Sourcing quality engineers (SQEs), sourcing quality leaders (SQLs), and engineers create corrective actions (CAs) to prevent problems from occurring again. Users from the buyer organization must decide whether or not a CA is required before the SDR/deviation detail is advanced to the QUALITY REVIEW status or beyond. The majority of the time, a CA will be created from the SDR. If necessary, however, users can manually create CAs which can later be associated to an existing SDR.

Understanding the Corrective Action Screen

This screen is made up of multiple areas that are used for specific purposes, as described below:

Corrective Action Toolbar – this area displays the status of the corrective action (CA), contains buttons used to Save, Email, Route, Export, and Spell Check the CA, and allows the user to switch between the quality roles assigned to their user profile. A Lock for Edit icon appears when you view an existing CA.

Header Information – this area contains information that applies to the entire corrective action (CA), such as the creation date, CA number, and details about the buyer organization that will oversee the CA process. The severity of the CA is also set in this area.

Attachments – this area allows users to add files to the corrective action. Any user with a quality role associate to their user profile can view or delete attachments that have been added to the CA. In order to add or remove attachments, the CA must be locked.

Supplier Information – this area contains the contact and location information for the supplier to whom the corrective action (CA) belongs. The values available in the drop-down lists are based on the suppliers and supplier locations assigned to your user profile. In addition, the expected closure date for the CA is set in this area.

Other Information – this area contains part information that is transferred from the SDR and deviation detail, such as the item number, deviation quantity, serial numbers, commodity, and cause code.

Descriptions – This is the largest area of the screen and contains the description of the event, root cause analysis, corrective action description, preventative action description, and an area for additional comments.

Creating Corrective Actions

There are two ways to create a corrective action: [1] from an existing SDR or [2] as a new document that can later be associated to an SDR. In both cases, a user from the buyer organization creates the corrective action.

Creating a Corrective Action from an SDR

A corrective action (CA) is automatically generated when the **Corrective Action Required** field is set to `Yes` and the deviation detail is saved.

Note: The corrective action is automatically created and associated to the SDR. The CA Number becomes a link that you can click to access the document.

Creating a Corrective Action from "Scratch"

When a CA is created without an SDR, there are more details that need to be entered before it can be saved. At a minimum, you must complete the **Organizational Ownership**, **Corrective Action Leader**, **Severity**, **Supplier Name**, **Supplier Number**, and **Contact Name** fields. To create a CA from scratch:

1. Click **Engineering Quality**, then **Create Corrective Action** from the X.PC menu.

2. At a minimum, complete the required fields (described above).

Note: Other required fields, such as **Business Unit**, **Description of Event** and **Expected Closure Date**, will eventually need to be completed before the CA can be placed into the `INITIATED` status.

3. Click **Save**.

Understanding Statuses and Requirements

Much like the SDR, a corrective action must go through an approval process. If the corrective action is required for an SDR, the CA must be closed before the SDR can be closed.
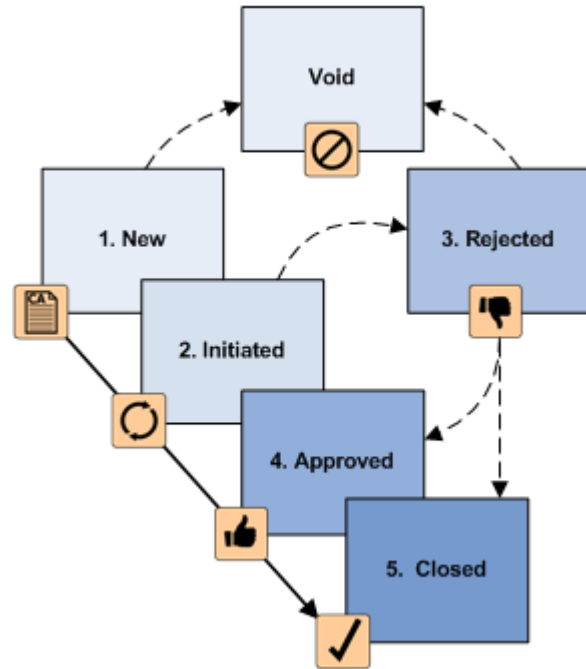
Reviewing Corrective Action Statuses

The corrective action can have one of six different statuses:

Status	Description
NEW	The corrective action has just been created.
INITIATED	Email notifications are sent and the corrective action is turned over to users from the buyer and supplier organizations for their review and input. Prerequisites: • All Required fields are completed, including **Description of Event** and **Expected Closure Date**.
APPROVED	The corrective action *is* sufficient. The supplier is notified via email. Prerequisites: • **Root Cause Analysis** and **Corrective Action Description** fields must be complete. • If the severity is `Major`, the **Manager Signoff** box must be check by an SQL.

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Status	Description
REJECTED	The corrective action *is not* sufficient. The supplier is notified via email and can add additional comments and description. Prerequisites: • **Root Cause Analysis** and **Corrective Action Description** fields must be complete.
CLOSED	The corrective action process is finished. The associated SDR can now be closed. Prerequisites: • All previous requirements.
VOID	The corrective action is no longer required.

Changing the Status of a Corrective Action

In order to change the status of a corrective action, you must ensure that certain criteria are met. To change the status of a CA:

1. Locate, view, and lock the corrective action record you would like to advance in status.

2. Scroll to the bottom of the screen and choose a status from the drop-down list.

Note: Corrective actions with the severity `Major` must be reviewed and approved by an SQL before they can be `APPROVED` or `CLOSED`.

3. Click **Go**. The screen refreshes, the status is changed, and the corrective action is unlocked.