Provider Reference Guide

Welcome

Overview *epic* is the program that Oakwood offers to select clients that allows specific Associates to send housing requests and receive multiple housing options from targeted Providers such as yourself. These options are then passed on to the clients for their approval.

Objectives After reviewing this reference guide, you will be able to:

- Use the *epic* Provider Portal to reply on-line to a Request for Housing (RFH).
- Use *epic* Provider Portal to check the status of your RFH replies.

Contents The following topics are addressed in this guide:

Provider Portal Requirements

Web Browser Requirements

Minimum requirements for client machines:

Client Type	Browser: Internet Explorer 6.0	Browser: Internet Explorer 7.0	Browser: Internet Explorer 8.0
• Microsoft Windows 98	X	X	X
• Microsoft Windows NT 4.0	X	X	X
• Microsoft Windows 2000	X	X	X
• Microsoft Windows XP	X	X	X

Notes:

- Internet Explorer 9.0 is not supported at this time.
- You must add https://epic.oakwood.com/ as a trusted site and allow installation of ActiveX controls. *See Appendix A.*
- Please contact your IT department for guidance on how to adjust browser settings.

Operating System Requirements

Minimum requirements for client machines:

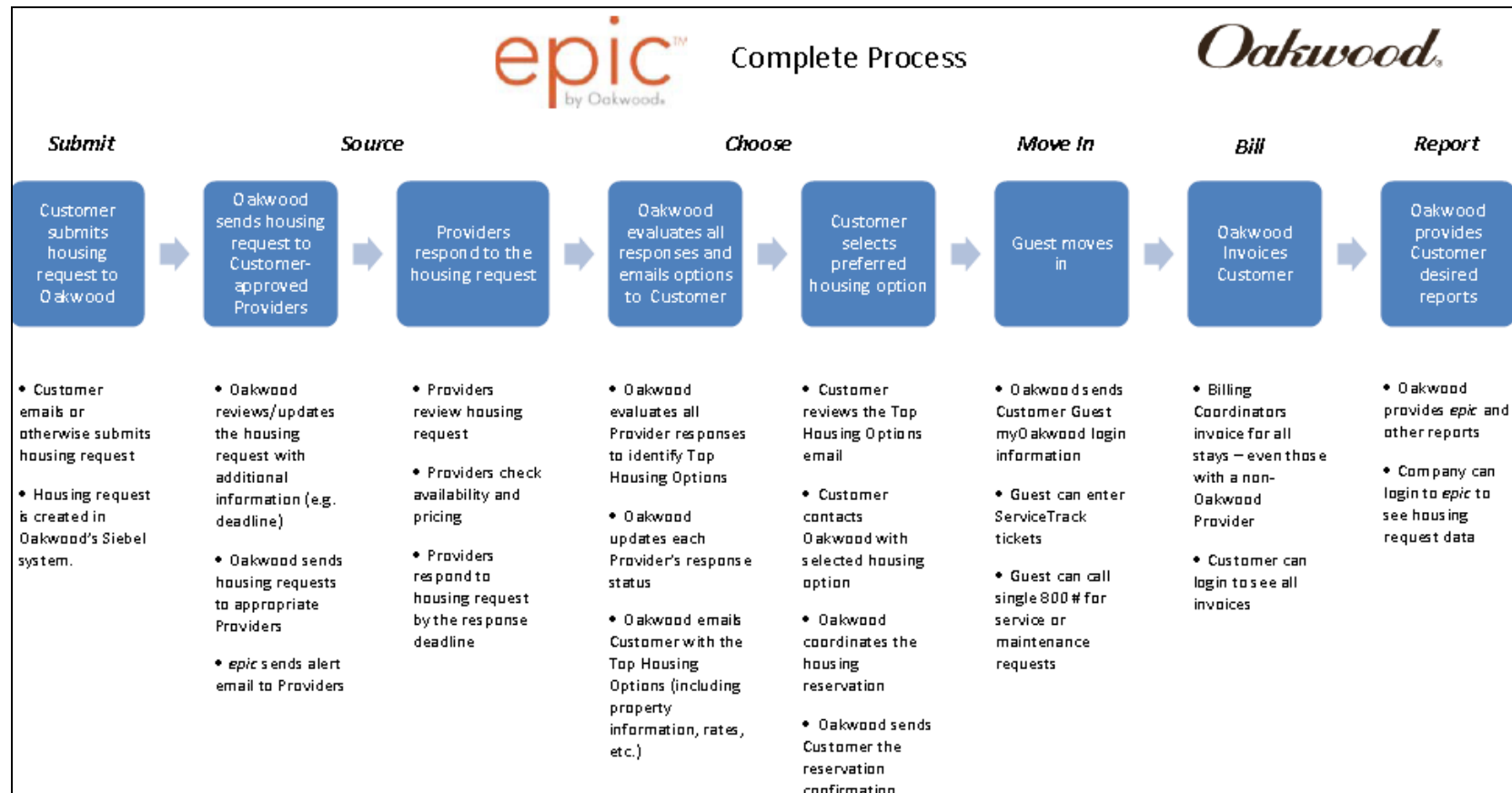| Operating System	Version
• Microsoft Windows NT Workstation	4.0 Service Pack 6a or above
• Microsoft Windows 2000	Service Pack 3 or above
• Microsoft Windows XP Professional	Service Pack 1 or above

Memory Requirements

Minimum memory requirements for client machines:

CPU and Storage Requirements	Windows NT 4.0	Windows 2000	Windows XP
One PII 500 MHz or Celeron 800 MHz class processor, 20 MB of storage	192	224	288

Oakwood's *epic* Process Diagram

Diagram

The Oakwood *epic* Process consists of steps integrating the Providers' involvement in Siebel. The following diagram depicts a high level overview of the process:

epic by Oakwood. — Complete Process — **Oakwood.**

Submit	Source		Choose		Move In	Bill	Report
Customer submits housing request to Oakwood	Oakwood sends housing request to Customer-approved Providers	Providers respond to the housing request	Oakwood evaluates all responses and emails options to Customer	Customer selects preferred housing option	Guest moves in	Oakwood Invoices Customer	Oakwood provides Customer desired reports

- Customer emails or otherwise submits housing request

- Housing request is created in Oakwood's Siebel system.

- Oakwood reviews/updates the housing request with additional information (e.g. deadline)

- Oakwood sends housing requests to appropriate Providers

- *epic* sends alert email to Providers

- Providers review housing request

- Providers check availability and pricing

- Providers respond to housing request by the response deadline

- Oakwood evaluates all Provider responses to identify Top Housing Options

- Oakwood updates each Provider's response status

- Oakwood emails Customer with the Top Housing Options (including property information, rates, etc.)

- Customer reviews the Top Housing Options email

- Customer contacts Oakwood with selected housing option

- Oakwood coordinates the housing reservation

- Oakwood sends Customer the reservation confirmation

- Oakwood sends Customer Guest myOakwood login information

- Guest can enter ServiceTrack tickets

- Guest can call single 800# for service or maintenance requests

- Billing Coordinators invoice for all stays — even those with a non-Oakwood Provider

- Customer can login to see all invoices

- Oakwood provides *epic* and other reports

- Company can login to *epic* to see housing request data

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Oakwood *epic* Process for Providers

Provider *epic* Activities

Listed below are situations when a Provider is required to use the *epic* system:

If ...
• a Provider receives a Request for Housing (RFH) alert email
• a provider needs to review a RFH request and note availability
• a Provider needs to respond to a RFH
• a Provider wants to check the RFH status

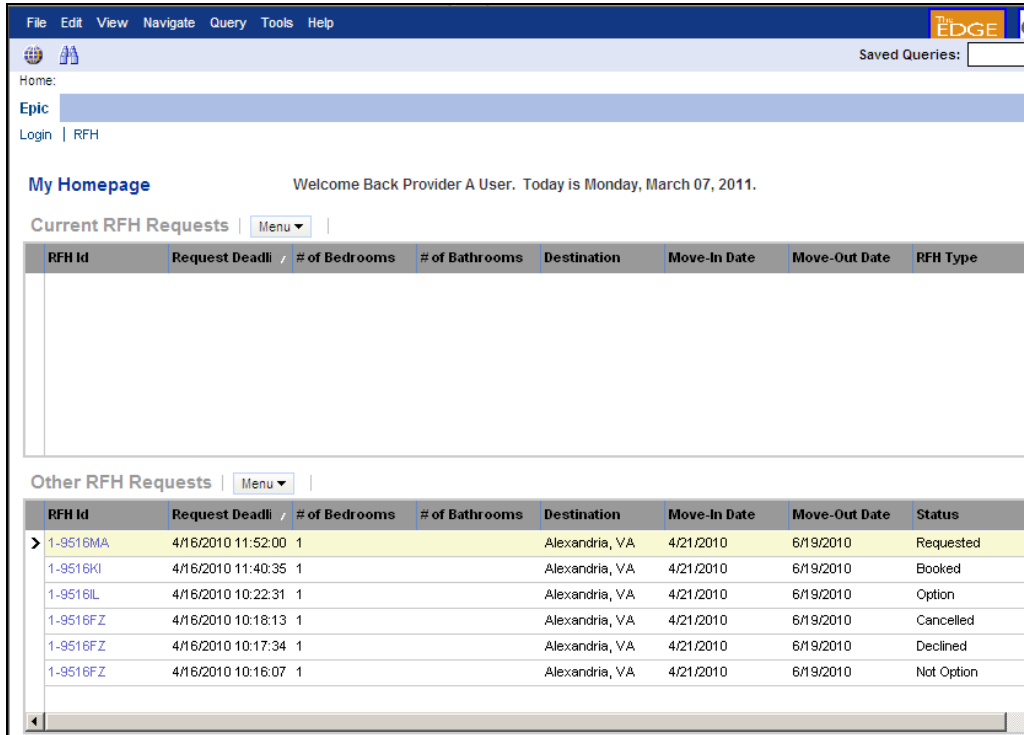# Logging in to *epic*

Accessing the Provider Portal Site

Follow the steps, as outlined below, to access the *epic* Provider Portal.

Step	Action
1	Type the following URL into an available browser window: https://epic.oakwood.com *OR* Click the available hyperlink within the RFH alert email. Dear 906 - Oakwood, This is an automatic email notification of a new or updated housing request (RFH Id OAK_308552), seeking housing in Anaheim, CA. Please go to https://epicqa.oakwood.com to access epic to view this housing request and submit your response. The housing deadline is 09/13/2010 15:54:28 (GMT-07:00) Arizona. Thank you, <u>Result:</u> An *epic* log in screen will appears. <u>Note:</u> If you don't see the login page, refer to page 3 Web Browser Requirements and Appendix A.
2	Enter the appropriate User ID and Password. epic by Oakwood **User Login** User ID:* Password:* ☐ Remember my User ID and Password OK
3	Click OK. <u>Result:</u> Upon entering the correct log in criteria, Providers are directed to the *epic* Homepage.

Logging in to epic, Continued

Diagram   An example of an *epic* Homepage.

Features of the Homepage

Listed below are the main features of the Home Screen and their functions:
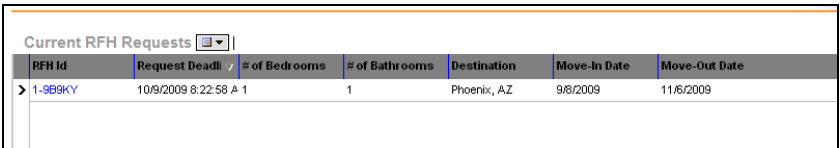
Part	Function
Current RFH Requests Applet	Lists only those that belong to the specific Provider logged on and that are designated as "In Progress". (These housing requests are currently being worked.)
Other RFH Requests Applet	Lists all RFH Requests that have a status other than In-Progress. (These housing requests have been worked on or cancelled.)

Note: The Queries drop-down box, magnifying glass icon, and binocular icon are out-of-the-box features that have been disabled.

Reviewing a RFH Request

Reviewing a RFH Request's Details
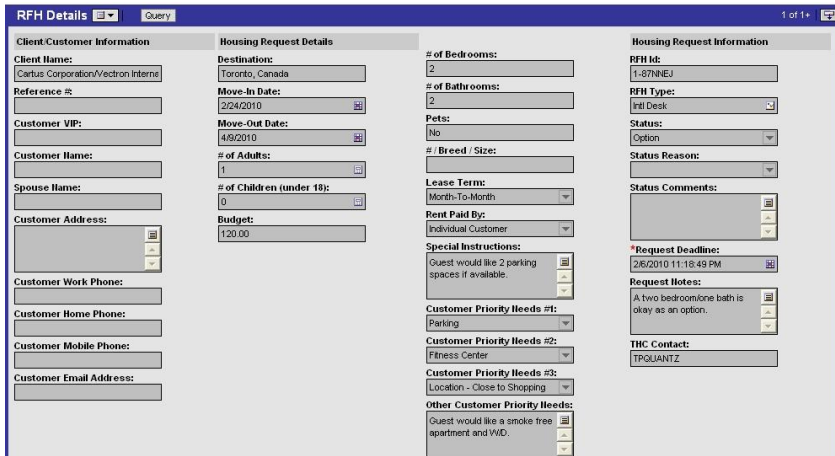
Follow the steps, as outlined below, to review the details within a RFH request.

Step	Action
1	Upon being directed to the *epic* Homepage, locate the Current RFH Requests applet. Current RFH Requests RFH Id / Request Deadli / # of Bedrooms / # of Bathrooms / Destination / Move-In Date / Move-Out Date > 1-9B9KY 10/9/2009 8:22:58 A 1 1 Phoenix, AZ 9/8/2009 11/6/2009 Note: The Current RFH Request applet lists only those that belong to the specific Provider logged on and that are designated as "In Progress".
2	Click the RFH ID hyperlink corresponding to the RFH desired. Current RFH Requests RFH Id / Request Deadli / # of B > 1-9B9KY 10/9/2009 8:22:58 A 1 Result: The Provider will be redirected from the Homepage to the Request for Housing Screen where the RFH request's details may be viewed in further detail.
3	The Provider must ensure they read the request's details, taking care to note the following fields: • Destination • Dates of arrival and departure • Request Deadline • Special Instructions • Customer Priority Needs • Other Customer Priority Needs Note: Until the Customer has chosen the Provider as a housing option, the Client/Customer information will remain blank.

Reviewing a RFH Request, Continued

Reviewing a RFH Request's Details (continued)

Step	Action
4	Proceed by checking for, and locating, apartment availability according to the criteria mentioned in the RFH's details.

Responding to a RFH Request

Responding to a RFH with a Single Option
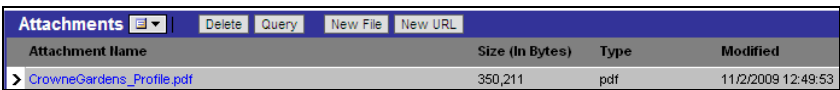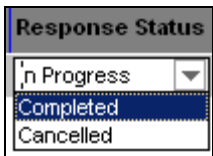
Follow the steps, as outlined below, to respond to a RFH Request with an option.

Step	Action
1	Click the RFH ID hyperlink.
2	Input the appropriate information regarding the available option while ensuring all system-required fields are complete.

Field	Description
Property Name	Name of the option's community.
• Street Address • City • State • Country	Document option's location information.
Property Type	Use the drop-down menu to select Core (local market) or Wholesale (remote area).
Daily Rate	The Daily Rate input should account for any additions made or discounts taken. Adjustment reasons can be notated in the Response Comments field.
Tax	Use the drop-down menu to determine tax details.
% Discount	The Discount field is used for client tracking purposes. If a discount was given, please input the percentage amount into this field.
Apt Type	Use the drop-down menu to select the option's size.
Response Status	Use the drop-down menu to select the appropriate status.

Property Name	Street Address	City	State	Zip/Postal Code	Country

Important: If specific items are requested in guest priority needs (e.g. cable, roll away bed, crib, etc.), these costs should be added into the Daily Rate and then explained in the Response Comments section noting that the rate is inclusive.

Responding to a RFH with a Single Option
(continued)

Step	Action
3	Use the Response Comment field to add free-form text regarding the housing option submitted. Notes: • The information entered is forwarded to the client and assists in selling your housing option. • Comments should be checked for correct spelling, grammar, and punctuation. • The first 1-3 lines should address all the guest priority needs highlighted in the original request.
4	Scroll down to the Attachments section and use the New URL or New File buttons to incorporate any necessary information into the response. Attachments | Delete Query New File New URL Attachment Name Size (In Bytes) Type Modified CrowneGardens_Profile.pdf 350,211 pdf 11/2/2009 12:49:53
5	Once all information is complete and all attachments attached, use the available drop-down menu and change the RFH request status to "**Completed**." Response Status In Progress Completed Cancelled Note: The housing option/s submitted within the RFH Response must be held for the allotted time as designated within the request or company policy to allow time for the customer to make their selection.

Notes:
• Once a Provider marks a response as "Completed", the response is time stamped and formatted as read-only.
• A Provider can only edit a response if the request deadline has not passed.
• To edit a response, prior to the request deadline expiration, set the Response Status field to In-Progress. Make the applicable changes and use the Response Status drop-down menu to once again select Completed.
• A Provider can cancel their response at any time if the response is no longer valid.
• Utilize the "Cancelled" Response Status and complete the Status Cancelled and Response Comments fields to document inventory options are unavailable.

Responding to a RFH Request, Continued

Responding to a RFH with Multiple Options

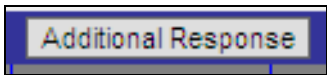Follow the steps, as outlined below, to respond to a RFH Request with multiple options.

Step	Action
1	Click the RFH ID hyperlink.
2	Input the appropriate information regarding the available option while ensuring all system-required fields are complete.

Field	Description
Terms and Conditions	Read the hyperlinked document.
Accept Terms and Conditions	Use the drop-down menu to select Yes.
Property Name	Name of the option's community.
• Street Address • City • State • Country	Document option's location information.
Property Type	Use the drop-down menu to select Core (local market) or Wholesale (remote area).
Daily Rate	The Daily Rate input should account for any additions made or discounts taken. Adjustment reasons can be notated in the Response Comments field.
Tax	Use the drop-down menu to determine tax details.
% Discount	The Discount field is used for client tracking purposes. If a discount was given, please input the percentage amount into this field.
Apt Type	Use the drop-down menu to select the option's size.
Response Status	Use the drop-down menu to select the appropriate status.

Property Name	Street Address	City	State	Zip/Postal Code	Country

Important: If specific items are requested in guest priority needs (e.g. cable, roll away bed, crib, etc.), these costs should be added into the Daily Rate and then explained in the Response Comments section noting that the rate is inclusive.

Responding to a RFH with Multiple Options (continued)

Step	Action
3	Use the Response Comment field to add free-form text regarding the housing option submitted.
4	Scroll to the Attachments section and use the New URL or New File buttons to incorporate any necessary information into the option.
5	Use the Additional Response button to submit an additional option. Additional Response Result: A new response record will be created for the Provider to complete.
6	Complete steps 2-4 for subsequent request responses. Note: Any option limits will be set within the request. An error will pop up if a Provider is over the allotted amount of option responses.
7	Once all information is complete and all attachments attached, use the available drop-down menu and change the RFH request status to "Completed." Note: The housing option/s submitted within the RFH Response must held for the allotted time as designated within the request or company policy to allow time for the Customer to make their selection.

Notes:
- Once a Provider marks a response as "Completed", the response is time stamped and formatted as read-only.
- A Provider can only edit a response if the request deadline has not passed.
- To edit a response, prior to the request deadline expiration, set the Response Status field to In-Progress. Make the applicable changes and use the Response Status drop-down menu to once again select Completed.
- A Provider can cancel their response at any time if the response is no longer valid.
- Utilize the "Cancelled" Response Status and complete the Status Cancelled and Response Comments fields to document inventory options are unavailable.

Response Reminder Email

Overview   To ensure responses are received prior to the deadline included in the request, a reminder email is sent to all Providers. This email is sent an hour before the request deadline to Providers who have a pending request with a *Response Status* of "In-Progress".

Though the email is similar in look and feel to the new RFH or status update emails, it differs especially in the subject line where "REMINDER:" is clearly included.

Diagram   An example of a reminder email.
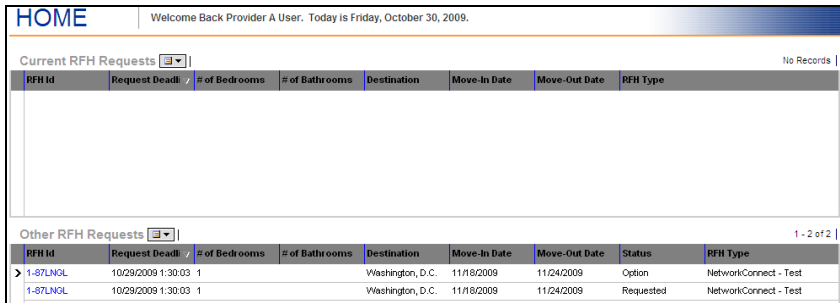


```
From:        epicadminqa@oakwood.com
To:          other@epic.com; Juang Luong
Cc:
Subject:     REMINDER: Oakwood Global Solutions RFH Due Within the Hour

 Hello!

 Please refer to the RFH below which is due before the next hour.
 Thank you - and good luck on winning this business!

 RFH Type: Oakwood Global Solutions
 Provider: Other
 RFH ID: 1-A33SE3
 RFH Status: Requested
 Deadline: 10/04/2011 08:03:33 (GMT-08:00) Pacific Time (US & Canada); Tijuana
```

Reviewing RFH Responses Submitted

Reviewing RFH Response Submitted

The portal has the ability to display all of a Provider's RFH Responses – the original and any additional that may have been submitted.

Providers may review submitted RFH Requests by following the steps as outlined below.

Step	Action
1	Log into the *epic* Provider Portal.
2	Click on the Home Screen tab. Result: Two applets appear – Current RFH Requests and Other RFH Requests.
3	From the Other RFH Requests section, click on the desired RFH ID hyperlink/s to see the individual response. Note: Each additional response made will appear as a new record within that same RFH ID.

Checking the RFH Status After Submission

Checking on the RFH's Status

Providers will receive an email notification if the customer has chosen the Provider's option. However, should a Provider wish to be proactive, a Provider can check on the RFH status once the request deadline has passed.

Providers may check on the RFH's status by following the steps as outlined below:

Step	Action
1	Log into the *epic* Provider Portal.
2	Locate the Other RFH Request section on the Homepage.
3	Scroll through the RFHs listed to locate the desired record.
4	Click on the RFH ID hyperlink of the desired record for more detail. Note: Refer to the Status, Status Reason and Status Comments fields for additional information.

Status Definitions

Provided in the table below are the different types of statuses, that can be attached to a RFH, along with their meaning:

Status	Definition
• Option	This response has been chosen as one of the top options and will be presented to the Customer.
• Not Option	This response was not chosen as one of the top options and will not be presented to the Customer.
• Booked	This is the option the Customer chose. Note: When the Customer decides to book with the Provider, the client/customer information displays in the details area of the request.
• Declined	This response was presented as a top option but was not chosen by the Customer.
• Cancelled	The request is no longer valid.

Updating the RFH Request After Move-In

Updating the Actual Move-In Date

When your housing option is selected by the client and after they move-in, the Actual Move-In Date field must be updated as it might not match the original move-in date noted within the RFH Request. Follow the steps as outlined below to enter the actual move-in date:

Step	Action
1	Log into the *epic* Provider Portal.
2	Locate the Other RFH Request section on the Homepage.
3	Scroll through the RFHs listed to locate the desired record.
4	Click on the RFH ID hyperlink of the desired record.
5	In the response window, scroll to the far right and locate the Actual Move In Date field.
6	Enter the actual date that the client moved in. | Response Timestamp	Submitted By	Actual Move In Date
---	---	---
5/1/2012 6:36:13 AM	PROVIDERC	5/11/2012	
7	Enter Ctrl + S to save your entry.

Updating the RFH Request After Move Out

Updating the Actual Move-Out Date

When the client vacates from their housing, the Actual Move-Out Date field must be updated as it might not match the original move-out date noted within the RFH Request. Follow the steps as outlined below to enter the actual move-out date:

Step	Action
1	Log into the *epic* Provider Portal.
2	Locate the Other RFH Request section on the Homepage.
3	Scroll through the RFHs listed to locate the desired record.
4	Click on the RFH ID hyperlink of the desired record.
5	In the response window, scroll to the far right and locate the Actual Move Out Date field.
6	Enter the actual date that the client moved out. | Response Timestamp	Submitted By	Actual Move In Date	Actual Move Out Date
---	---	---	---
5/1/2012 6:36:13 AM	PROVIDERC	5/11/2012	7/10/2012	
7	Enter Ctrl + S to save your entry.

RFH Scenarios

Overview   The scenarios listed below address common situations a Provider may encounter. Each Situation has a precondition and lists What to Do in a shorthand way that assumes familiarity with the details presented elsewhere in this guide.

Situation	**Provider needs to log in to Partner Portal**
Precondition	*Provider received RFH alert email*
What to do	Provider clicks on the hyperlink in the email. Internet Explorer opens a new window with the login page. Provider enters login ID and password and clicks enter.

Situation	**Provider needs to review RFH request**
Precondition	*Provider logged into Partner Portal*
What to do	Provider locates the RFH ID in the Current RFH Requests applet and clicks on the RFH ID hyperlink. Reviews request details in the Request for Housing screen.

Situation	**Provider needs to enter a RFH response**
Precondition	*Provider is on the Request for Housing screen.*
What to do	Provider fills out the required fields in the list applet. The Information entered is automatically saved.

Situation	**Provider needs to indicate a response status of complete**
Precondition	*Provider is on the Request for Housing Screen*
What to do	Provider changes status from "In Progress" to "Completed". All fields change format to read-only.

Situation	**Provider needs to indicate that the property is no longer available/applicable for the RFH request**
Precondition	*Provider is on the Request for Housing Screen*
What to do	Provider changes status to "Cancelled", documents a Status Cancelled reason and adds comments into the Response Comment field. The RFH fields remain read-only.

Situation	**Provider wants to check the status of the RFH request**
Precondition	*Provider is logged into Partner Portal*
What to do	Provider locates appropriate RFH ID in Other RFH Requests section. Provider clicks on hyperlink and reviews Status/Status Reason/Comment fields.

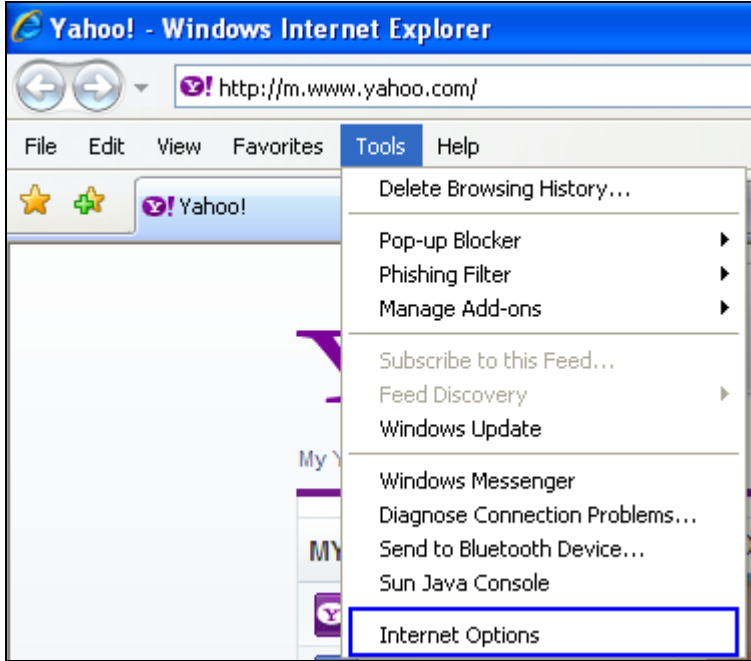| Situation	**Provider needs to book the reservation**
Precondition	*Provider receives email notice; Provider is logged into Partner Portal*
What to do	The Provider locates the RFH ID and clicks on the hyperlink. The system will display the Request for Housing screen and the Provider will use the RFH data to make the appropriate reservation.

Additional Information

Support Resource

For *epic* questions, please call your Oakwood *epic* Contact or email epic@oakwood.com.

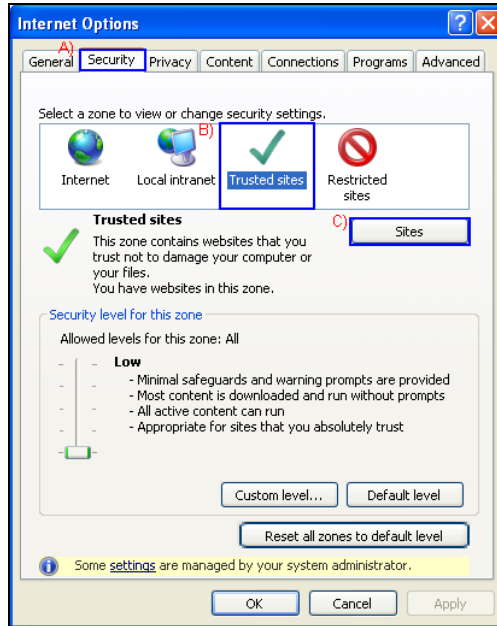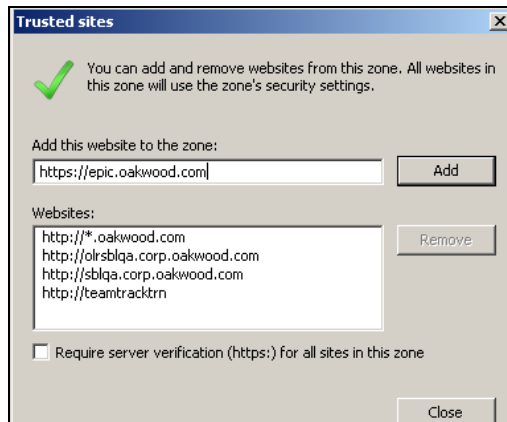# Appendix A – Setting Trusted Sites

Adding *epic* as a Trusted Site

Follow the steps as outlined below to add *epic* as a Trusted Site:

Step	Action
1	From an Internet Explorer window, click Tools and then Internet Options.

Appendix A – Setting Trusted Sites, Continued
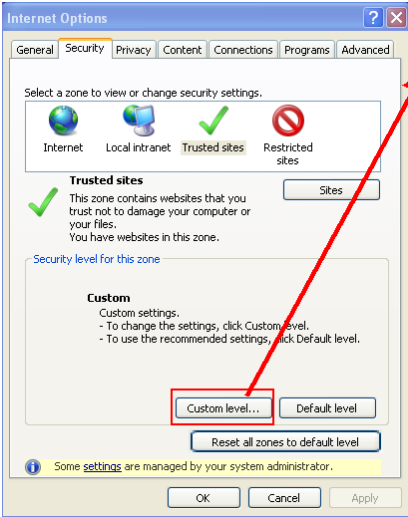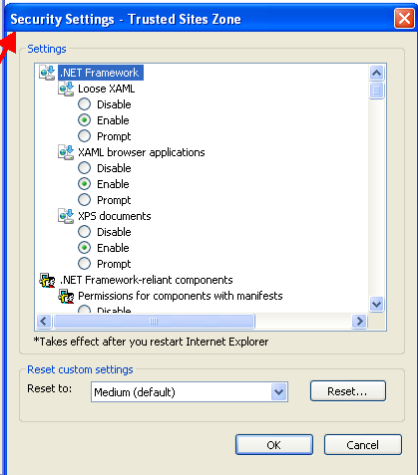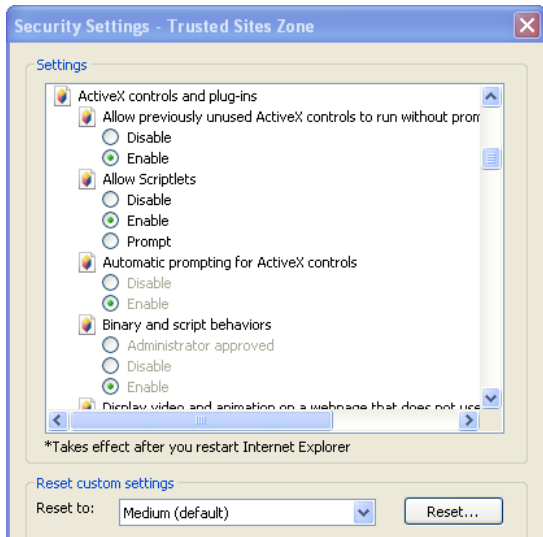
Adding epic as a Trusted Site
(continued)

Step	Action
2	From the Internet Options window, click the Security Tab. Click on the Trusted Sites icon then click Sites.
3	Add the *epic* web address (https://epic.oakwood.com/) in the Add this Web site to the zone field and click the Add button. **Important:** An alternative option to add is http://*.oakwood.com.

Appendix B – Active X Settings

Internet Explorer (IE) 7: Active X Settings

Follow the steps, as outlined below, to verify Active X settings.

Step	Action
1	From an Internet Explorer window, click Tools>Internet Options/Security Tab>Custom Level… button. Note: Security Settings pop up window will appear.
2	Depending on the Internet Explorer version, please refer to the appropriate screenshot to ensure the set up are as follows. IE7:

Appendix B – Active X Settings, Continued

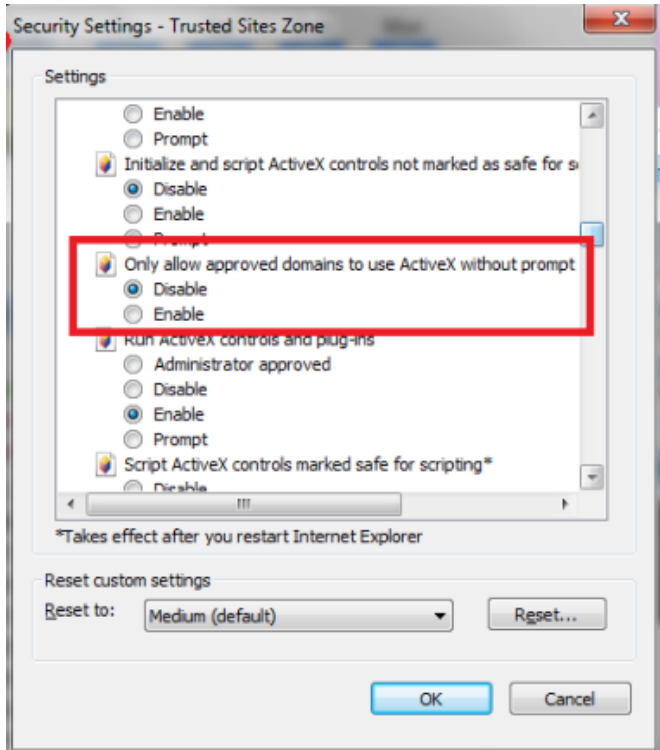**Internet Explorer (IE) 7:**
Active X Settings (continued)

Step	Action
2 contd.	IE7, contd.:

Appendix B – Active X Settings, Continued

Internet Explorer (IE) 8: Active X Settings

Step	Action
1	IE 8: Maintain the same settings as listed above for IE 7 in addition to the image below.

Appendix C – Verify Additional IE 8 Settings

SSL Settings   Verify the Use SSL 2.0 option, on the Internet Options>Advanced tab, is checked.
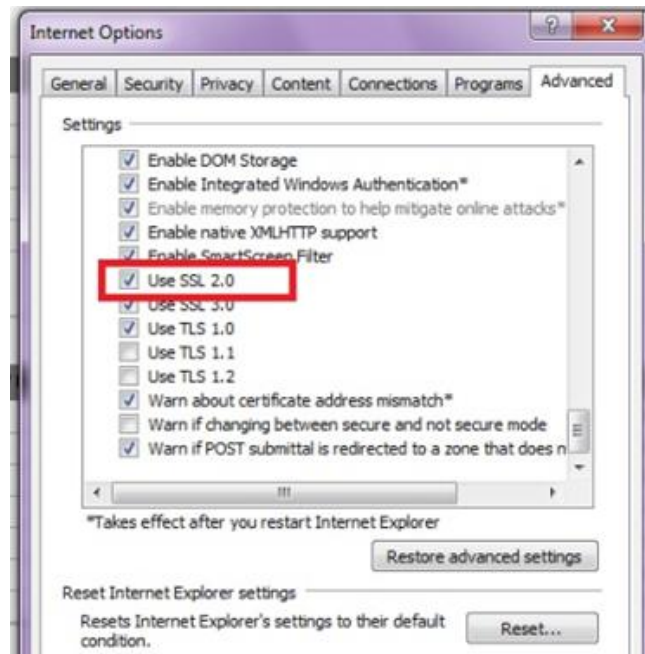
Cipher Strength Setting   Verify the Cipher Strength setting is 128-bit.