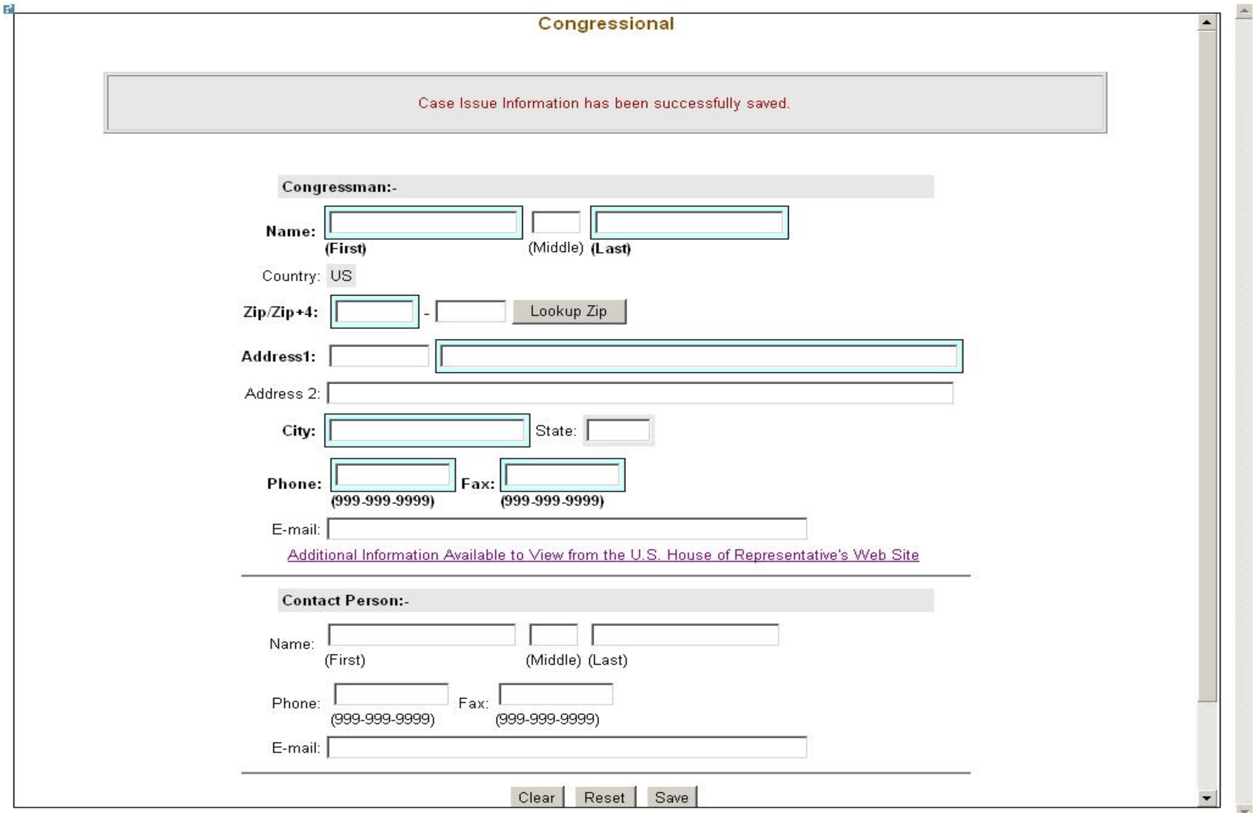
Reset – Click on this pushbutton to reset all the fields to their original values.

Save – Click on this pushbutton to save the information on the screen to the database. The system will then return the following message: “Case Issue Information has been successfully saved” at the top of the following screen (***Congressional***).

5.4 Congressional

This screen is accessed upon selecting the Save pushbutton in the screen above (***Add Case Issue***) or the Congressional link in the left-hand navigation tree.

Use this screen to enter the contact information for a congressman as well as for a contact person.



Definition of Terms on Congressional Screen

Congressman:

1. **Name –** Enter the first, middle (if applicable), and last name of the congressman.
2. Country – This read-only field will display "US" for domestic addresses.
3. **Zip/Zip+4 –** Enter the zip code.
4. Lookup Zip – Select this pushbutton to automatically populate the "City" and "State" fields.
5. **Address 1 –** Enter the first line of the address.
6. Address 2 – Enter the second line of the address.
7. **City** – Enter the name of the city if it is not already displayed.
8. State – This read-only field displays the name of the state.
9. **Phone** – Enter the phone number.
10. **Fax** – Enter the fax number.
11. E-mail – Enter the e-mail.

Additional Information Available to View from the U.S. House of Representative's Web Site – Click on this web link to access the U.S. House of Representatives web site to view additional information.

Contact Person

1. Name – Enter the first, middle (if applicable), and last name of the contact person.
2. Phone – Enter the phone number.
3. Fax – Enter the fax number.
4. E- Mail – Enter the e-mail.

Clear – Click on this pushbutton to delete an entry. This will clear all the fields on the screen.

Reset – Click on this pushbutton to reset all the fields to their original values.

Save – Click on this pushbutton to save the information on the screen to the database. The system will then return the following message: “Congressional Information has been successfully saved” at the top of the following screen (***Solicitation List***).

5.5 Solicitation List

This screen is accessed upon selecting the Save pushbutton in the screen above (***Congressional***) or the Solicitation link in the left-hand navigation tree.

Use this screen to view a list of existing bid solicitations.

The screenshot below depicts no solicitations.

The screenshot below depicts an existing solicitation.

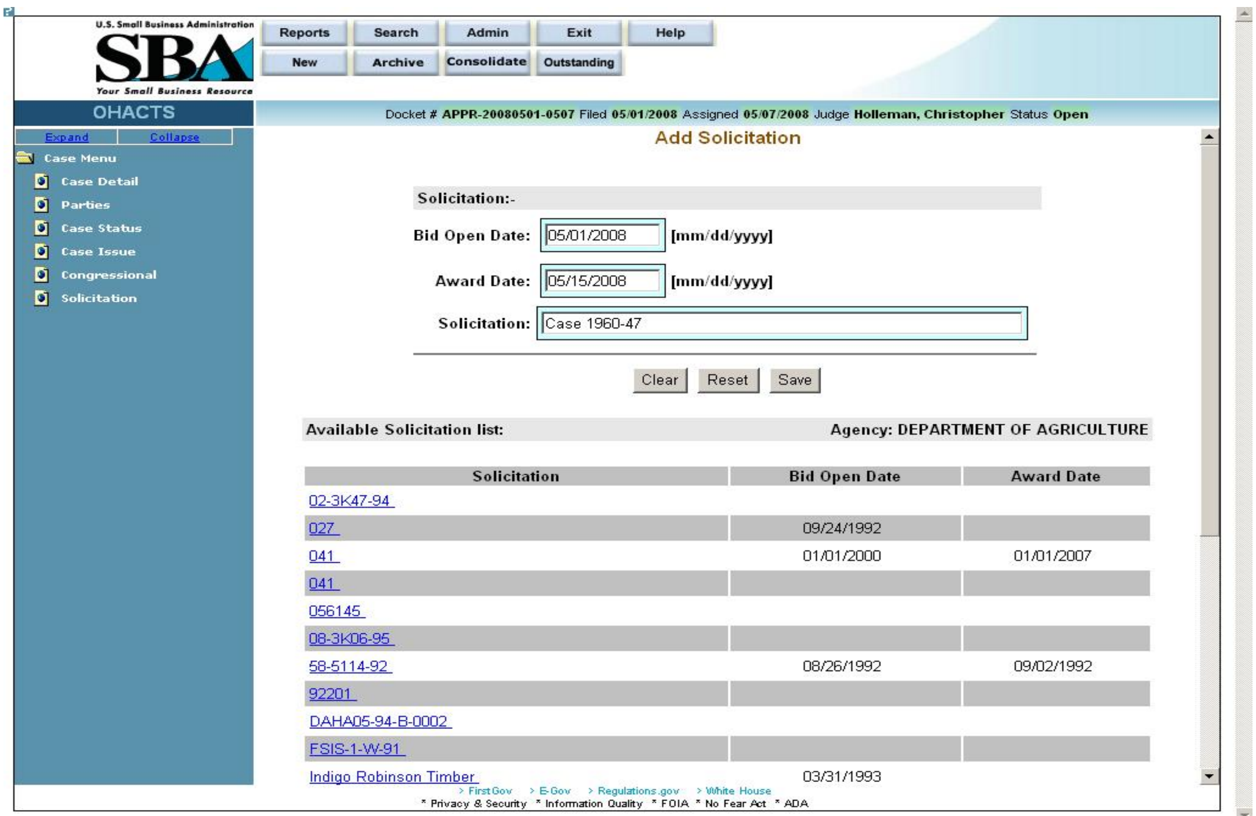
Description of Terms on Solicitation List Screen

1. Solicitation – This column displays the current solicitations. Click on a link in this column to go to the ***Edit Solicitation*** screen to make edits on solicitations.
2. Bid Open Date – This read-only column displays the date on which the bid was opened.

3. Award Date – This read-only column displays the date on which the bid was awarded.
4. Add New – Click on this pushbutton to go to the ***Add Solicitation*** screen where you can enter more solicitations.

5.5.1 Add Solicitation

This screen is accessed upon selecting the Add New pushbutton in the screen above (***Solicitation*** screen). Use this screen to add an additional solicitation.



Description of Terms on Add Solicitation Screen

Solicitation:

1. Bid Open Date – Enter the date on which the bid was opened.
2. Award Date – Enter the date of the award.
3. Solicitation – Enter a description of the solicitation.

Clear **–** Click on this pushbutton to delete an entry. This will clear all the fields on the screen.

Reset – Click on this pushbutton to reset all the fields to their original values.

Save – Click on this pushbutton to save the information on the screen to the database. The system will then return the following message: “Information has been successfully saved” at the top of the following screen (***Solicitation List***).

The screenshot below depicts a successful save from the ***Add Solicitation*** screen above.

6 Reports

Access this module by selecting the  pushbutton from the top menu.

The Reports Module contains the following reports in .PDF format:

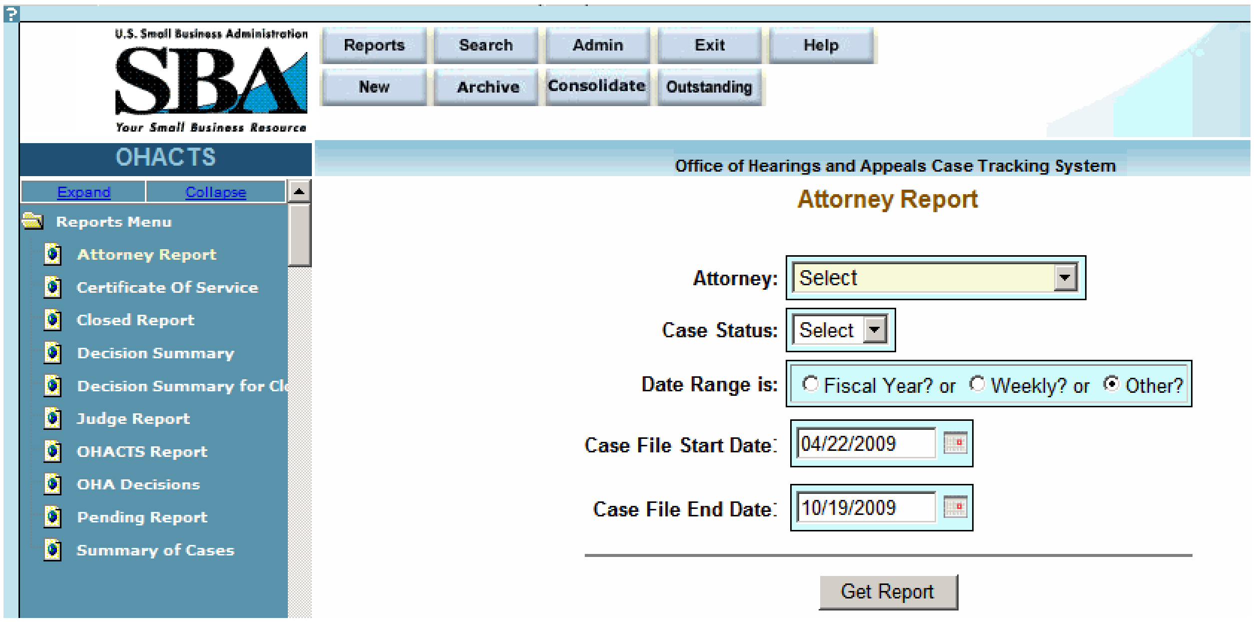
- Attorney Report
- Certificate of Service
- Closed Report
- Decision Summary
- Decision Summary for Closed Cases
- Judge Report
- OHACTS Report
- OHA Decisions
- Pending Report
- Summary of Cases

Note: On certain reports, the name of the column will appear in **blue**. This means when you place your cursor on it while pressing on the “Ctrl” key on your keyboard and click, the items in that column will be sorted in a particular order.

6.1 Attorney Report

Access this screen by clicking on the **Attorney Report** link in the left-hand navigation tree.

Use this screen to specify the following parameters that you wish to see on the report: attorney, case status, date range, and case file start/end dates.



Definition of Terms on Attorney Report

1. **Attorney –** Use the drop-down list to select either "All" attorneys or a specific attorney. **Note:** If "All" is selected, all the cases of each attorney will display together.
2. **Case Status –** Use the drop-down list to select a case status (i.e., "All", "Open", or "Closed".
3. **Date Range is –** Click on a radio button to specify the date range. **Note:** If you click on "Other", then you must populate the "Case File Start Date" and "Case File End Date" fields by either entering the dates or using the calendar icons.
4. **Case File Start Date –** This field populates with 10/01/current fiscal year if the "Fiscal Year" radio button was clicked in "Date Range" above. This field populates with the previous Friday date ***before*** the "Case File End Date" field if the "Weekly" radio button was clicked in "Date Range" above.
5. **Case File End Date –** This field populates with 09/30/current fiscal year if the "Fiscal Year" radio button was clicked in "Date Range" above. This field populates with the previous Friday date if the "Weekly" radio button was clicked in "Date Range" above. (If the current date is a Friday, that date will populate the "Case File End Date" field.)

Get Report – Click on this pushbutton to access the ***Attorney Report*** screen depicted below.

Office of Hearings and Appeals
Attorney Report

Report Date:10/19/2009
Case Filed Within: 10/19/2007 and 10/19/2009
Attorney: All
Case Status:All

Admin, Ohacts:

Docket #	Appellant	Judge	Case Type	Filed Date	Decision Date	Days Open	Days Pending	Case Status
1111-20071201-0001	kjlkj	Judge, Ohacts	1111	12/01/2007	10/01/2008	211		Closed
AHHS-20080507-0003	Test Appellant	Mitnick, Mona	AHHS	05/07/2008	02/04/2008	0		Closed
APPR-20090428-0008	Test	Aeddy, Praveen	APPR	04/28/2009			121	Open
APPR-20090429-1243	Test By ASad	Aeddy, Praveen	APPR	04/29/2009			120	Open
BDPE-20080508-1545	Hello Hello	Lewis, Deborah	BDPE	05/08/2008	10/07/2008	106		Closed
BDVP-20080605-4545	jkjkj	Cole, Michael	BDVP	06/05/2008	10/01/2008	83		Closed
CDBT-20080101-0001	ugujh	Blazsik, Gloria	CDBT	01/01/2008	01/01/2008	0		Closed
NACS-20071231-0006	qa test	Judge, Ohacts	NACS	12/31/2007	02/11/2009	281		Closed
SDBA-20080101-1111	Asad	Blazsik, Gloria	SDBA	01/01/2008			453	Open
SIZE-20080513-0001	Test	Aeddy, Praveen	SIZE	05/13/2008	05/13/2008	1		Closed
WWWW-20081031-1234	Test Appellant	Judge, Ohacts	WWWW	10/31/2008			242	Open
WWWW-20081208-0001	QAQC	Judge, Ohacts	WWWW	12/08/2008	12/11/2008	4		Closed

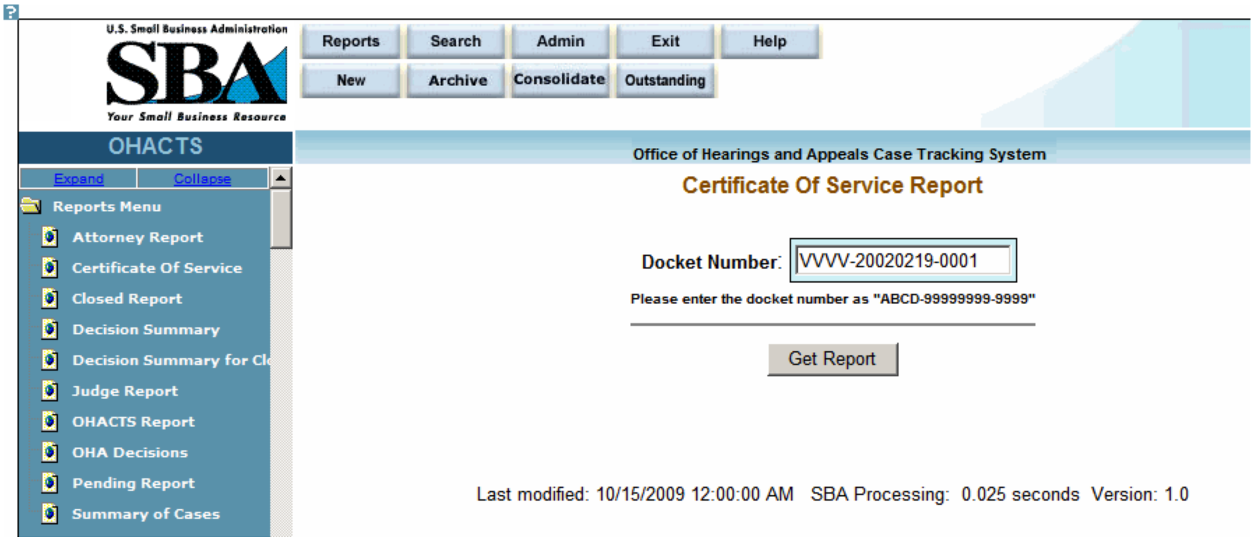
Description of Fields on Attorney Report PDF

1. Docket # – This column displays the docket number. Click on "Docket Number" to sort the cases by alphabetical order.
2. Appellant – This column displays the name of the appellant associated with the case. Click on "Appellant" to sort the names by alphabetical order.
3. Judge – This column displays the name of the judge associated with the case. Click on "Judge" to sort the names by alphabetical order.
4. Case Type – This column displays the case type. Click on "Case Type" to sort the cases in ascending order.
5. Filed Date – This column displays the dates on which the cases were filed. Click on "File Date" to sort the cases by chronological order, with the oldest dates appearing first.
6. Decision Date – This column displays the decision dates. Click on "Decision Date" to sort the dates by chronological order, with the oldest dates appearing first.
7. Days Open – This column displays the days open. Click on "Days Open" to sort the data in ascending order.
8. Days Pending – This column displays the number of days pending. Click on "Days Pending" to sort the data in ascending order.
9. Case Status – This column displays the case status. Click on "Case Status" to first display the "Open" cases and then the "Closed" cases.

6.2 Certificate of Service Report

Access this screen by clicking on the Certificate Of Service link in the left-hand navigation tree.

This report contains contact information for the parties and agencies involved.



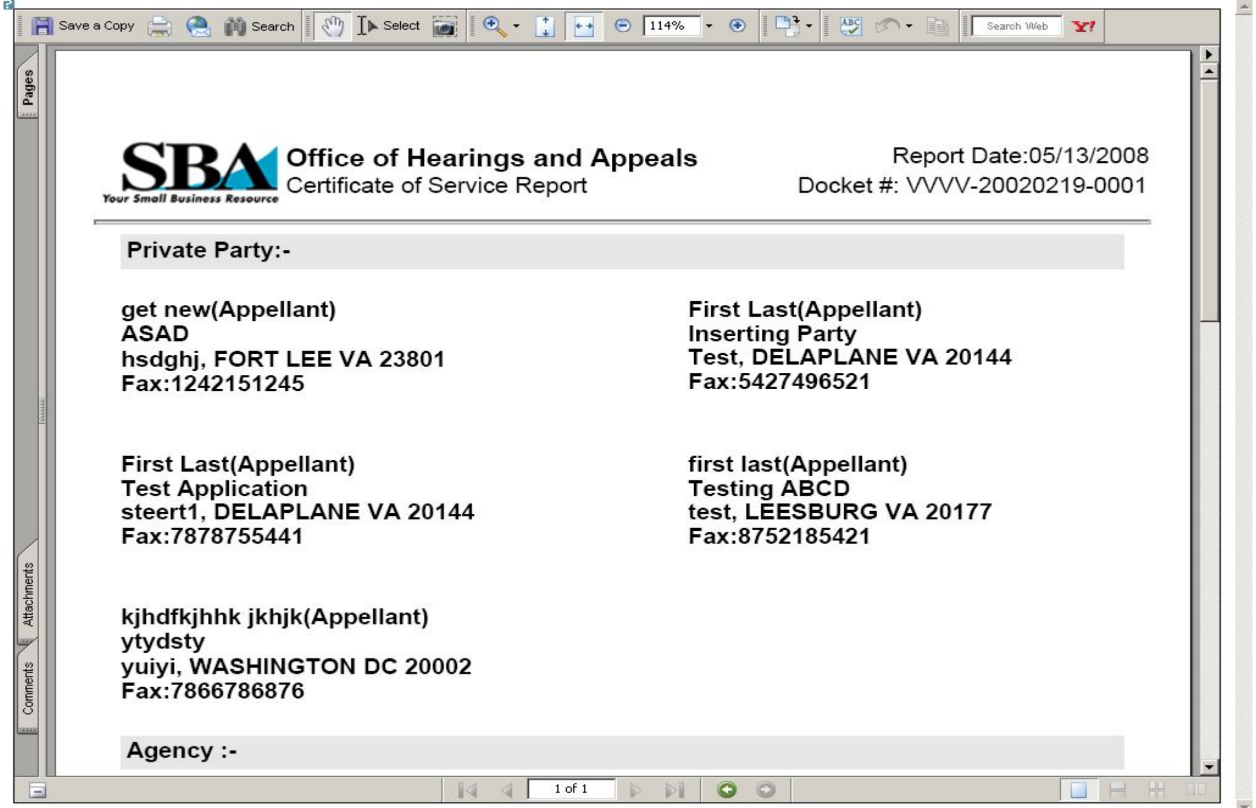
Definition of Terms on Certificate of Service Report

Docket Number – Enter the case docket number. Note: do not include any hyphens.

Get Report – Click on this pushbutton to access the ***Certificate of Service Report*** screen depicted below.

Note: all the fields on this report are display-only.

Certificate of Service Report PDF


Office of Hearings and Appeals
Certificate of Service Report

Report Date:05/13/2008
Docket #: VVVV-20020219-0001

Private Party:-

get new(Appellant)
ASAD
hsdghj, FORT LEE VA 23801
Fax:1242151245

First Last(Appellant)
Inserting Party
Test, DELAPLANE VA 20144
Fax:5427496521

First Last(Appellant)
Test Application
steert1, DELAPLANE VA 20144
Fax:7878755441

first last(Appellant)
Testing ABCD
test, LEESBURG VA 20177
Fax:8752185421

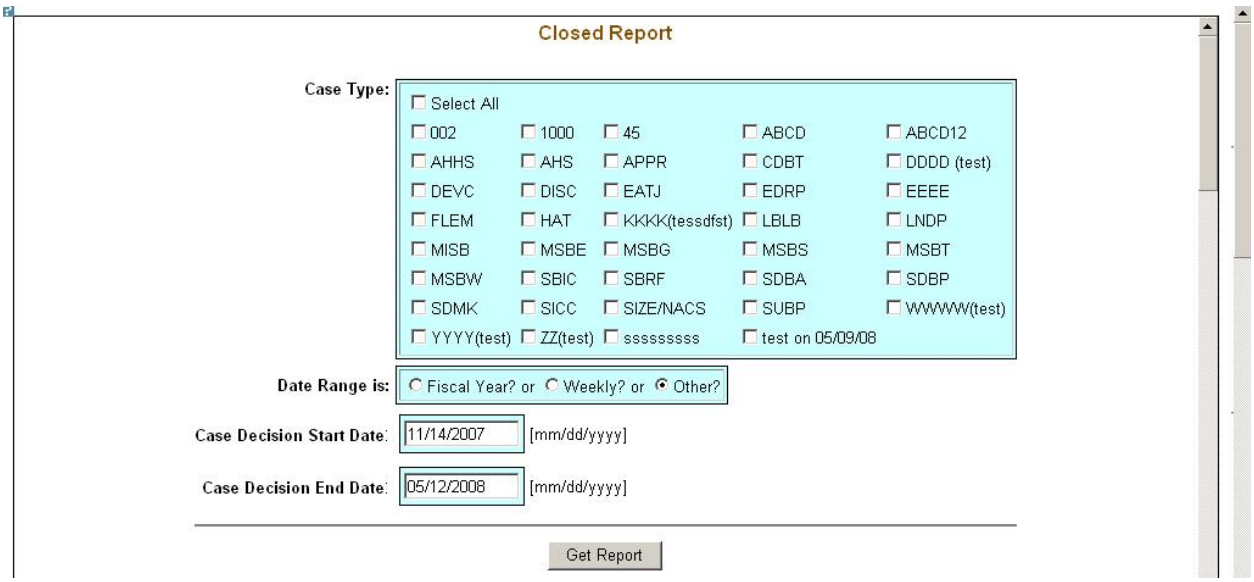
kjhdfkjhhk jkhjk(Appellant)
ytydsty
yuiyi, WASHINGTON DC 20002
Fax:7866786876

Agency :-

6.3 Closed Report

Access this screen by clicking on the **Closed Report** link in the left-hand navigation tree.

Use this screen to specify the parameters of the report (e.g. “Case Type”, “Date Range”, etc.)



Definition of Terms on Certificate of Service Report

1. **Case Type** – Select the checkbox(es) of the particular case type(s) that you wish to see on the report. Select the “Select All” checkbox if you wish to include them all.
2. **Date Range is** – Select the radio button of the date range that you wish to see covered on the report (“Fiscal Year”, “Weekly”, or “Other”).
3. **Case Decision Start Date** – Enter the start date of the case decision.
4. **Case Decision End Date** – Enter the end date of the case decision.
5. Get Report – Click on this pushbutton to access the ***Closed Report*** screen depicted below.

Closed Report PDF

SBA Office of Hearings and Appeals
Closed Report

Report Date:10/19/2009
Case Filed Within: 10/19/2007 and 10/19/2009

Docket #	Appellant	Judge	Attorney	File Date	Decision	Decision Date	Decision #
0001-20080303-0001	Arnold Appellant	Blacken, Emma		03/03/2008	DEN	05/06/2008	0001-004624
1002-20040405-0001	test	Blazsik, Gloria	Bradbury Ann	04/05/2004	GRT	08/01/2008	1002-000785
1111-20071201-0001	kjlkj	Judge, Ohacts	Admin Ohacts	12/01/2007	DEN	10/01/2008	1111-000152
AHHS-20000101-9909	Asad	Mitnick, Mona	Admin Ohacts	01/01/2000	DIS	02/04/2008	AHHS-000115
AHHS-20080101-0001	Asad Chaklader	Mitnick, Mona	Hannon Glenn	01/01/2008	DIS	02/04/2008	AHHS-000115
AHHS-20080501-0002	Asad Chaklader V	Mitnick, Mona	Appover John	05/01/2008	DIS	02/04/2008	AHHS-000115
AHHS-20080507-0003	Test Appellant	Mitnick, Mona	Admin Ohacts	05/07/2008	DIS	02/04/2008	AHHS-000115
APPR-19900101-0001	asad	Whitmore jr, John	Attorney Ohacts	01/01/1990	A/D	04/14/2009	APPR-000043
APPR-20030101-0003	ASAD	Whitmore jr, John		01/01/2003	A/D	04/14/2009	APPR-000043
APPR-20031106-0001	Asad	Whitmore jr, John		11/06/2003	A/D	04/14/2009	APPR-000043
APPR-20031106-0002	Asad	Whitmore jr, John	Admin Ohacts	11/06/2003	A/D	04/14/2009	APPR-000043
APPR-20080101-1101	Asad Chaklader	Mitnick, Mona	Appover John	01/01/2008	DEN	05/08/2008	APPR-001057

Office of Hearings and Appeals [Closed Report]

Total Closed Cases :84
Page 1 of 6

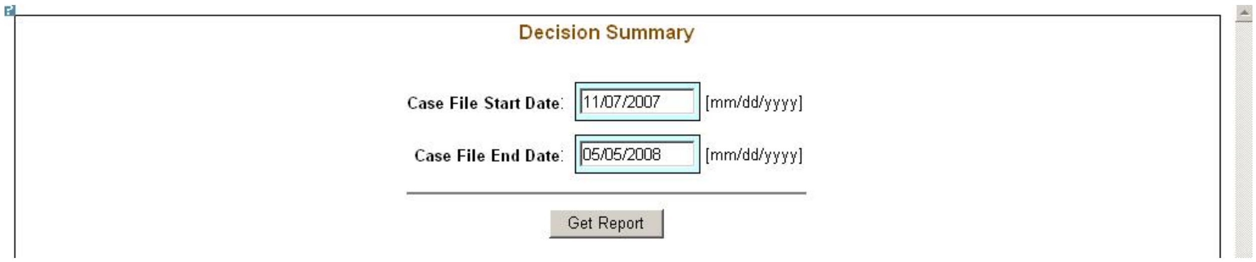
Description of Fields on Closed Report PDF

10. Docket # – This column displays the docket number. Click on "Docket Number" to sort the cases by alphabetical order.
11. Appellant – This column displays the name of the appellant associated with the case. Click on "Appellant" to sort the names by alphabetical order.
12. Judge – This column displays the name of the judge associated with the case. Click on "Judge" to sort the names by alphabetical order.
13. Attorney – This column displays the name of the attorney associated with the case. Click on "Attorney" to sort the names by alphabetical order.
14. File Date – This column displays the dates on which the cases were filed. Click on "File Date" to sort the cases by chronological order, with the oldest dates appearing first.
15. Decision – This column displays the decision codes. Click on "Decision" to sort the codes by alphabetical order.
16. Decision Date – This column displays the decision date. Click on "Decision Date" to sort the dates by chronological order, with the oldest dates appearing first.
17. Decision # – This column displays the decision number. Click on "Decision Number" to sort the decisions by alphabetical order.

6.4 Decision Summary

Access this screen by clicking on the Decision Summary link in the left-hand navigation tree.

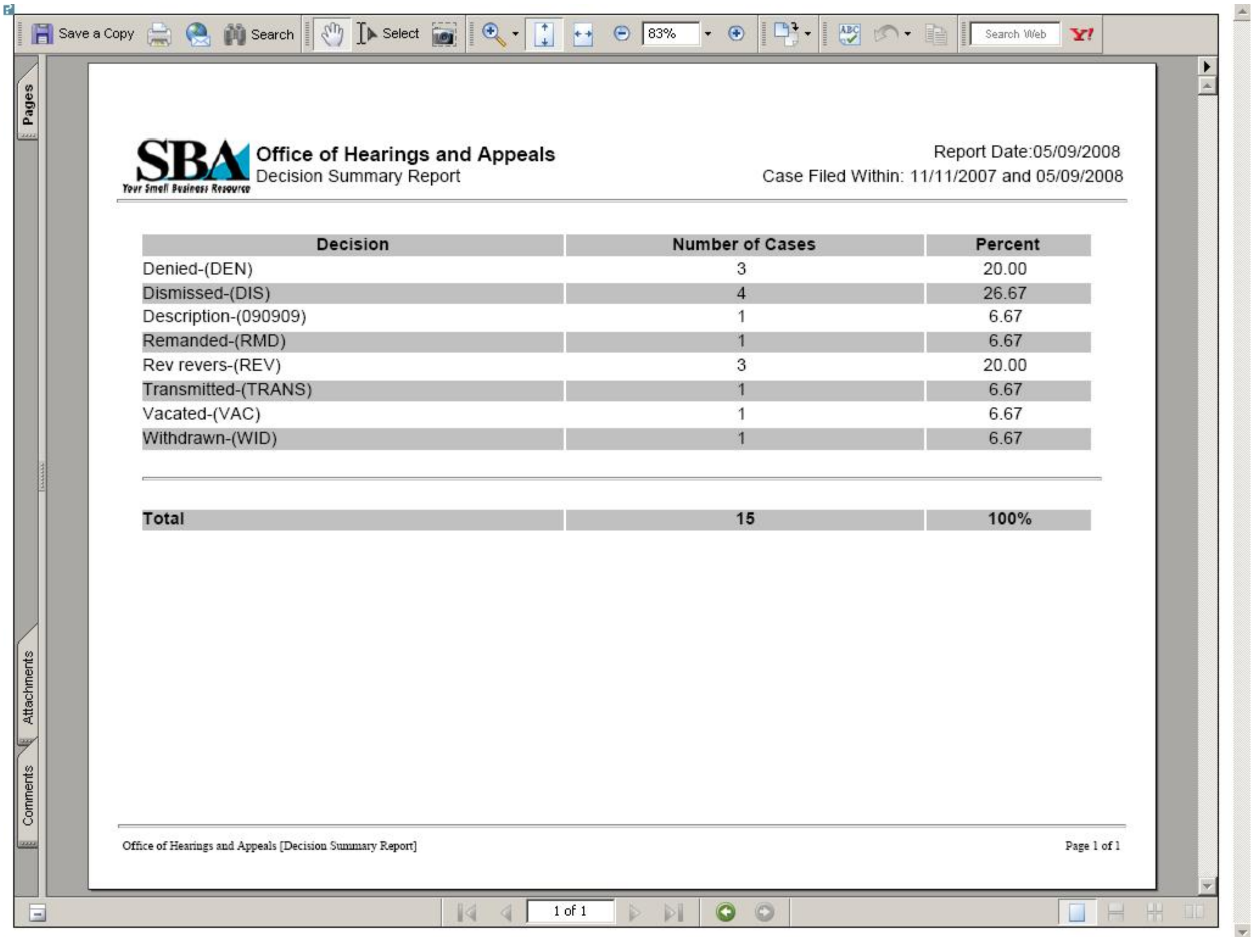
Use this screen to specify the Case File start/end dates that will appear on the report.



Definition of Terms on Decision Summary Screen

1. **Case File Start Date –** Enter the start date of the case file.
2. **Case File End Date –** Enter the end date of the case file.
3. Get Report – Click on this pushbutton to access the ***Decision Summary*** screen depicted below.

Decision Summary PDF



Office of Hearings and Appeals
Decision Summary Report

Report Date:05/09/2008
Case Filed Within: 11/11/2007 and 05/09/2008

Decision	Number of Cases	Percent
Denied-(DEN)	3	20.00
Dismissed-(DIS)	4	26.67
Description-(090909)	1	6.67
Remanded-(RMD)	1	6.67
Rev revers-(REV)	3	20.00
Transmitted-(TRANS)	1	6.67
Vacated-(VAC)	1	6.67
Withdrawn-(WID)	1	6.67
Total	**15**	**100%**

Office of Hearings and Appeals [Decision Summary Report]   Page 1 of 1

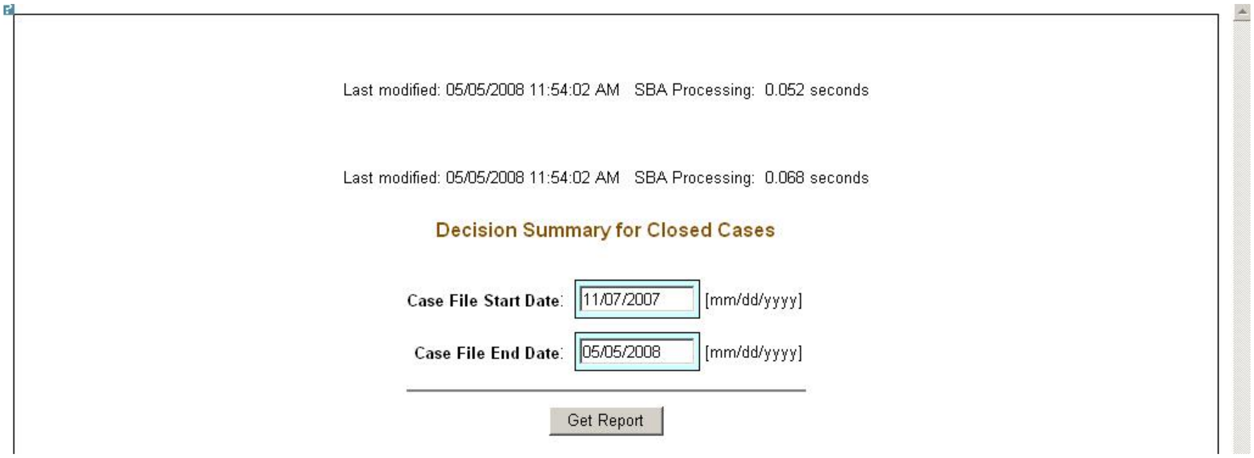
Description of Fields on Decision Summary PDF

1. Decision – This column displays the decision that was made.
2. Number of Cases – This column displays the number of cases having this decision.
3. Percent – This column expresses the percentage of total cases having this decision.

6.5 Decision Summary for Closed Cases

Access this screen by clicking on the Decision Summary for Close link in the left-hand navigation tree.

Use this screen to specify the Case File start/end dates that will appear on the report.

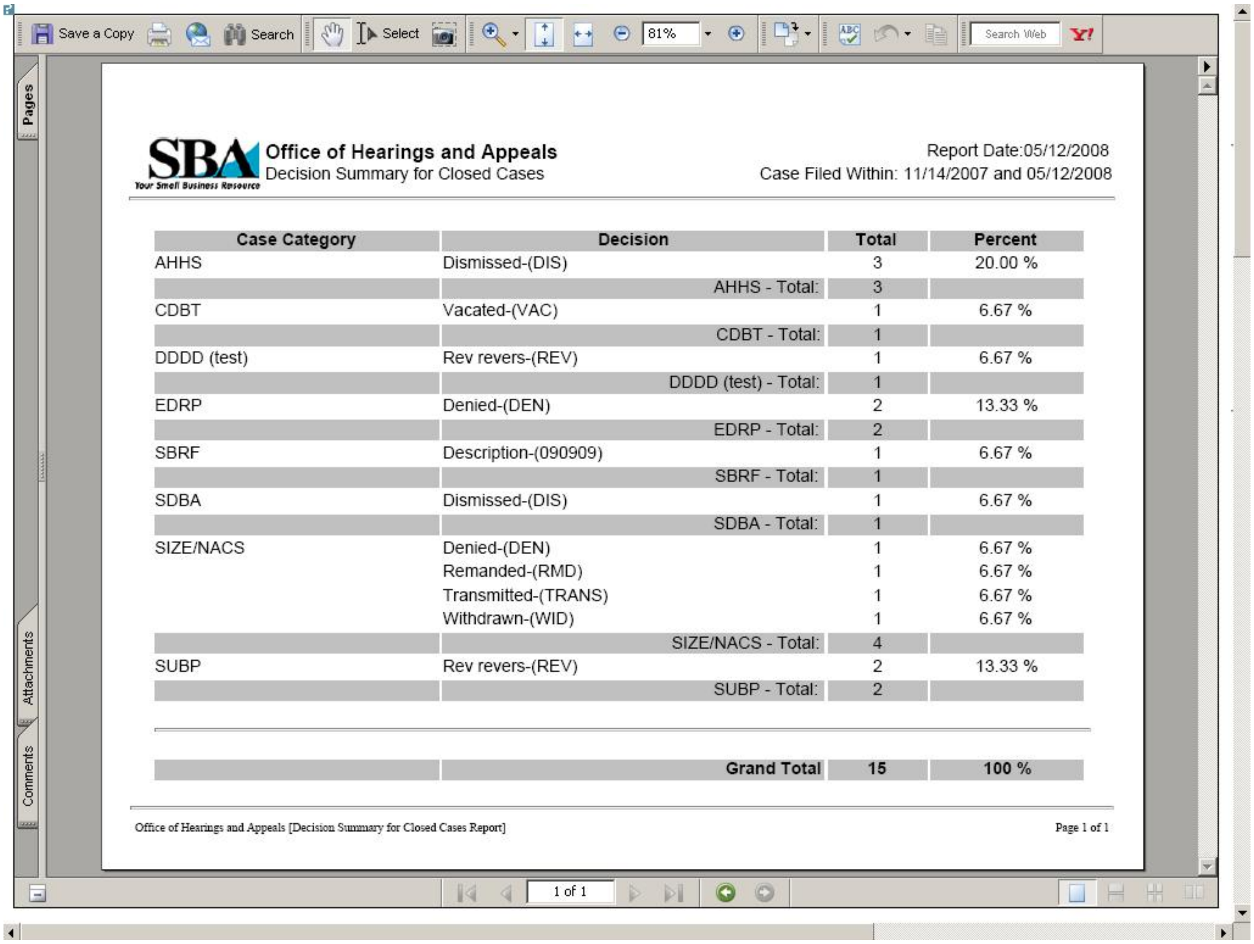


Definition of Terms on Decision Summary for Closed Cases Screen

1. **Case File Start Date –** Enter the start date of the case file.
2. **Case File End Date –** Enter the end date of the case file.

Get Report – Click on this pushbutton to access the ***Decision Summary for Closed Cases*** screen depicted below.

Decision Summary for Closed Cases PDF



SBA Your Small Business Resource

Office of Hearings and Appeals
Decision Summary for Closed Cases

Report Date:05/12/2008
Case Filed Within: 11/14/2007 and 05/12/2008

Case Category	Decision	Total	Percent
AHHS	Dismissed-(DIS)	3	20.00 %
	AHHS - Total:	3	
CDBT	Vacated-(VAC)	1	6.67 %
	CDBT - Total:	1	
DDDD (test)	Rev revers-(REV)	1	6.67 %
	DDDD (test) - Total:	1	
EDRP	Denied-(DEN)	2	13.33 %
	EDRP - Total:	2	
SBRF	Description-(090909)	1	6.67 %
	SBRF - Total:	1	
SDBA	Dismissed-(DIS)	1	6.67 %
	SDBA - Total:	1	
SIZE/NACS	Denied-(DEN)	1	6.67 %
	Remanded-(RMD)	1	6.67 %
	Transmitted-(TRANS)	1	6.67 %
	Withdrawn-(WID)	1	6.67 %
	SIZE/NACS - Total:	4	
SUBP	Rev revers-(REV)	2	13.33 %
	SUBP - Total:	2	
	Grand Total	**15**	**100 %**

Office of Hearings and Appeals [Decision Summary for Closed Cases Report]

Page 1 of 1

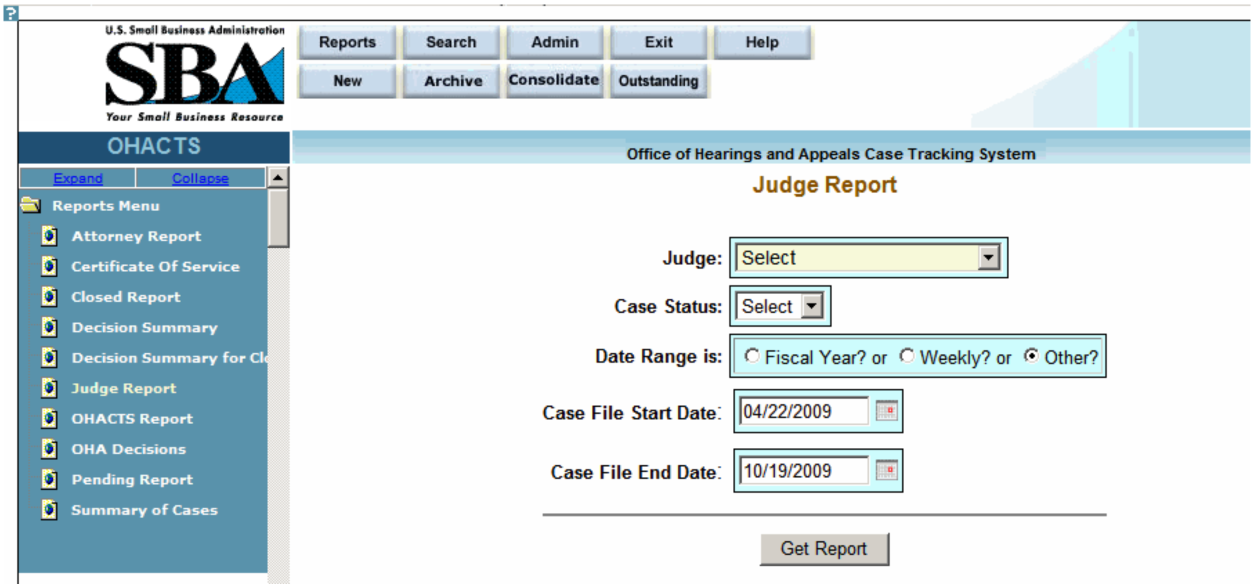
Definition of Terms on Decision Summary for Closed Cases Screen

1. Case Category – This column displays the category of the case.
2. Decision – This column displays the decision that was made.
3. Total – This column displays the number of cases having this decision.
4. Percent – This column expresses the percentage of total cases having this decision.

6.6 Judge Report

Access this screen by clicking on the **Judge Report** link in the left-hand navigation tree.

Use this screen to specify the following parameters that you wish to see on the report: judge, case status, and case file start/end dates.



Definition of Terms on Judge Report Screen

1. **Judge** – Use the drop-down list to select the judge whose status you wish to see on the report.
2. **Case Status** – Use the drop-down list to specify whether the case is "Open" or "Closed".
3. **Date Range is** – Click on a radio button to specify the date range. **Note:** If you click on "Other", then you must populate the "Case File Start Date" and "Case File End Date" fields by either entering the dates or using the calendar icons.
4. **Case File Start Date** – This field populates with 10/01/current fiscal year if the "Fiscal Year" radio button was clicked in "Date Range" above. This field populates with the previous Friday date ***before*** the "Case File End Date" field if the "Weekly" radio button was clicked in "Date Range" above.
5. **Case File End Date** – This field populates with 09/30/current fiscal year if the "Fiscal Year" radio button was clicked in "Date Range" above. This field populates with the previous Friday date if the "Weekly" radio button was clicked in "Date Range" above. (If the current date is a Friday, that date will populate the "Case File End Date" field.)

Get Report – Click on this pushbutton to access the ***Judge Report*** screen depicted below.

Judge Report PDF

Office of Hearings and Appeals
Judge Report

Report Date:10/19/2009
Case Filed Within: 04/22/2005 and 10/19/2009
Judge: Judge, Ohacts
Case Status:Open

Docket #	Appellant	Attorney	Filed Date	Case Type
NACS-20080520-0001	QA Tester Appellant	Attorney Ohacts	05/20/2008	NACS
SIZE-20090429-0003	Third Appellant	Approver Test	04/29/2009	SIZE
WWWW-20081031-1234	Test Appellant	Admin Ohacts	10/31/2008	WWWW
ZZZZ-20080512-0001	Test Appellant Name	Attorney Ohacts	05/12/2008	ZZZZ
ZZZZ-20080512-1122	Duplicate Docket	Chudamani Sury	05/12/2008	ZZZZ

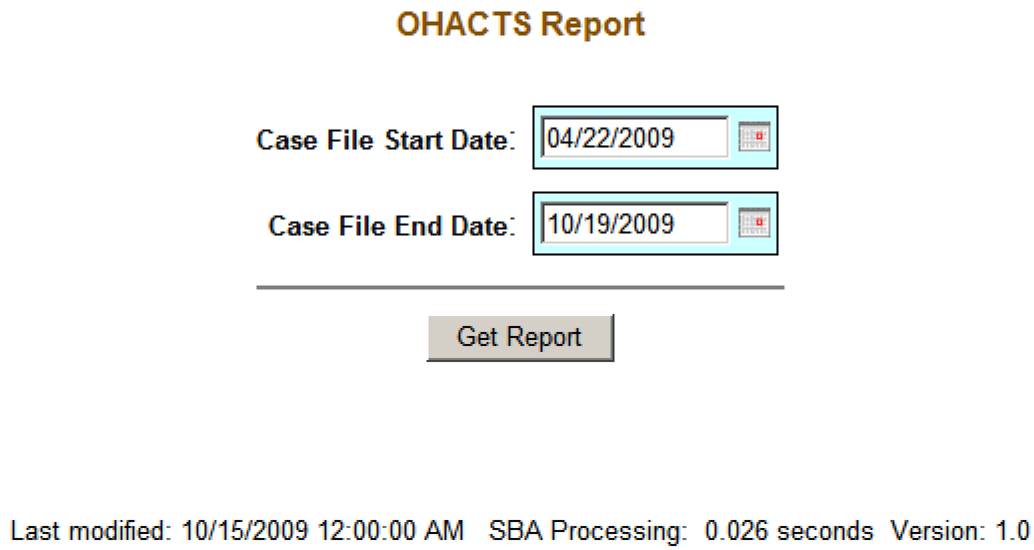
Definition of Terms on Judge Report Screen

1. Docket # – This column displays the docket number. Click on “Docket Number” to sort the cases by alphabetical order.
2. Appellant – This column displays the name of the appellant associated with the case. Click on “Appellant” to sort the names by alphabetical order.
3. Attorney – This column displays the name of the attorney associated with the case. Click on “Attorney” to sort the names by alphabetical order.
4. Filed Date – This column displays the dates on which the cases were filed. Click on “File Date” to sort the cases by chronological order, with the oldest dates appearing first.
5. Case Type – This column displays the case type. Click on “Case Type” to sort the cases by alphabetical order.

6.7 OHACTS Report

This screen is accessed by selecting the OHACTS Report link in the left-hand navigation tree.

Use this screen to specify the Case File start/end dates that will appear on the report.



Definition of Terms on OHACTS Report Screen

1. **Case File Start Date –** Enter the start date of the case file.
2. **Case File End Date –** Enter the end date of the case file.
3. Get Report – Click on this pushbutton to access the ***OHACTS Report*** screen depicted below.

OHACTS Report PDF

Office of Hearings and Appeals
OHACTS Report

Report Date:10/19/2009
Case Filed Within: 04/22/2009 and 10/19/2009

Docket #	Judge	Attorney	Case Type	NAICS Sol#	Petitioner	Filed Date	Decision Number	Decision Date
APPR-20090428-0008	Aeddy, Praveen	Admin Ohacts	APPR		Test	04/28/2009	APPR-008554	
APPR-20090429-1243	Aeddy, Praveen	Admin Ohacts	APPR		Test By ASad	04/29/2009		
SIZE-20090429-0001	Judge, Ohacts	Attorney Ohacts	SIZE		Test Appellant Name	04/29/2009	SIZE-001234	04/29/2009
SIZE-20090429-0002	Judge, New	Attorney Ohacts	SIZE		Appellant Name 2	04/29/2009	SIZE-012345	
SIZE-20090429-0003	Judge, Ohacts	Approver Test	SIZE		Third Appellant	04/29/2009		

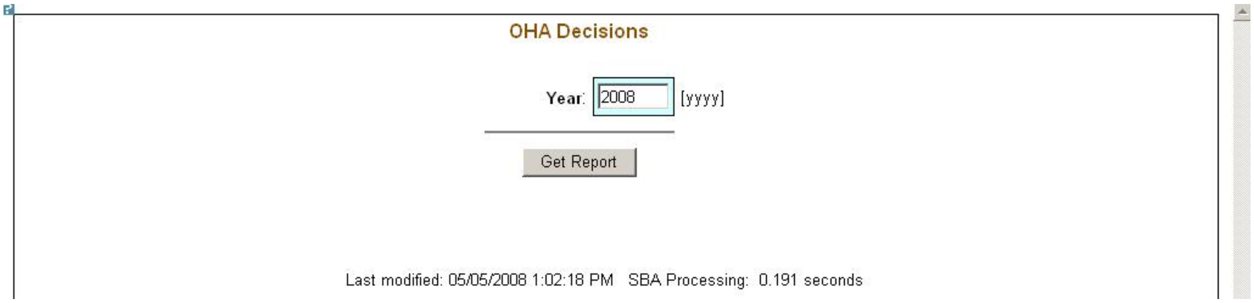
Definition of Terms on OHACTS Report Screen

1. Docket # – This column displays the docket number. Click on “Docket Number” to sort the cases by alphabetical order.
2. Judge – This column displays the name of the judge. Click on “Judge” to sort the judges’ names by alphabetical order.
3. Attorney – This column displays the name of the attorney. Click on “Attorney” to sort the attorneys’ names by alphabetical order.
4. Case Type – This column displays the case type code. Click on “Case Type” to sort the case types in alpha-numerical order.
5. NAICS Sol # – This column displays the NAICS solicitation code. This code is set up in the ***Solicitation List*** screen.
6. Petitioner – This column displays the name of the petitioner. Click on “Petitioner” to sort the petitioners’ names by alphabetical order.
7. Filed Date – This column displays the dates on which the cases were filed. Click on “File Date” to sort the cases by chronological order, with the oldest dates appearing first.
8. Decision Number – This column displays the decision number. Click on “Decision Number” to sort the decision numbers by numerical order.
9. Decision Date – This column displays the decision date. Click on “Decision Date” to sort the decision dates by chronological order, with the oldest dates appearing first.

6.8 OHA Decisions

This screen is accessed by selecting the **OHA Decisions** link in the left-hand navigation tree.

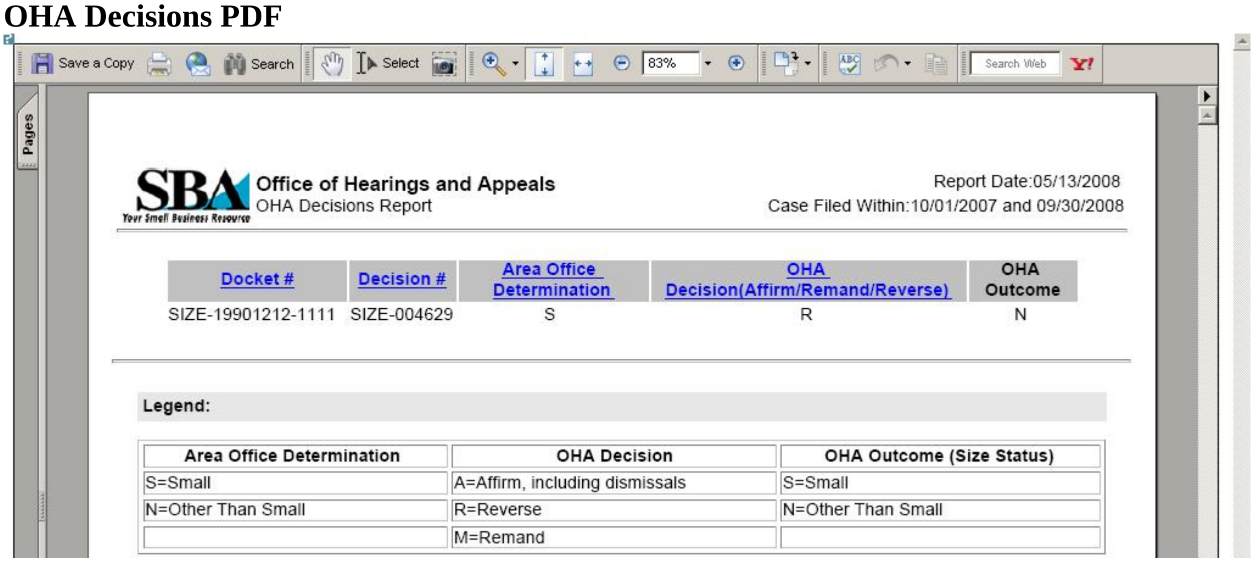
Use this screen to specify the year for which you wish to view OHA decisions on your report.



Definition of Terms on OHA Decisions Screen

1. **Year –** Enter the year for which you wish to see OHA Decisions.
2. Get Report – Click on this pushbutton to access the ***OHA Decisions Report*** screen depicted below.

OHA Decisions PDF



Definition of Terms on OHA Decisions Report Screen

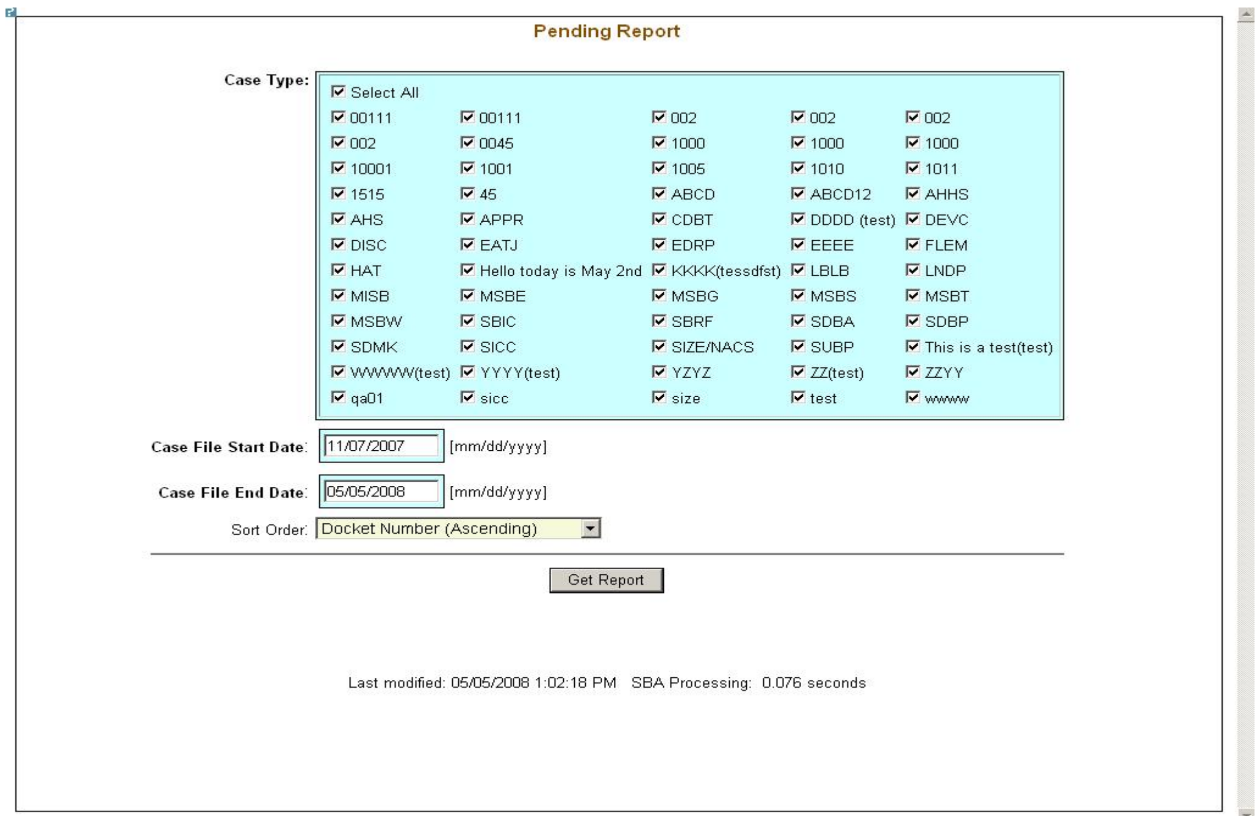
1. Docket # – This column displays the docket number. Click on “Docket Number” to sort the cases by alphabetical order.
2. Decision # – This column displays the decision number. Click on “Decision Number” to sort the decision numbers by numerical order.

3. Area Office Determination – This column displays the area office determination. Click on “Decision Number” to sort the decision numbers by numerical order.
4. OHA Decision – This column displays the OHA decision. Note: this column will have a value only if the “Docket #” column contains either a “NAICS” or “SIZE” code.
5. OHA Outcome – This column displays the OHA outcome decision. Note: this column will have a value only if the “Docket #” column contains either a “NAICS” or “SIZE” code.

6.9 Pending Report

This screen is accessed by selecting the **Pending Report** link in the left-hand navigation tree.

Use this screen to specify the following parameters: “Case Type”, “Case File Start Date”, and “Case File End Date”.



Definition of Terms on Pending Report Screen

1. **Case Type** – Select the checkbox(es) of the particular case type(s) that you wish to see on the report. Select the “Select All” checkbox if you wish to include them all.
2. **Case File Start Date** – Enter the start date of the case file.

3. **Case File End Date** – Enter the end date of the case file.
4. Sort Order – Use this drop-down list to specify the sort order (e.g. “Docket Number” ascending/descending or “Case File Date” ascending/descending).

Get Report – Click on this pushbutton to access the ***Pending Report*** screen depicted below.

Pending Report PDF

SBA Your Small Business Resource **Office of Hearings and Appeals**
Pending Report

Report Date:10/19/2009
Case Filed Within: 04/22/2007 and 10/19/2009

Docket #	Appellant	Judge	Attorney	Filed Date	Days Elapsed
APPR-20090428-0008	Test	Aeddy, Praveen	Admin Ohacts	04/28/2009	174
APPR-20090429-1243	Test By ASad	Aeddy, Praveen	Admin Ohacts	04/29/2009	173
NACS-20071201-0002	Clerk - Appelant	Judge, Ohacts		12/01/2007	688
NACS-20080520-0001	QA Tester Appellant	Judge, Ohacts	Attorney Ohacts	05/20/2008	517
NACS-20080602-1234	jhjhj	Crump, Foi	Gannon Sandra	06/02/2008	504
NACS-20080929-0001	test2	Blazsik, Gloria	Approver Test	09/29/2008	385
SDBA-20080101-1111	Asad	Blazsik, Gloria	Admin Ohacts	01/01/2008	657
SIZE-20070908-7668	hjnkjhkjjh	Cole, Michael	Jackson Clarence	09/08/2007	772
SIZE-20071201-0001	QA Test Appellant 1	Judge, Ohacts		12/01/2007	688
SIZE-20071201-0003	test appellant	Judge, Ohacts		12/01/2007	688
SIZE-20071227-0004	Appellant Name	Judge, Ohacts		12/27/2007	662

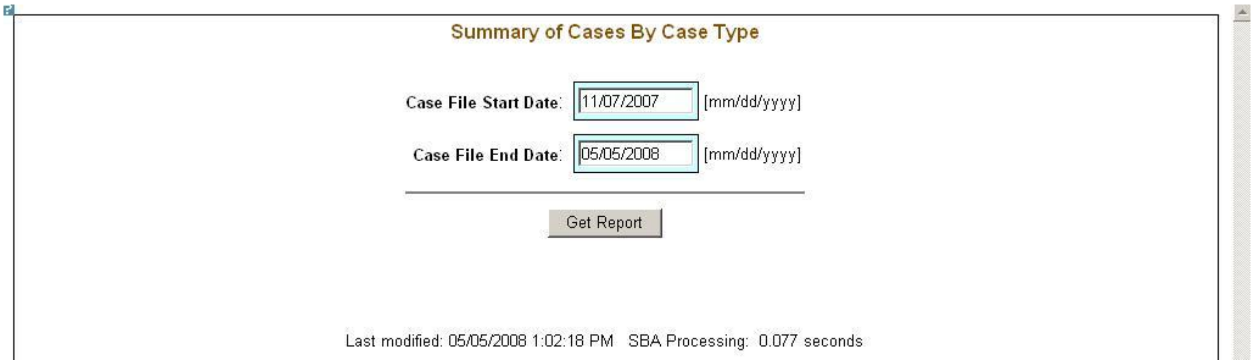
Definition of Terms on Pending Report Screen

1. Docket # – This column displays the docket number. Click on “Docket Number” to sort the cases by alphabetical order.
2. Appellant – This column displays the appellant’s name. Click on “Appellant” to sort the appellant names by alphabetical order.
3. Judge – This column displays the judge’s name. Click on “Judge” to sort the judge names by alphabetical order.
4. Attorney – This column displays the attorney’s name. Click on “Attorney” to sort the attorney names by alphabetical order.
5. Filed Date – This column displays the filed date (date on which the case was filed.)
6. Days Elapsed – This column displays the days elapsed. This is the number of days that have passed between the “Filed Date” and the date of the report. Click on “Days Elapsed” to sort the days elapsed by chronological order (oldest dates will appear at the top).

6.10 Summary of Cases

This screen is accessed by selecting the **Summary of Cases** link in the left-hand navigation tree.

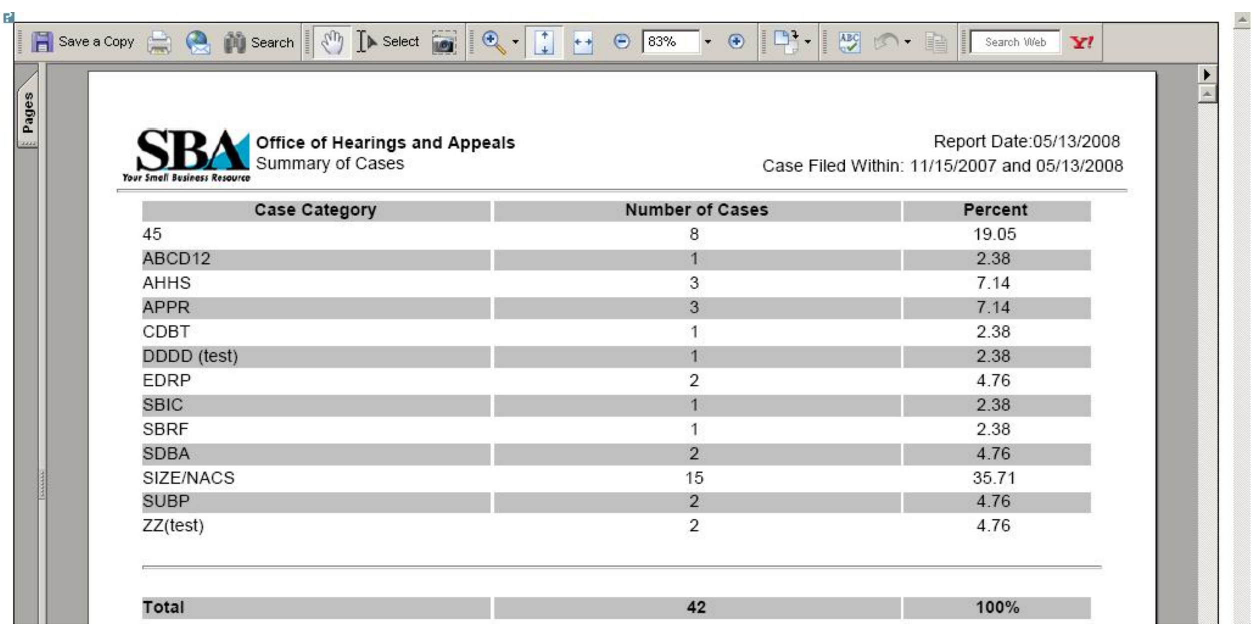
Use this screen to specify the Case File start/end dates that will appear on the report.



Definition of Cases By Case Type Screen

1. **Case File Start Date** – Enter the start date of the case file.
2. **Case File End Date** – Enter the end date of the case file.
3. Get Report – Click on this pushbutton to access the ***Summary of Cases*** report screen depicted below.

Summary of Cases PDF



SBA Your Small Business Resource
Office of Hearings and Appeals
Summary of Cases

Report Date:05/13/2008
Case Filed Within: 11/15/2007 and 05/13/2008

Case Category	Number of Cases	Percent
45	8	19.05
ABCD12	1	2.38
AHHS	3	7.14
APPR	3	7.14
CDBT	1	2.38
DDDD (test)	1	2.38
EDRP	2	4.76
SBIC	1	2.38
SBRF	1	2.38
SDBA	2	4.76
SIZE/NACS	15	35.71
SUBP	2	4.76
ZZ(test)	2	4.76
Total	**42**	**100%**

Definition of Terms on Summary of Cases Screen

1. Case Category – This column displays the case category.

2. Number of Cases – This column displays the number of cases in this particular case category.
3. Percent – This column displays the percentage represented the number of cases in this category related to the total number of cases in all categories.

7 Search

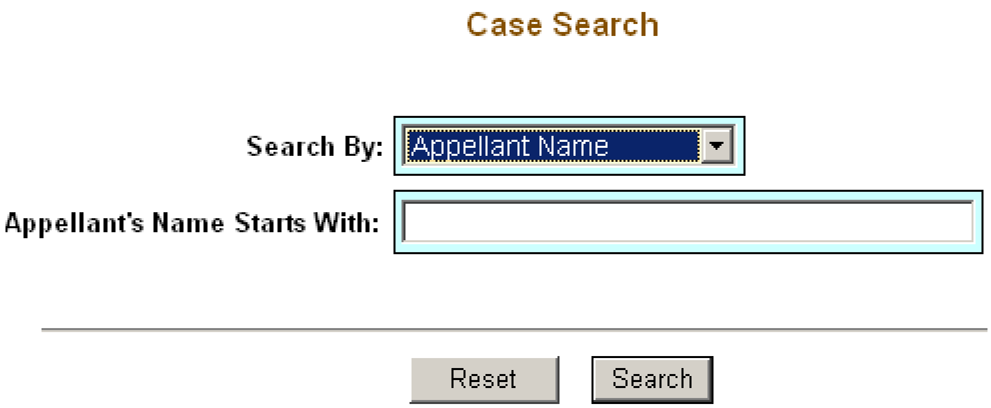
– Use this pushbutton to access the ***Case Search*** screen where you will have the choice of various parameters to specify in your search for a case.

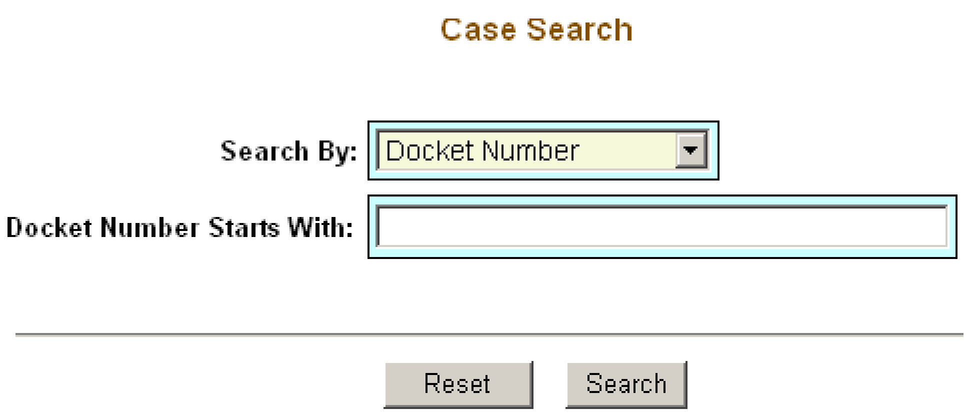
7.1 Case Search

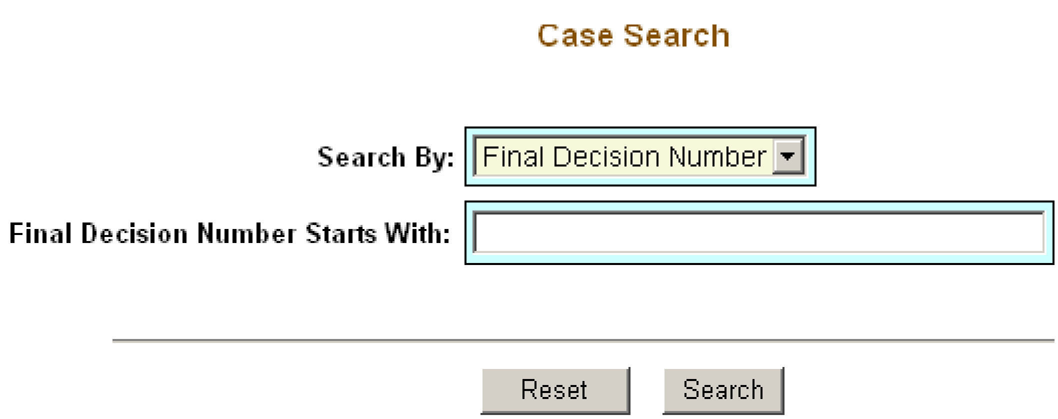
Definition of Terms on Case Search Screen

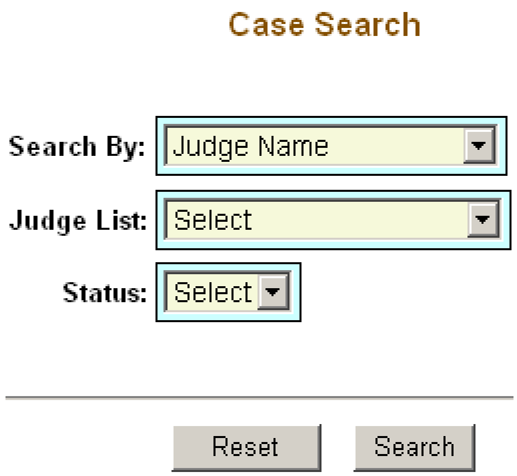
Search By – Use this drop-down list to specify the search parameter that you wish to use to search for a case, (e.g. “Appellant Name”, “Docket Number”, “Final Decision Number”, etc.) Based on the parameter that you specify, one or more of the following fields will appear under the “Search By” drop-down list:

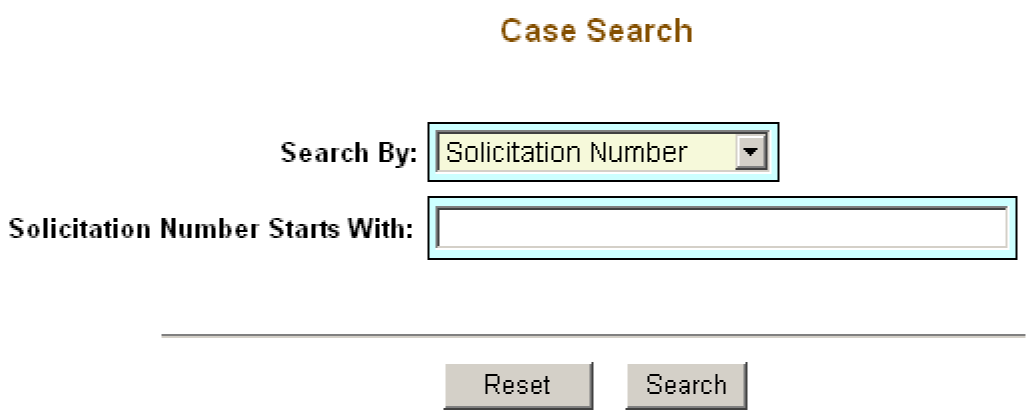
- Search Text
- Case Code
- Judge List


Case Search
Search By:
Appellant Name
Appellant's Name Starts With:
Reset
Search


Case Search
Search By:
Docket Number
Docket Number Starts With:
Reset
Search


Case Search
Search By:
Final Decision Number
Final Decision Number Starts With:
Reset
Search





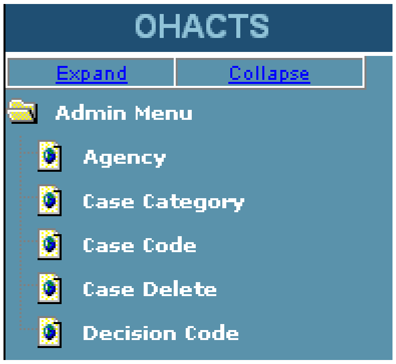
Reset – Click on this pushbutton to reset all the fields to their original values.

Search – Select this pushbutton to send your search request to the database.

The screenshot below depicts the result of a case search by solicitation number.

8 Admin

– Click on this pushbutton to access the Administrative menu. This menu is depicted in the screenshot below:

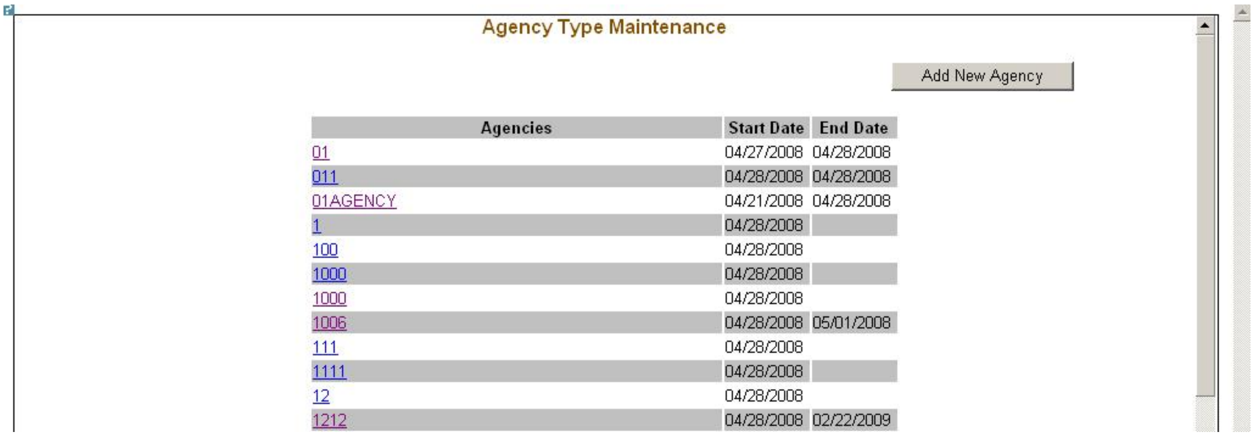


1. Agency – Agency Type Maintenance: Use this screen to add agencies and agency addresses.
2. Case Category – Case Category Maintenance: Use this screen to add or change case type categories.
3. Case Code – Case Type Maintenance: Use this screen to add or change case codes.
4. Decision Code – Decision Type Maintenance: Use this screen to add or change decision codes.

8.1 Agency Type Maintenance Screen

This screen is accessed by selecting the Agency link from the left-hand navigation tree.

Use this screen to access the ***Add Agency*** screen and the ***Edit Agency*** screen.



Agencies	Start Date	End Date
01	04/27/2008	04/28/2008
011	04/28/2008	04/28/2008
01AGENCY	04/21/2008	04/28/2008
1	04/28/2008	
100	04/28/2008	
1000	04/28/2008	
1000	04/28/2008	
1006	04/28/2008	05/01/2008
111	04/28/2008	
1111	04/28/2008	
12	04/28/2008	
1212	04/28/2008	02/22/2009

Definition of Terms on Agency Type Maintenance Screen

Add New Agency **–** Click on this pushbutton to access the ***Add Agency*** screen where you will be able to add an additional agency.

1. Agencies – Click on a link in this column to access the ***Edit Agency*** screen where you can edit the start/end dates as well as add an address.
2. Start Date – This read-only column displays start date.
3. End Date – This read-only column displays end date, if any.

8.1.1 Add Agency

This screen is accessed by selecting the 

pushbutton in the screen above (***Agency Type Maintenance*** screen**).**
Use this screen to add an additional agency type.

Definition of Terms on Add Agency Type Maintenance Screen

1. **Agency Name –** Enter the name of the agency.
2. **Start Date –** Enter the start date.
3. End Date – Enter the end date, if any.

– Click on this pushbutton to delete an entry. This will clear all the fields on the screen.

– Click on this pushbutton to reset all the fields to their original values.

– Click on this pushbutton to save the information on the screen to the database.

8.1.2 Edit Agency

This screen is accessed by selecting a link in the “Agencies” column of the ***Agency Type Maintenance*** screen.

Use this screen to edit: start/end dates and addresses as well as to add a new address. Edit a current address by clicking on a link in the “Addresses” table.

Definition of Terms on Edit Agency Screen

1. Agency Name – This read-only field displays the name of the agency.
2. **Start Date** – Edit the start date.
3. End Date – Edit the end date, if any.

– Click on this pushbutton to delete an entry. This will clear all the fields on the screen.

– Click on this pushbutton to reset all the fields to their original values.

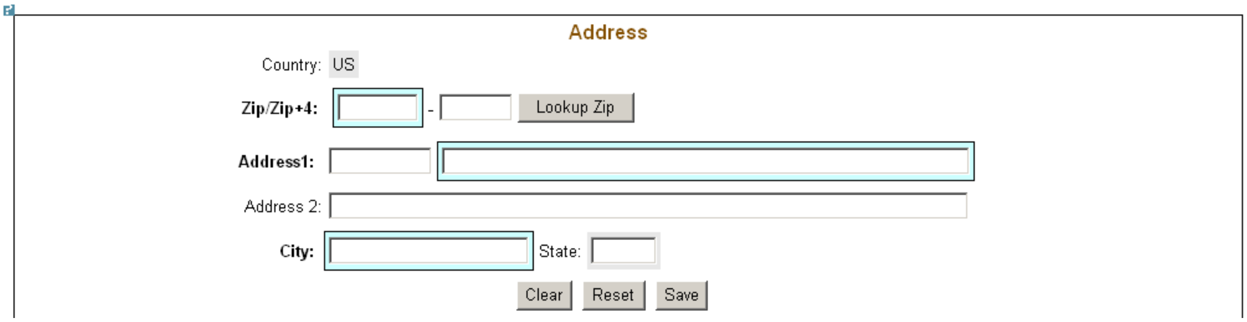
– Click on this pushbutton to save the information on the screen to the database.

– Click on this pushbutton to access the ***Address*** screen where you can add an additional address.

Address

This screen is accessed by clicking on the Add Address pushbutton in the screen above (***Edit Agency***).

Use this screen to add an additional address.



Definition of Terms on the Address Screen

1. Country – This read-only field will display “US” if the address is in the United States.
2. **Zip/Zip+4** – Enter the zip code in this field.
3. Lookup Zip – Select this pushbutton to automatically populate the “City” and “State” fields.
4. **Address 1** – Enter the first line of the address.
5. Address 2 – Enter the second line of the address.
6. **City** – Enter the city.
7. State – Enter the state.

Clear – Click on this pushbutton to delete an entry. This will clear all the fields on the screen.

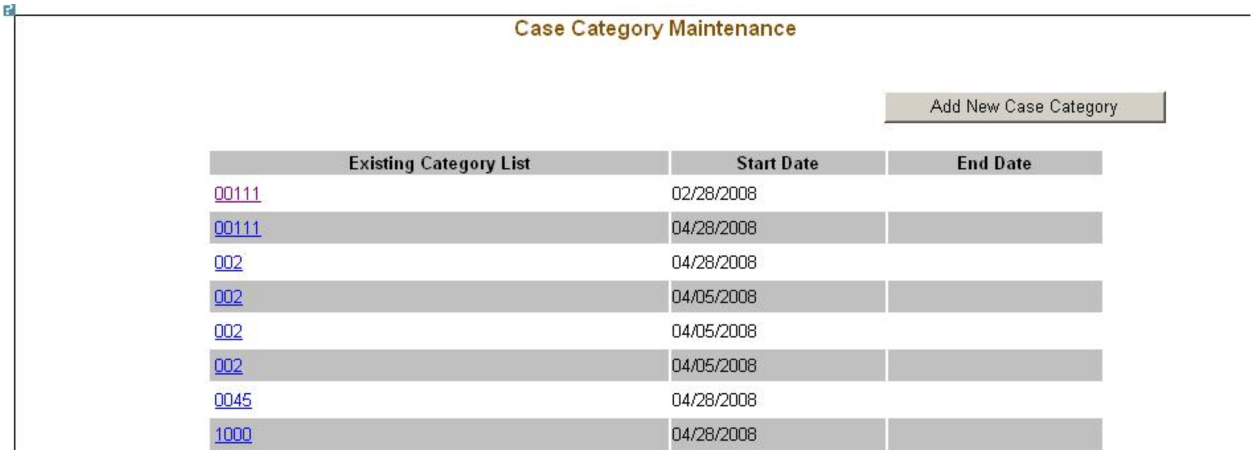
Reset – Click on this pushbutton to reset all the fields to their original values.

Save – Click on this pushbutton to save the information on the screen to the database.

8.2 Case Category Maintenance

This screen is accessed by clicking on the **Case Category** link on the left-hand navigation tree.

Use this screen to access the ***Add Case Category*** screen as well as the ***Edit Case Category*** screen.


Case Category Maintenance

Add New Case Category

Existing Category List	Start Date	End Date
00111	02/28/2008	
00111	04/28/2008	
002	04/28/2008	
002	04/05/2008	
002	04/05/2008	
002	04/05/2008	
0045	04/28/2008	
1000	04/28/2008	

Definition of Terms on Case Category Maintenance Screen

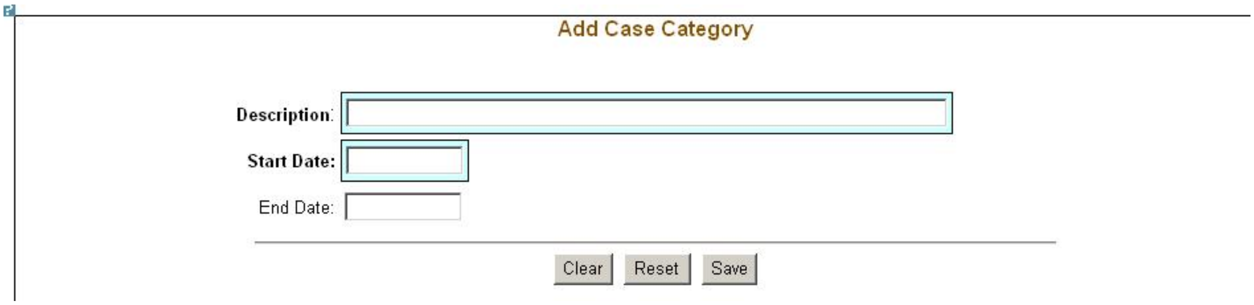
Add New Case Category **–** Select this pushbutton to access the ***Add Case Category*** screen.

1. Existing Category List – Click on a link in this column to access the ***Edit Case Category* screen.** On that screen, you can edit the start/end dates.
2. Start Date – This read-only column displays the start date.
3. End Date – This read-only column displays the end date, if any.

8.2.1 Add Case Category

This screen is accessed by clicking on the Add New Case Category in the screen above **(*Case Category Maintenance*)**.

Use this screen to add an additional case type category.



Definition of Terms on Add Case Category Screen

1. **Description** – Enter a new category description.
2. **Start Date** – Enter a start date.
3. End Date – Enter an end date, if any.

Clear – Click on this pushbutton to delete an entry. This will clear all the fields on the screen.

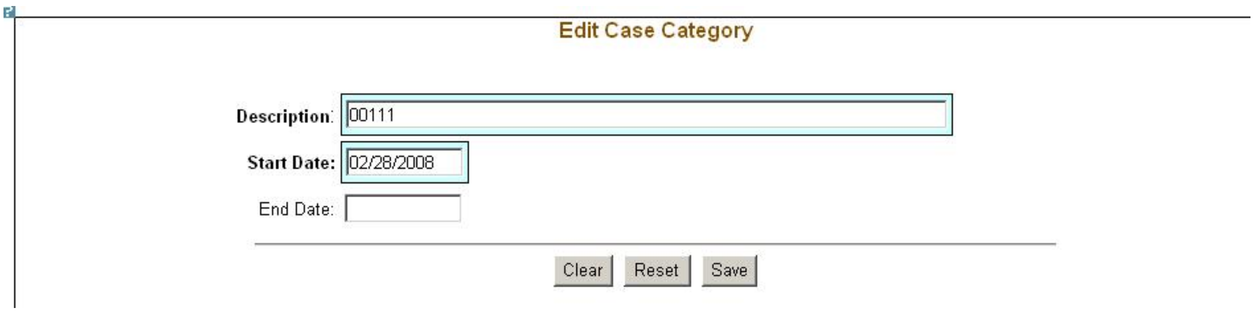
Reset – Click on this pushbutton to reset all the fields to their original values.

Save – Click on this pushbutton to save the information on the screen to the database.

8.2.2 Edit Case Category

This screen is accessed by clicking on a link in the “Existing Category List” column of the ***Case Type Category Maintenance* screen.**

Use this screen to edit an existing category type.



Definition of Terms on Edit Case Category Screen

1. **Description –** Edit the description of the case type category.
2. **Start Date –** Edit the start date.
3. End Date – Edit the end date, if any.

– Click on this pushbutton to delete an entry. This will clear all the fields on the screen.

– Click on this pushbutton to reset all the fields to their original values.

– Click on this pushbutton to save the information on the screen to the database.

8.3 Case Type Maintenance

This screen is accessed by clicking on the Case Code link in the left-hand navigation tree.

Use this screen to access the ***Add Case Type*** screen as well as editing an existing case type.

Case Type Maintenance

Add New Case Type

Case Type	Case Description	Start Date	End Date
0001	test Update	04/28/2008	03/04/2007
0002	test April 08 insert(sbic)	04/28/2008	02/02/2009
0003	New Test on 04/08(AHHS)	04/28/2008	04/28/2008
0004	reas	04/28/2008	04/28/2008
0005	MSM	04/28/2008	04/28/2008
0006	AAA	04/28/2008	04/28/2008
0007	Variables.	04/28/2008	04/28/2008
0008	aaa	04/28/2008	04/28/2008
0009	testshjsjahdjhdsjahdjksa	04/28/2008	04/28/2008
0010	a	04/28/2008	04/28/2008
0011	TEST INSERT	04/28/2008	04/28/2008

Definition of Terms on Case Type Maintenance Screen

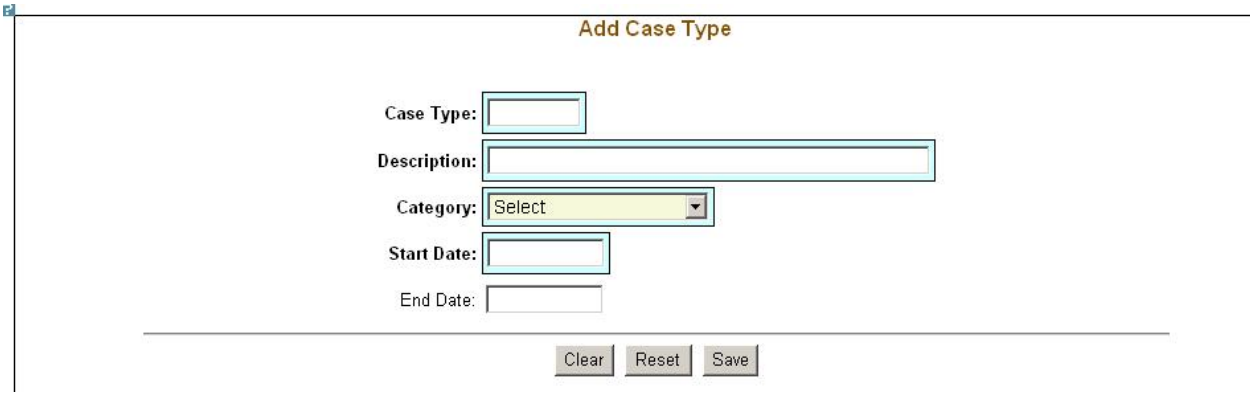
Add New Case Type **–** Click on this pushbutton to access the ***Add Case Type* Screen.**

1. Case Type – Click on a link in this column to access the ***Edit Case Type*** screen where you can edit the case description as well as the start/end dates.
2. Case Description – This read-only column displays a description of the case.
3. Start Date – This read-only column displays the start date.
4. End Date – This read-only column displays the end date, if any.

8.3.1 Add Case Type

This screen is accessed by selecting the Add New Case Type pushbutton in the screen above (***Case Type Maintenance***).

Use this screen to add a new case type.



Description of Terms on Add Case Type Screen

1. **Case Type –** Enter the case type.
2. **Description –** Enter a description of the case type.
3. **Category –** Use the drop-down list to select a category.
4. **Start Date –** Enter the start date.
5. End Date – Enter the end date, if any.

Clear – Click on this pushbutton to delete an entry. This will clear all the fields on the screen.

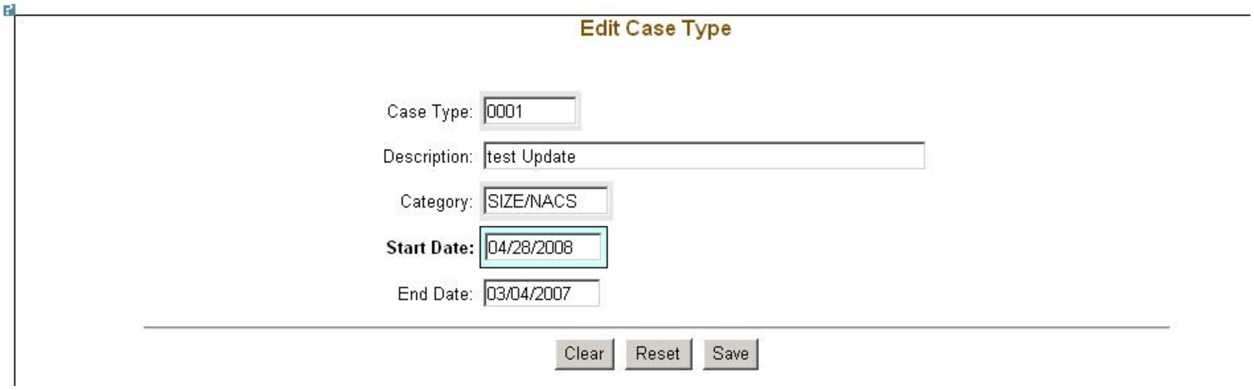
Reset – Click on this pushbutton to reset all the fields to their original values.

Save **–** Click on this pushbutton to save the information on the screen to the database.

8.3.2 Edit Case Type

Access this screen by selecting a link in the “Case Type” column of the ***Case Type Maintenance*** screen.

Use this screen to edit: the case description and the start/end dates.



Description of Terms on the Edit Case Type Screen

1. Case Type – This read-only field displays the case type.
2. Description – Edit the description of the case type.
3. Category – This read-only field displays the category type.
4. Start Date – Edit the start date.
5. End Date – Edit the end date, if any.

– Click on this pushbutton to delete an entry. This will clear all the fields on the screen.

– Click on this pushbutton to reset all the fields to their original values.

– Click on this pushbutton to save the information on the screen to the database.

8.4 Decision Type Maintenance

Access this screen by clicking on the Decision Code link in the left-hand navigation tree.

Use this screen to access the ***Add Decision Type*** screen as well as the ***Edit Decision Type*** screen.

Decision Type Maintenance

Add New Decision Type

Decision Code	Decision Description	Start Date	End Date
0001	Asalaaaa	04/28/2008	04/28/2008
0002	insert 04/08-update	04/28/2008	05/01/2008
0003	sssssssss	04/28/2008	04/28/2008
0003	test	04/28/2008	04/28/2008
0003	ssssssss	04/28/2008	04/28/2008
0006	snmnsn	04/28/2008	04/28/2008
01010	testll	04/28/2008	04/28/2008
1000	test	04/28/2008	04/28/2008
1000	test Update	04/28/2008	04/28/2008
1001	south	04/28/2008	04/28/2008
1002	east	04/28/2008	04/28/2008
1005	case decision	04/28/2008	04/28/2008

Definition of Terms on Decision Type Maintenance Screen

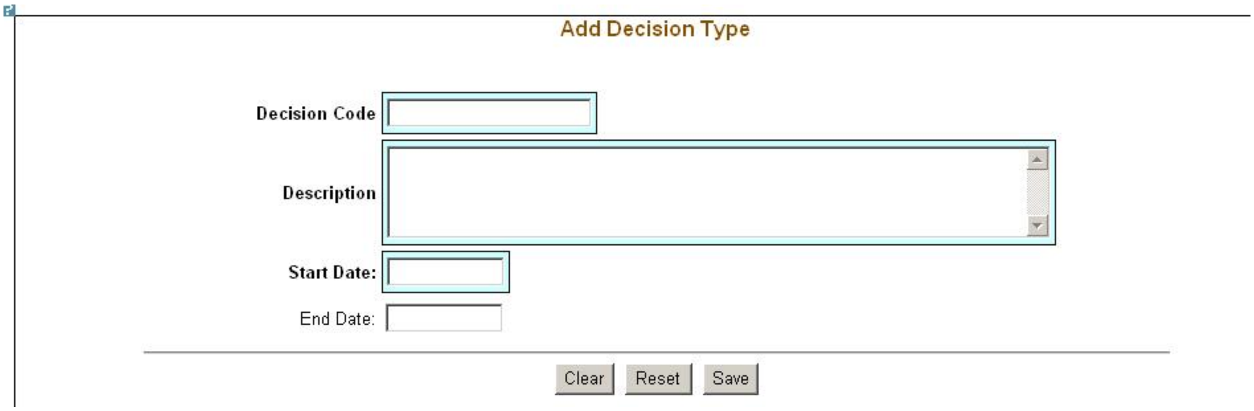
Add New Decision Type – Select this pushbutton to access the ***Add Decision Type*** Screen.

1. Decision Code – Click on a link in this column to access the ***Edit Decision Type*** screen where you can edit the description and start/end dates.
2. Decision Description – This read-only column displays the decision description.
3. Start Date – This read-only column displays the start date.
4. End Date – This read-only column displays the end date, if any.

8.4.1 Add Decision Type

This screen is accessed by selecting the Add New Decision Type pushbutton in the screen above (***Decision Type Maintenance***).

Use this screen to add a new decision type.



Description of Terms on Add Decision Type Screen

1. **Decision Code** – Enter the decision code.
2. **Description** – Enter the description.
3. **Start Date** – Enter the start date.
4. End Date – Enter the end date, if any.

Clear – Click on this pushbutton to delete an entry. This will clear all the fields on the screen.

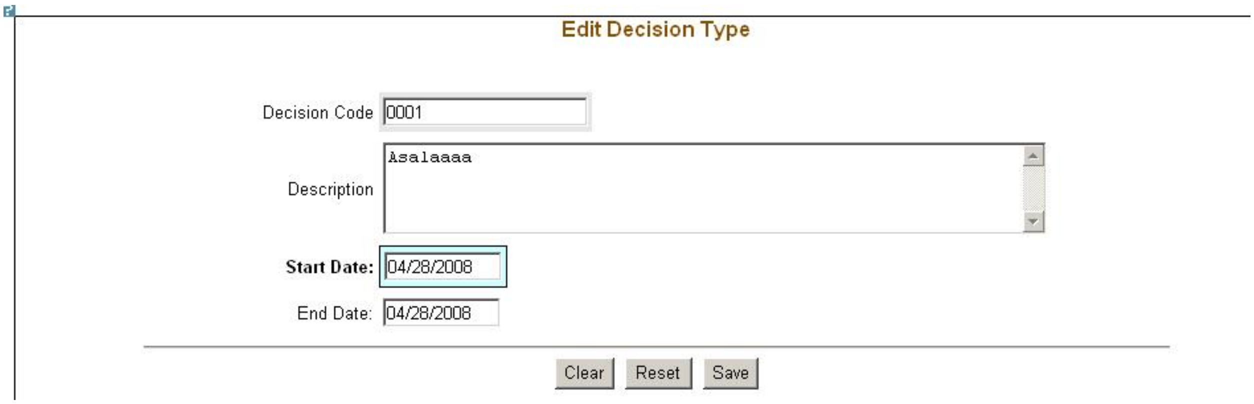
Reset – Click on this pushbutton to reset all the fields to their original values.

Save **–** Click on this pushbutton to save the information on the screen to the database.

8.4.2 Edit Decision Type

This screen is accessed by clicking on a link in the “Decision Code” column of the ***Decision Type Maintenance*** screen.

Use this screen to edit decision types.



Definition of Terms on Edit Decision Type Screen

1. Decision Code – This read-only field displays the decision code.
2. Description – Edit the description
3. **Start Date –** Edit the start date.
4. End Date – Edit the end date, if any.

– Click on this pushbutton to delete an entry. This will clear all the fields on the screen.

– Click on this pushbutton to reset all the fields to their original values.

– Click on this pushbutton to save the information on the screen to the database.

9 Exit

– Select this pushbutton to exit the OHACTS application and return to the ***General Login System – Choose Function* Screen**.

10 Help

– Select this pushbutton to open a new window where you will be able to view online help.

11 Archive

This module is accessed by selecting the **Archive** pushbutton from the top menu.

Use this screen to search for existing archives as well as to add new ones.

Archive Selection

Definition of Terms on Archive Selection Screen

Archive Year – Enter the archive year in this field.

Search – Select this pushbutton to access the ***Update Archive*** screen where you can view existing archive detail as well as take action on archives.

Add New Archive – Select this pushbutton to access the ***Add Archive*** screen where you can create additional archives.

11.1 Update Archive

This screen is accessed by selecting the Search pushbutton in the screen above (***Archive Selection***).

Use this screen to view existing archive information as well as to create new archive information.

Archive Date	Accession #	Destroy Date
01/02/2008	1315	01/02/2008
01/23/2008	9898	01/24/2008
04/01/2008	6565	04/04/2005
04/01/2008		
04/05/2008	5421	04/22/2008
04/10/2008	1234	04/11/2008
04/11/2008	1234	04/11/2008
04/11/2008	5214	04/22/2008
04/11/2008	9876	04/21/2008
04/22/2008	1234	04/22/2008
04/22/2008	3256	04/23/2008
04/23/2008	12345	04/28/2008
04/24/2008		
04/24/2008		
04/24/2008	1245	04/25/2008
04/24/2008	5632	04/28/2008
04/24/2008	5623	04/28/2008
04/24/2008	2543	04/24/2008
04/25/2008	44441111	04/28/2008
04/25/2008	5632	04/28/2008

Definition of Terms on Update Archive Screen

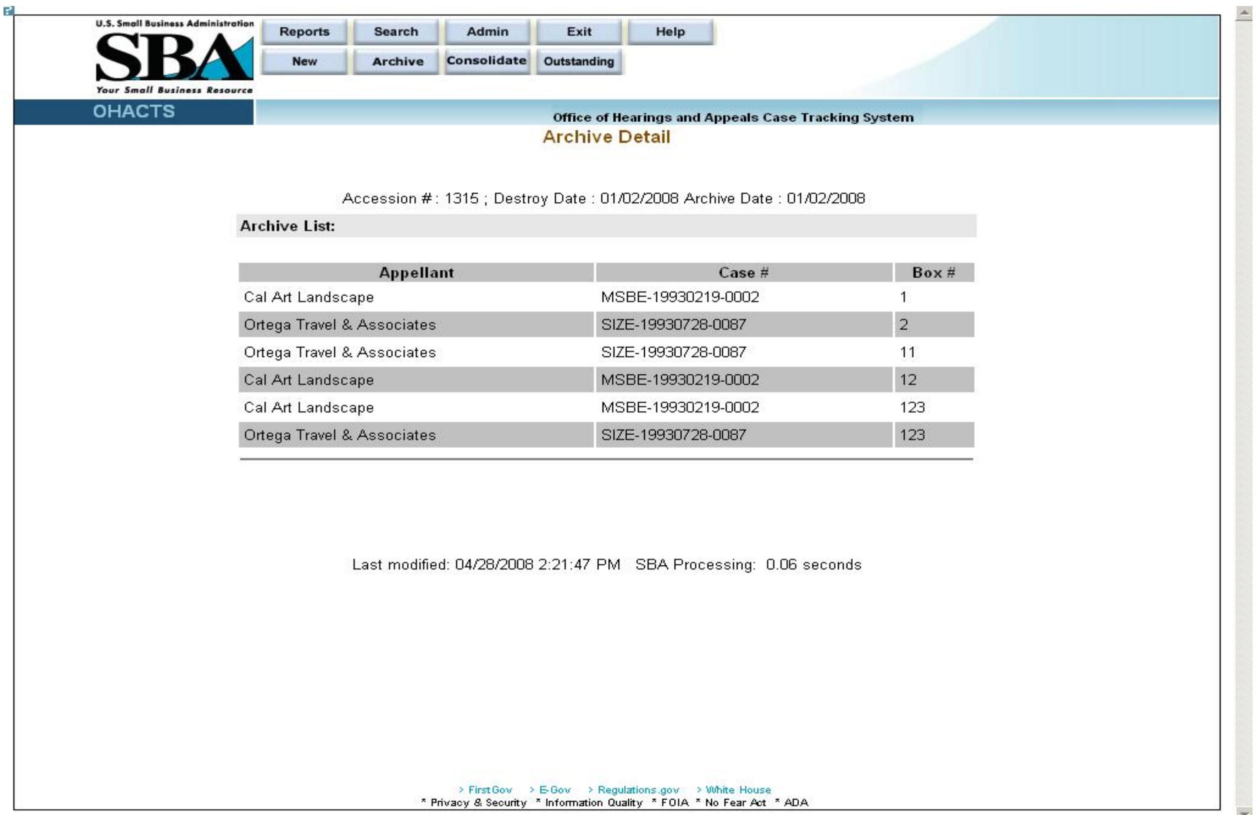
1. Archive Date – This column displays the archive date. Click on a link in this column to access the ***Archive Detail*** screen. Note: if the “Accession #” and “Destroy Date” columns contain any values, the ***Archive Detail*** screen will be view-only. However, if the “Accession #” and “Destroy Date” columns are empty, you will be able to edit information in the ***Archive Detail*** screen
2. Accession # – This read-only column displays the accession number.
3. Destroy Date – This read-only column displays the destroy date.

11.1.1 Archive Detail

This screen is accessed by clicking on a link in the "Archive Date" column in the screen above (***Update Archive***).

Use this screen to either view archive data of archives that have already been processed or to edit archives that have not yet been processed.

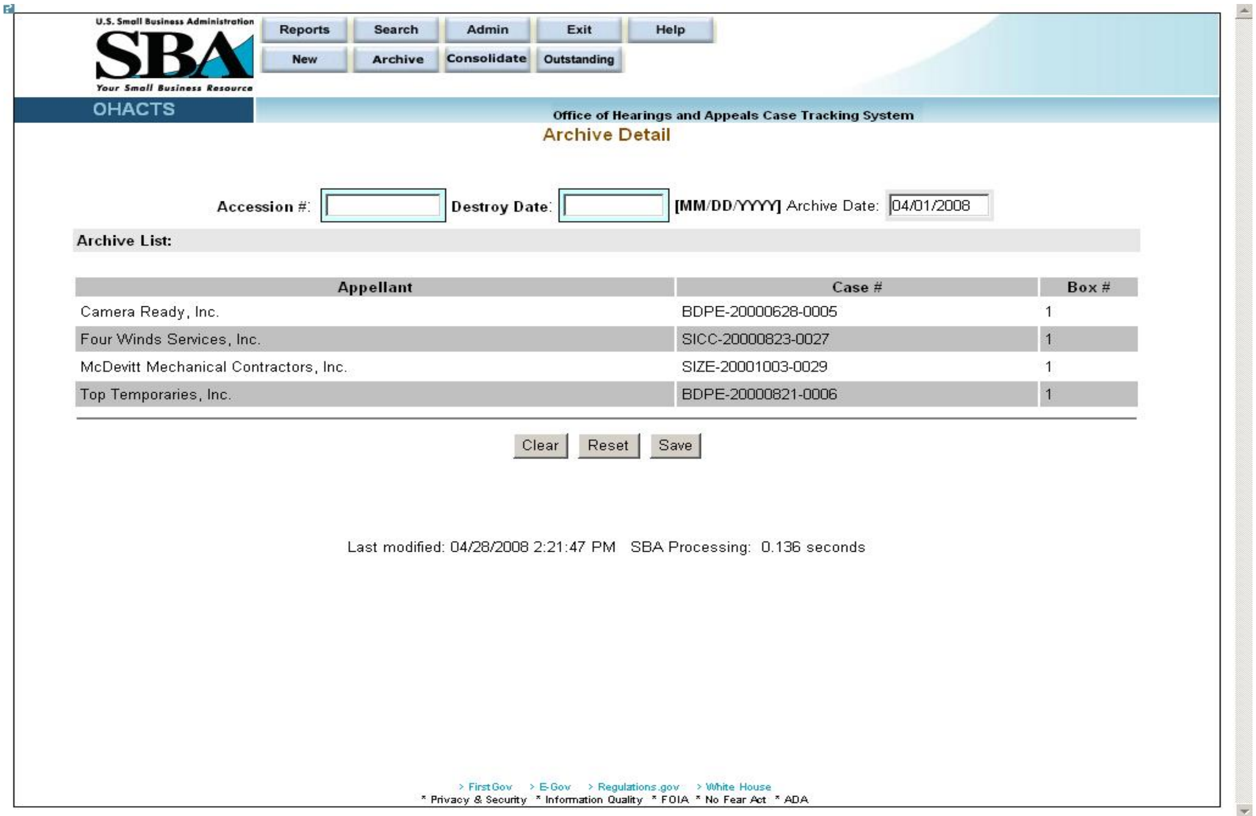
Screenshot depicting an archive that has already been processed.



Definition of Terms on Archive Detail Screen

1. Appellant – This read-only column displays the name of the appellant.
2. Case # – This read-only column displays the accession number.
3. Box # – This read-only column displays the box number in which the archive is stored.

Screenshot depicting an archive that has not yet been processed.



Definition of Terms on Archive Detail Screen

1. **Accession #** – Enter the accession number.
2. **Destroy Date –** Enter the date on which the file was destroyed.
3. Archive Date – Enter the archive date.
4. Appellant – This read-only column displays the name of the appellant.
5. Case # – This read-only column displays the accession number.
6. Box # – This read-only column displays the box number in which the archive is stored.

Clear – Click on this pushbutton to delete an entry. This will clear all the fields on the screen.

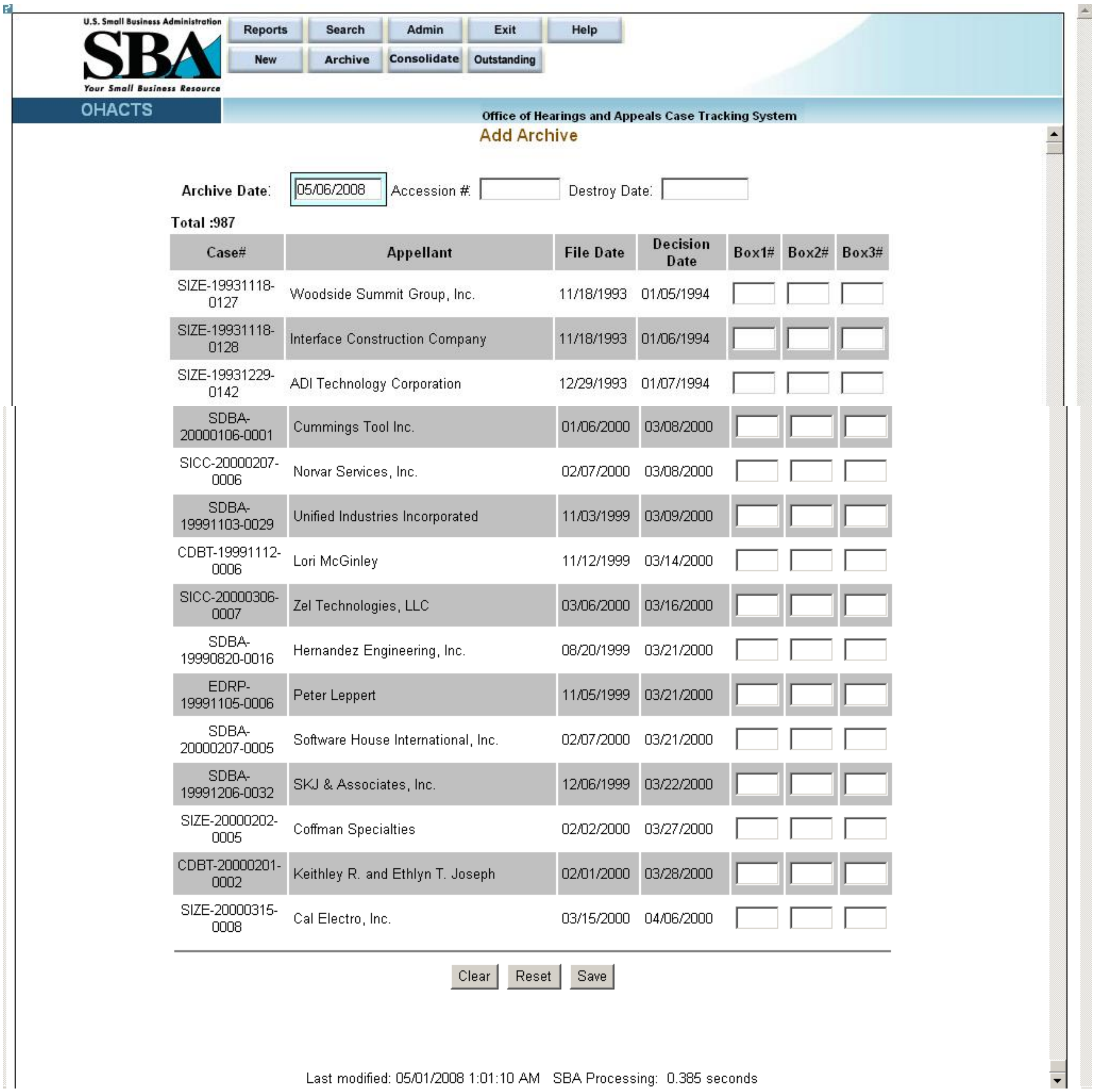
Reset – Click on this pushbutton to reset all the fields to their original values.

Save – Click on this pushbutton to save the information on the screen to the database.

11.2 Add Archive

This screen is accessed by clicking on the Add New Archive pushbutton in the ***Archive Selection*** screen.

Use this screen to create an additional archive.


U.S. Small Business Administration
SBA
Your Small Business Resource
Reports | Search | Admin | Exit | Help
New | Archive | Consolidate | Outstanding
OHACTS
Office of Hearings and Appeals Case Tracking System
Add Archive

Archive Date: 05/06/2008 Accession #: Destroy Date:

Total :987

Case#	Appellant	File Date	Decision Date	Box1#	Box2#	Box3#
SIZE-19931118-0127	Woodside Summit Group, Inc.	11/18/1993	01/05/1994			
SIZE-19931118-0128	Interface Construction Company	11/18/1993	01/06/1994			
SIZE-19931229-0142	ADI Technology Corporation	12/29/1993	01/07/1994			
SDBA-20000106-0001	Cummings Tool Inc.	01/06/2000	03/08/2000			
SICC-20000207-0006	Norvar Services, Inc.	02/07/2000	03/08/2000			
SDBA-19991103-0029	Unified Industries Incorporated	11/03/1999	03/09/2000			
CDBT-19991112-0006	Lori McGinley	11/12/1999	03/14/2000			
SICC-20000306-0007	Zel Technologies, LLC	03/06/2000	03/16/2000			
SDBA-19990820-0016	Hernandez Engineering, Inc.	08/20/1999	03/21/2000			
EDRP-19991105-0006	Peter Leppert	11/05/1999	03/21/2000			
SDBA-20000207-0005	Software House International, Inc.	02/07/2000	03/21/2000			
SDBA-19991206-0032	SKJ & Associates, Inc.	12/06/1999	03/22/2000			
SIZE-20000202-0005	Coffman Specialties	02/02/2000	03/27/2000			
CDBT-20000201-0002	Keithley R. and Ethlyn T. Joseph	02/01/2000	03/28/2000			
SIZE-20000315-0008	Cal Electro, Inc.	03/15/2000	04/06/2000			

Clear | Reset | Save

Last modified: 05/01/2008 1:01:10 AM SBA Processing: 0.385 seconds

Definition of Terms on Add Archive Screen

1. **Archive Date** – Enter the archive date.
2. Accession # – Enter the accession number.
3. Destroy Date – Enter the date on which the archive was destroyed.

4. Case # – This read-only field displays the case number.
5. Appellant – This read-only field displays the name of the appellant.
6. File Date – This read-only field displays the date on which the archive was filed.
7. Decision Date – This read-only field displays the decision date.
8. Box 1#, Box 2#, Box 3# – Enter the actual box number(s) where the files are archived.

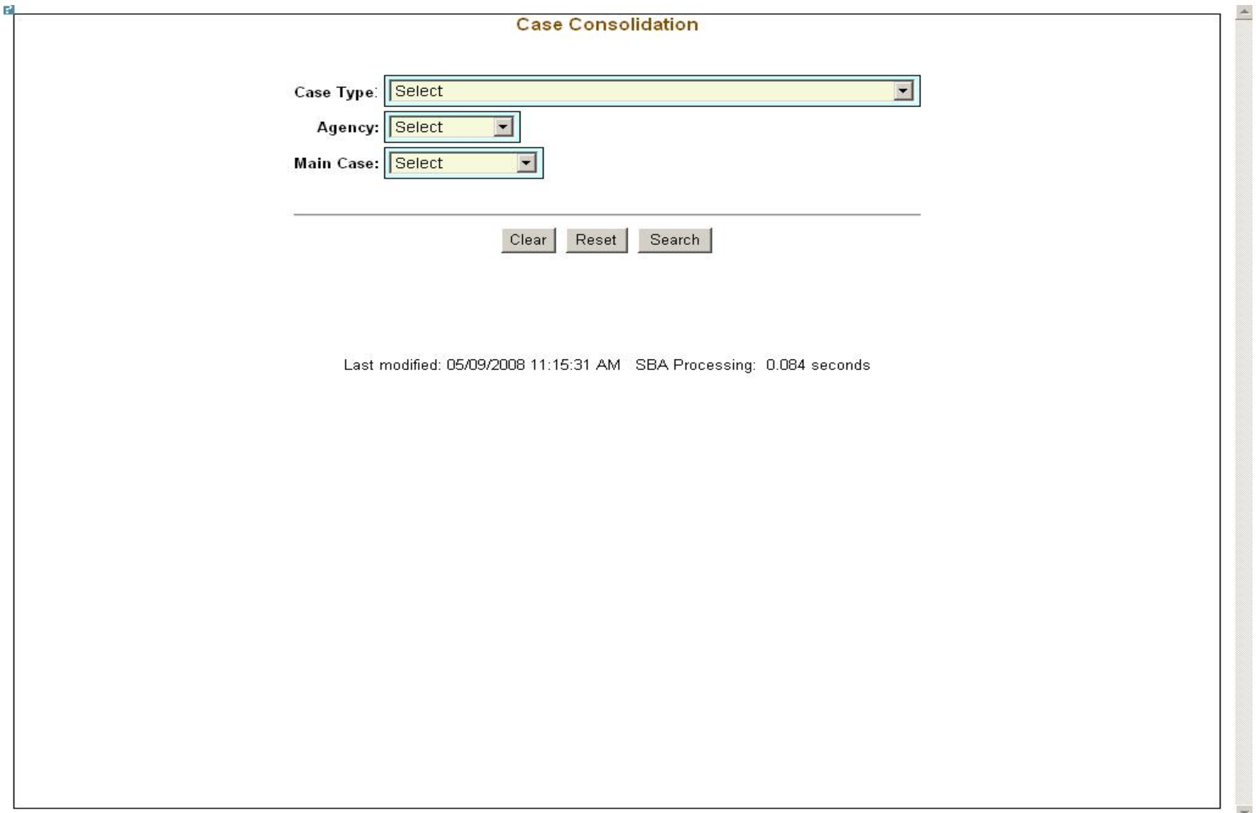
12 Case Consolidation (Search)

This module is accessed by selecting the 

pushbutton from the top menu.

Use this screen to search for existing cases that you would like to consolidate.

Note: you can only consolidate ***open*** cases having the ***same case code*** and the ***same agency***.



Description of Terms on Case Consolidation Screen

1. **Case Type –** Use the drop-down list to select the case type (e.g. “Privilege to Appear”, “Business Development Program Eligibility”, “Business Development Program Suspension”, etc.)
2. **Agency** – Use the drop-down list to select the agency.
3. **Main Case –** Use the drop-down list to specify the main case.

– Click on this pushbutton to delete an entry. This will clear all the fields on the screen.

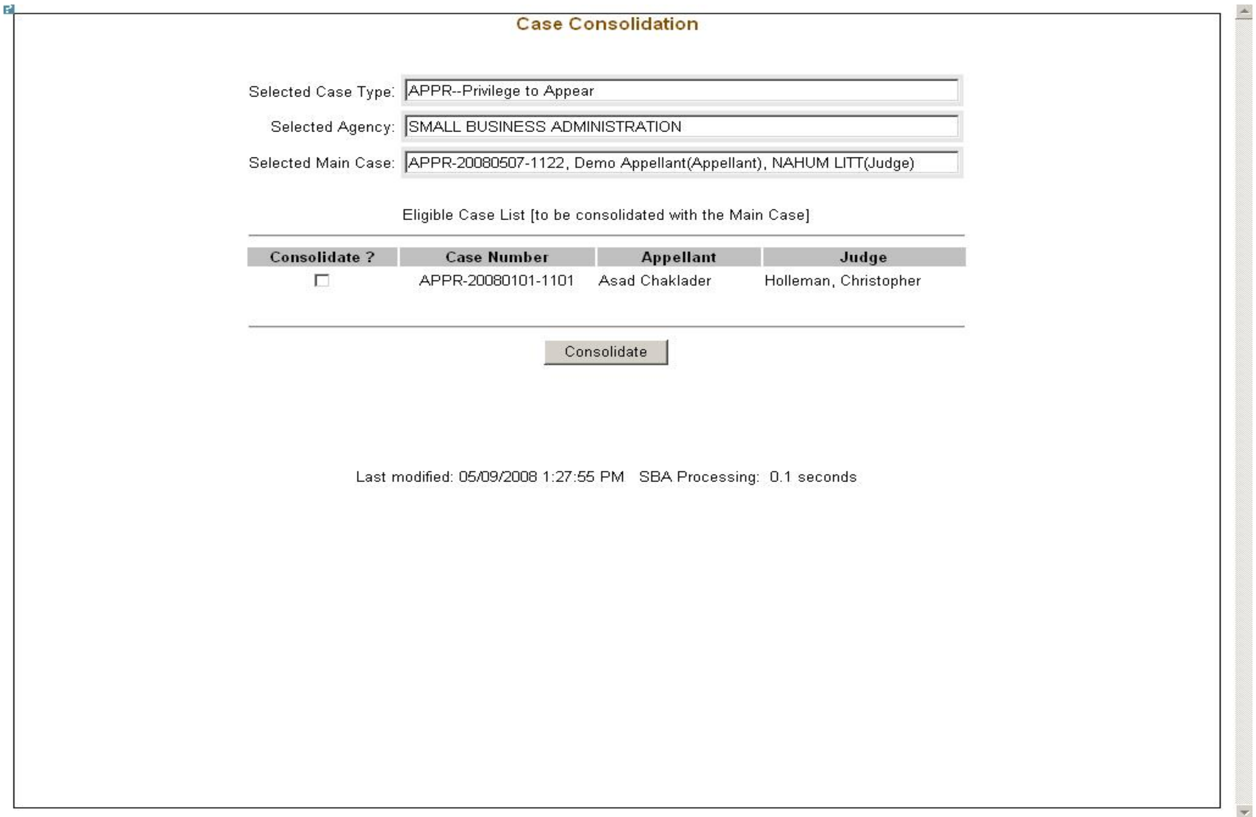
– Click on this pushbutton to reset all the fields to their original values.

– Click on this pushbutton to find the case that matches the criteria that you specified. The system will only return those cases having the ***same case code*** and the ***same agency***.

12.1 Case Consolidation (Result)

This screen is accessed by clicking on the Search pushbutton in the screen above (***Case Consolidation – Search)***.

Note: all fields on this screen are view-only with the exception of the “Consolidate” checkbox.



Definition of Terms on Case Consolidation (Result) Screen

1. Selected Case Type – This read-only field displays the case type that you specified in the screen above (***Case Consolidation – Search***).
2. Selected Agency – This read-only field displays the agency that you specified in the screen above (***Case Consolidation – Search***).
3. Selected Main Case – This read-only field displays the main case that you specified in the screen above (***Case Consolidation – Search***). The name of the (main) judge in this field will replace the name of the judge in the case(s) listed in the “Eligible Case List” table below.

Eligible Case List – This table presents you with a list of cases that you can consolidate with the main case by selecting the corresponding checkbox in the “Consolidate?” column and then selecting the Consolidate pushbutton at the bottom of the screen.

4. Consolidate? – Select this checkbox to consolidate the case on this line with the main case.

5. Case Number – This read-only column displays the case number to be consolidated.
6. Appellant – This read-only column displays the name of the appellant associated with the case.
7. Judge – This read-only column displays the name of the judge presiding over the case. The name of the judge in this field will be replaced by the name of the judge listed in the “Selected Main Case” field above.

– Select this pushbutton to consolidate the cases that you specified on the “Eligible Case List” table.

This screenshot depicts a successful case consolidation.