Reallocation Request (EPM)

The Reallocation Request form is used to route reallocation requests for processing and action. Reallocation requests are entered in ProjectTeam by the EPM using the form and submitted to BDI for processing using the available workflow available for the form.

Once the request is received by BDI, they will process the request and update the record in ProjectTeam with the tracking information as required.

Reallocation request progress can be viewed at any time by opening the submitted request, viewing the Workflow progress section, and viewing the tracking information in the fields provided. You can also configure your Log View for the Reallocation Requests and view/sort/filter tracking information for one or more requests there.

NOTE: The submitting EPM is responsible for attaching a copy of any required supporting documentation prior to submitting the request.

Creating and Submitting a Reallocation Request

1. Open the **DGS Portfolio** project and click on **Forms** in the navigation menu**.**
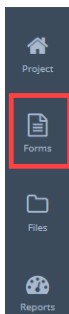
2. In the search field, begin typing **Reallocation** and the form will appear in the forms list. Click **Reallocation Requests** to open the log.
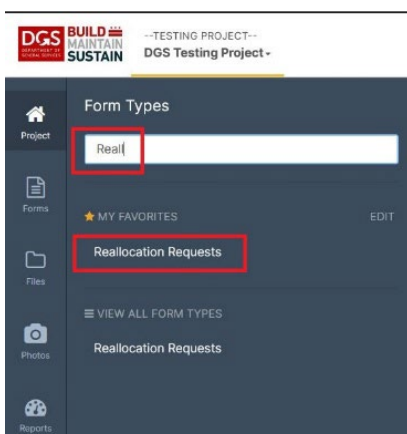
3. Click the **New** button in the upper right corner to create a new Reallocation Request. The **New Reallocation Request** details window will open.


4. Enter the appropriate information in all fields accessible to you on the form. Do not leave blank fields.

5. Use the **Tool Tips** for information regarding the specific requirements and expected data for each field. Click on the blue circled question mark next to each field name to see the **Tool Tip** for that field.

6. Click on the **Save & Start Workflow** button at the top-right of the form when all the fields have been completed.

7. Select the **Submit Reallocation Request** workflow with the checkbox and then click the **Start Workflow** button.
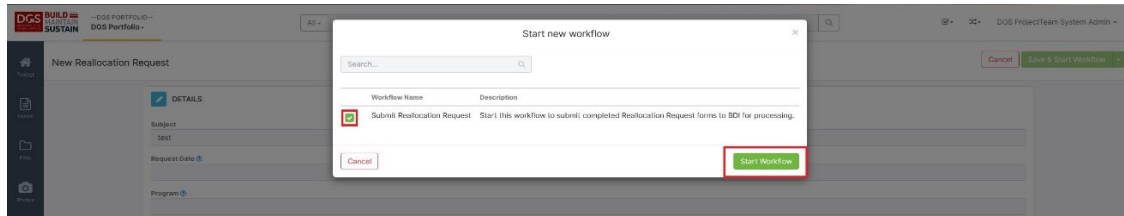
8. Drag and drop a copy of any relevant supporting documentation in the **Attachments** section of the record.
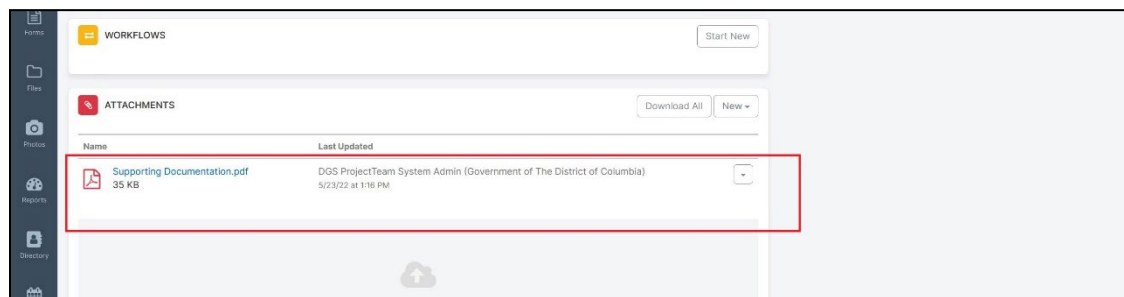
9. Click **Share** and share the record with all applicable share groups that were not included in the autoshare from the workflow. At minimum, share with the following **Share Groups** not included in the workflow:

    Applicable EPM Share Group
    Appropriate Client Agency Share Group
    Other DGS Divisions involved with the MOU