

Inquiry Response Options in PIER

Add Note

An internal note only seen by PIER Users who are logged on inside the system. If PIER Users are selected in the Forward/Assign to area, an email notification will be sent to these individuals regarding your note.

The screenshot shows the 'Response' section with radio buttons for 'Add Note', 'Log Response', 'Add Inquirer Follow-up', and 'Send Email Response to Inquirer'. The 'Forward/Assign' dropdown menu is open, showing a list of names: No One, Barclay, Carmen, Baron, Gerald, Boox, Kevin, Cole, Matt, and Hinman, Holly. Below the menu is a 'Select Answer' dropdown and a text area containing the text: 'Gerald and Kevin, I'm not sure how to answer this one. Have we decided on the policy?'.

Log Response

An internal note only seen by PIER Users who are logged on inside the system. Records a response that was given to an inquirer, usually via phone or outside email exchange. Responses given via an outside email exchange may be pasted into the text area.

The screenshot shows the 'Response' section with radio buttons for 'Add Note', 'Log Response', 'Add Inquirer Follow-up', and 'Send Email Response to Inquirer'. The 'Forward/Assign' dropdown menu is open, showing a list of names: No One, Barclay, Carmen, Baron, Gerald, Boox, Kevin, Cole, Matt, and Hinman, Holly. Below the menu is a 'Select Answer' dropdown and a text area containing the text: 'I phoned Mr. Smith and told him he could safely return to work tomorrow morning.'.

Add Inquirer Follow-up

An internal note only seen by PIER Users who are logged on inside the system. Records additional questions, comments, feedback from the inquirer if an ongoing conversation takes place.

The screenshot shows the 'Response' section with radio buttons for 'Add Note', 'Log Response', 'Add Inquirer Follow-up', and 'Send Email Response to Inquirer'. The 'Forward/Assign' dropdown menu is open, showing a list of names: No One, Barclay, Carmen, Baron, Gerald, Boox, Kevin, Cole, Matt, and Hinman, Holly. There is also a checkbox for 'Include Notification List Users' which is checked. Below the menu is a 'Select Answer' dropdown and a text area containing the text: 'Ms. Lerner phoned on 8/20 to confirm our meeting on Tuesday.'.

Send Email Response to Inquirer

Message typed into the text area is emailed from the PIER System to the inquirer.

The screenshot shows the 'Response' section with radio buttons for 'Add Note', 'Log Response', 'Add Inquirer Follow-up', and 'Send Email Response to Inquirer'. The 'Forward/Assign' dropdown menu is open, showing a list of names: No One, Barclay, Carmen, Baron, Gerald, Boox, Kevin, Cole, Matt, and Hinman, Holly. Below the menu is a 'Select Answer' dropdown and a text area containing the text: 'Dear Mr. Lerner, Thank you for your inquiry. I would be happy to schedule a phone meeting with you this week. Tuesday afternoon is a good time.'.

Workflow for Document Creation in PIER

To Edit a Published Document, you must first Unpublish it
and go back to draft form

