SEMS Quick Reference Guide
Party Details, Site Association & Party Search

May 2017

1 PURPOSE

The purpose of this quick reference guide is to provide instructions to users for managing party information and party associations to sites in SEMS. Party information includes party name, address, party involvement, party type, and liability information for a specific site. Sites the party is currently associated with are also managed on these screens.

1.1 Accessing Party Information & Site Associations

Users can access party information and site associations in the following ways:

- By selecting a site on the SEMS site schedule and then selecting the **Party Association/Search** drop-down from the **Site Schedule** menu navigation (Figure 1).
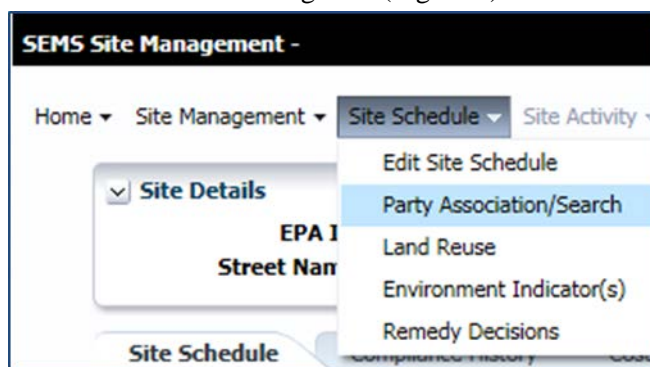

Figure 1. Party Association/Search Menu Item

- By selecting the **Manage Party Information** drop-down from the **Site Management** menu navigation (Figure 2) and using the various search filters to search for a party among all parties entered in SEMS.
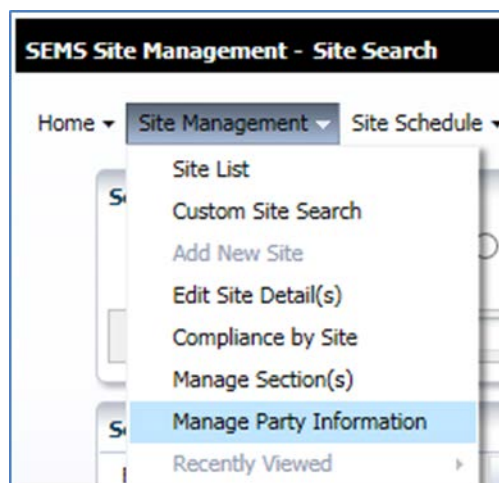
Figure 2. Navigation Menu for Manage Party Information

2 PARTY ASSOCIATION/SEARCH SCREEN

The **Party Association/Search** screen allows SEMS users to view and manage party information for the selected site. There are two tabs (Figure 3):

1. Parties Currently Associated to the Site
   - □ Note that users can access the Manage Party Information module from this tab
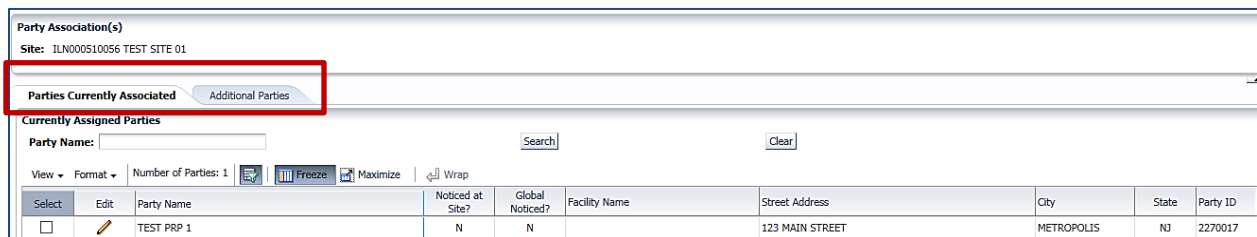2. Additional Parties

Figure 3. Party Association(s) Screen

2.1.1 Parties Currently Associated Tab

The **Parties Currently Associated** tab (Figure 3) allows users to view and search on all parties currently associated to the selected site; to disassociate the Party from the selected site, if not noticed at site; and select a party to edit.

- ■ To disassociate a party from the site, select or highlight the party, and select the **Disassociate Party from Site** button [Disassociate Party from Site]
- ■ To edit the Party details, select the edit button ✎ to access the **Manage Party Information** Module

2.1.1.1 Manage Party Information

After selecting the edit button ✎ next to a Party Name, users see the Manage Party Information screen with four tabs: Summary, Party Details, Associated Sites, and Contacts.

- ■ **Summary** tab allows users to view a summary of all the Party information for the associated site as well as view the list of sites currently associated with the selected party
- ■ **Party Details** tab allows users to edit the information for the selected party
- ■ **Associated Sites** tab allows users to view the sites associated to the selected Party, and associate a site to the selected Party
- ■ **Contacts** tab allows users to view Contacts associated to the Party and add a new Contact
- ■ Two button are also available at the top of each tab to navigate to Site Associations and Party Search [Site Associations Party Search]

2.1.1.1.1   Summary Tab

On the **Summary Tab**, Users see a summary of the data in the Manage Party Information module: summary of the selected Party Information, including Party Name, Address, and Party Type; Associated Sites; Contacts; and Activities.

Figure 4. Manage Party Information, Summary Tab

2.1.1.1.2   Party Details Tab

On the **Party Details** tabs, users are able to enter and edit the Party Name, address, and contact information; Involvement Type; Liability Indicator; and Party Type. Users select the Save button after entering the required data.

Figure 5. Manage Party Information, Party Details Tab

2.1.1.1.3   Associated Sites Tab

There are three features on the Associated Sites tab that allow users to:

- View the list of sites currently associated with the selected Party
- View a list of available sites that may be associated with the selected Party
- Select an available site to associate to a Party and enter the required association information

Figure 6: Manage Party Information, Associated Sites Tab

2.1.1.1.4   Contacts Tab

The Contacts tab (Figure 7) allows users to add a new contact for the party or edit information about existing contacts.

Existing contacts appear in the table. When users select the row of the contact, the information appears on the form below where they may edit the information.

To add a new contact, users select the Add Contact button and complete the fields. The following fields are required: First Name, Last Name, Address, City, State, Zip Code and Role.

Users select the Save button when complete.

Figure 7. Contacts Tab

2.1.2 Additional Parties

The **Additional Parties** tab is available for users to search for and select an existing party to associate to the selected site or to access the **Manage Party Information** screen to add a new party that may then be associated to the site.

2.1.2.1 Associate Additional Parties to a Site

Users can search for and select additional parties to associate with a site. To find a party, users can navigate through the list of parties in two ways:

- By searching on Party Name, Party Alias, City, State, and the Global Notice indicator (Figure 8)

- By selecting the pagination buttons: First, Previous, Next, Last

Users select the radio button in the Select column next to the relevant Party Name; and select an Involvement Type and Liability Indicator to describe the party's association with the site (Figure 8). Users select the Save and Associate to Site button to save the Party to the Site or select the Reset button to revert the values back to their original value.

Figure 8. Additional Parties Tab
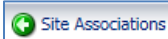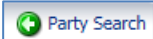
2.1.2.2   Add a New Party

The **Party Details** tab within the **Manage Party Information** module is displayed when users select the **Add New Party** button Add New Party from the **Additional Parties** tab located at the bottom right-hand corner of the screen. Users can enter information about a new party to be associated to the site (Figure 9), including Party Details (Party Name, Address City, State, and Zip Code are required), Involvement Type, and Liability Indicator.

Figure 9. Manage Party Information, Party Details Tab

Users select the **Save** button Save to add the new party or select the **Cancel** button Cancel to exit the screen. User can navigate to the **Site Associations** screen by selecting the **Site Association** button Site Associations ; and the **Party Search** screens by selecting the Party Search button Party Search .

3   MANAGE PARTY INFORMATION BY SEARCHING FOR A PARTY AMONG ALL PARTIES

After selecting the **Manage Party Information** option from the **Site Management** top navigation menu, users can view the list of all parties in the SEMS Site Management application, filter the list, and select to edit the **Party Details** (Figure 10).

Figure 10. All Parties, Search for Parties Screen
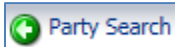
3.1   View & Filter All Parties

All Parties in the Site Management application are listed by default. Users can filter the list of Parties by typing in the **Party Name**, **Alias**, and **City**; selecting the **Global Noticed** flag; and selecting a **State.** The filters are inclusive: the Party must meet all the criteria entered in order to be displayed in the **Search Results** table. Users can change the columns displayed in the **Search Results** table using the **Manage Columns** feature.

3.2   Party Information

Users can edit the details for the Party by selecting the edit button [edit icon] next to the **Party Name** in the **Search Results** table. The application displays the **Party Details** screen for the selected Party. In addition, users can disassociate an existing site on this screen, or select to associate a Site to the selected Party.

3.2.1   Edit Party Details

Users can edit the **Party Name**, **Alias**, **Address**, **City**, **State**, **Zip Code**, and **Party Type** on the screen (Figure 11). In addition, users can navigate to the **Party Search** by selecting the **Party Search** button [Party Search button] .
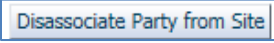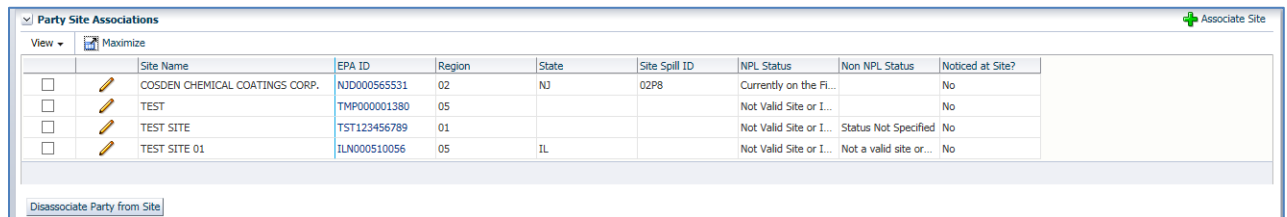

Figure 11. Party Details Screen

3.2.2   Party Site Associations

In the Party Site Associations table, users can disassociate a Party from the selected site and select to edit the Party Information for the site.
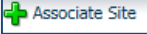
- To disassociate an existing site from the selected Party, users select the checkbox next to the **Party Name** (Figure 12) and then select the **Disassociate Party from Site** button

  | Disassociate Party from Site | .

- To edit the Party Information for a site, users select the edit button next to the **Site Name**. This navigates users to the **Manage Party Information** module for the selected site.
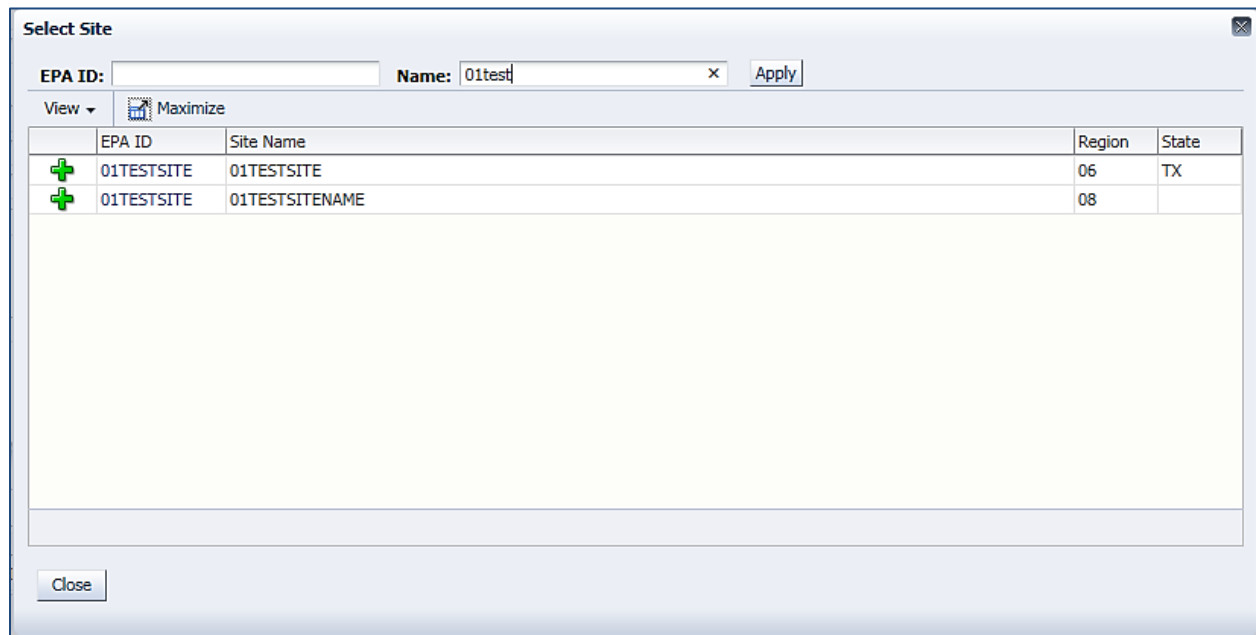

Figure 12. Party Site Associations Section

3.2.3   Associate Site to Party

To associate a site to the selected Party, users select the **Associate Site** button. The application displays a pop-up window that allows users to search for a site to associate to the Party (Figure 13). Users select the green plus sign next to the EPA ID to associate the Site.

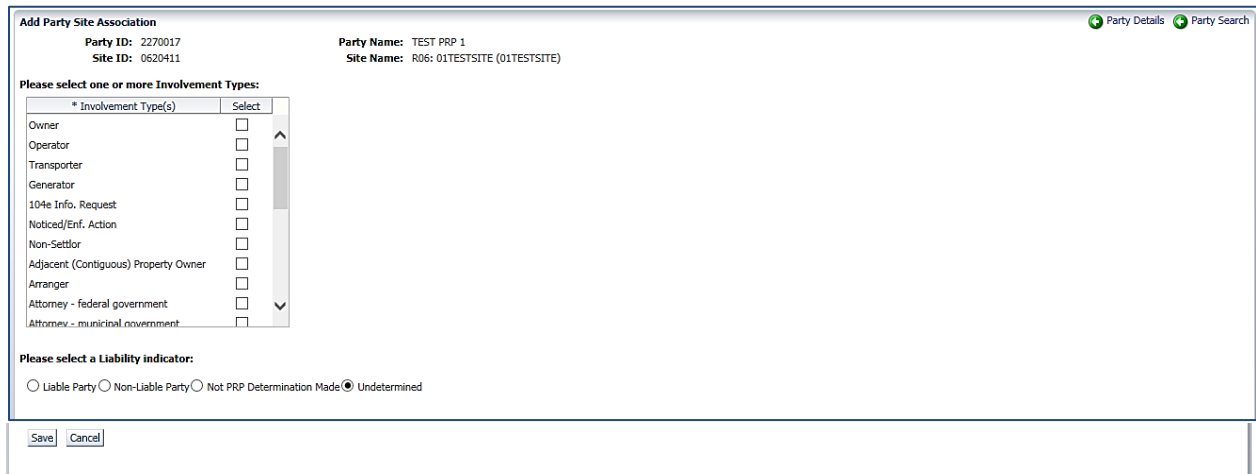*Figure 13. Select Site to Associate Pop-up*

After users select to associate the Site, the application displays the **Add Party Site Association** screen (Figure 14). On this screen, users select one or more **Involvement Types**, and one **Liability Indicator**. The default **Liability Indicator** is 'Undetermined' However users should always select the appropriate

liability indicator i.e., Liable Party, Non-Liable Party, Not PRP Determination Made or Undetermined. Users select the **Save** button [Save] to save the association.

Figure 14. Add Party Site Associations

Users can select the **Party Details** button [Party Details] to navigate to the screen to edit the information about the Party and the **Party Search** button [Party Search] to find another Party to associate with the selected Site.