

**California Automated Response and Engagement System (CWS-CARES)  
Resource Family Application (RFA) Project**



**Submission & Approval - Managers & Supervisors**

To be used with **Module 10: Submission & Approval – Managers & Supervisors** Participant Guide

May 2022  
Quick Guide 10a  
Version 7.0

## Revision History

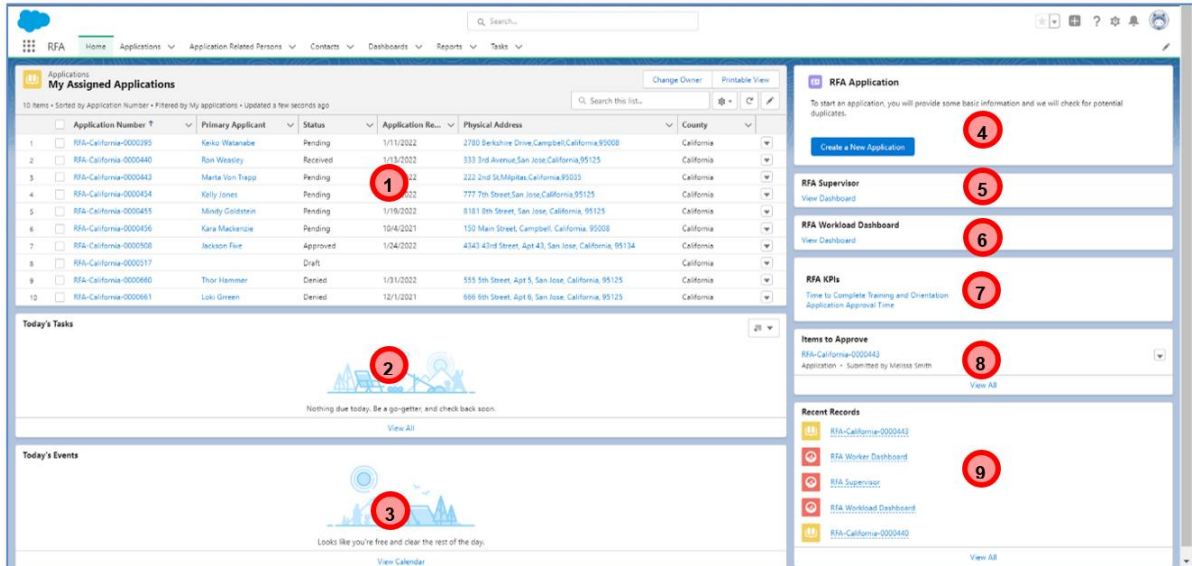
Revision / Version #	Date of Release	Author	Summary of Changes
1.0	01/18/2022	Lori Savageau	Initial draft
2.0	01/21/2022	Lori Savageau	Updated Draft
3.0	01/21/2022	Lori Savageau	ADA Compliance Check
4.0	02/03/2022	Ericka Durant	Updated training steps
5.0	02/11/2022	Melissa Smith	Revised ADA Compliance Check
6.0	02/18/2022	Melissa Smith	Made updates as identified by Ericka: Updated screenshot of dashboard to include RFA KPIs, a note to refer to the QG 10b for more information, and indicating method 2 as the preferred method
7.0	5/20/2022	Ericka Durant	Updated Screenshots
8.0	6/3/2022	Lori Savageau	ADA Review and Revisions

# Submission & Approval - Managers & Supervisors

## Navigation

1. The **Home** page is divided into 9 sections:

- **Section 1** shows any applications that have been assigned to you. (Note: This is **not** applications for approval, but ones that you are assigned as owner)
- **Section 2** shows any tasks you have scheduled
- **Section 3** displays any events that are upcoming. Note there is a link to open your calendar
- **Section 4** contains functionality for you to create and application if needed.
- **Section 5** will display the supervisor/manager's dashboard. We'll see this shortly
- **Section 6** displays the RFA Workload Dashboard. We'll explore this also
- **Section 7** lists links to RFA Key Performance Indicators (KPIs)
  - a. **RFA 01 – Application Approval Time**
  - b. **RFA 08 – Time to Complete Training & Orientation**
- **Section 8** displays any items assigned to you for approval. There is also a link to the item so you can review it
- **Section 9** displays a list of recent records you have reviewed and a link to them.

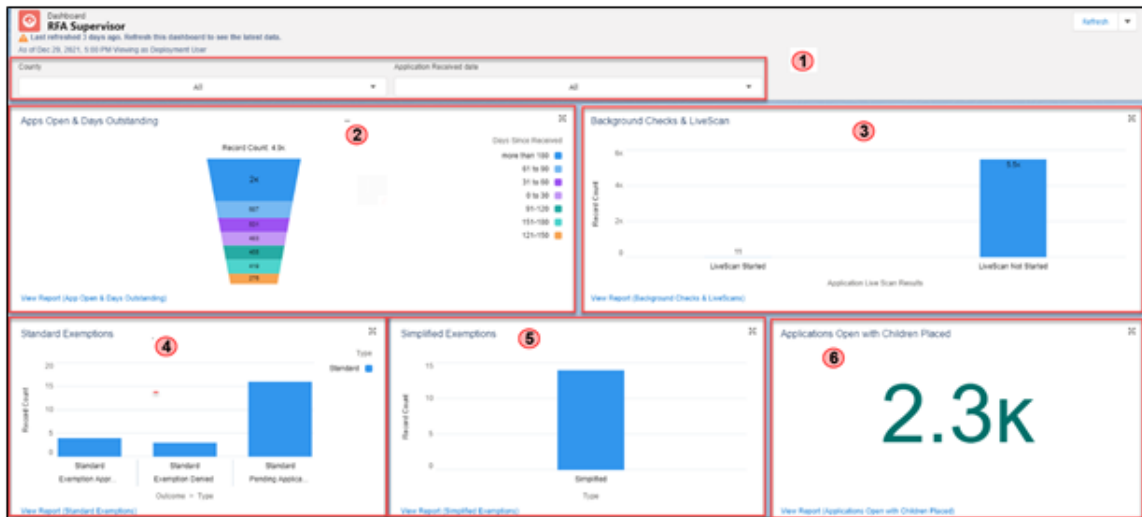


The screenshot shows the RFA Home page dashboard. The main section is 'My Assigned Applications' with a table of 10 items. A red circle '1' highlights the first row. To the right is a sidebar with several sections: 'RFA Application' (with a 'Create a New Application' button and a red circle '4'), 'RFA Supervisor' (with a 'View Dashboard' link and a red circle '5'), 'RFA Workload Dashboard' (with a 'View Dashboard' link and a red circle '6'), 'RFA KPIs' (with a link to 'Time to Complete Training and Orientation' and a red circle '7'), 'Items to Approve' (with a 'View All' link and a red circle '8'), and 'Recent Records' (with a 'View All' link and a red circle '9'). At the bottom left, there are two sections: 'Today's Tasks' (with a 'View All' link and a red circle '2') and 'Today's Events' (with a 'View Calendar' link and a red circle '3').

**NOTE:** For more information on section 7, please see Quick Guide 10b: RFA Key Performance Indicators: Application Approval Time and Time to Complete Training & Orientation.

2. In Section 5, click the **View Dashboard** link. – The **RFA Supervisor Dashboard** displays.
3. The **RFA Supervisor Dashboard** is divided into five sections:

- **Section 1** allows you to filter by County or Application Receive date. The default values are All Counties and All Application Received Dates
- **Section 2** shows Apps Open and Days Outstanding.
- **Section 3** shows Background Checks and LiveScan data
- **Section 4** shows Standard Exemptions
- **Section 5** shows Simplified Exemptions
- **Section 6** shows Applications Open with Children Placed

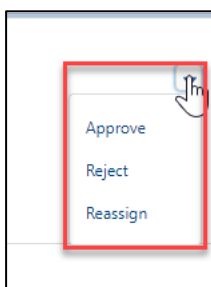


## Written Report and Approval

There are two ways to approve an application.

### Method One (not preferred)

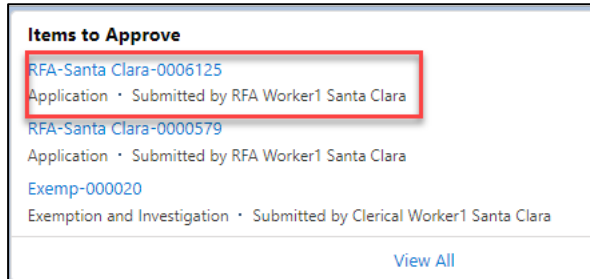
4. From the **Home** page, on the right-hand side of the page, navigate to the **Items to Approve** panel.
5. Click the **dropdown arrow** next to the application needing approval. – The dropdown list displays, with the options to **Approve**, **Reject**, or **Reassign** the application.



**NOTE:** This is a blind approval, if this is used, you cannot see the details of the application.

## Method Two (preferred)

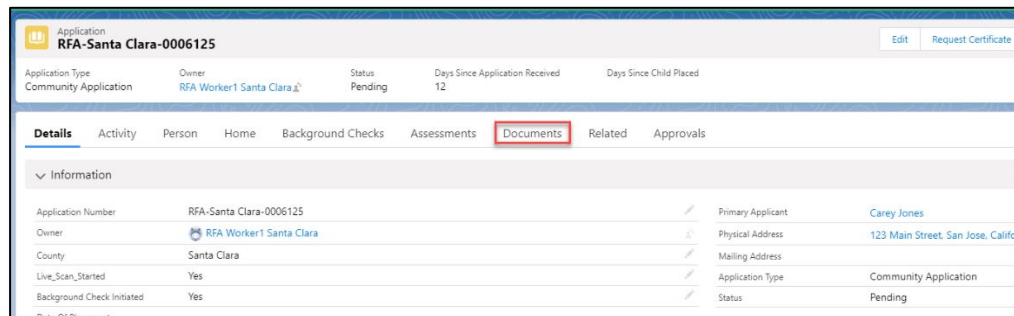
1. From the **Home** page, on the right-hand side of the page, navigate to the **Items to Approve** panel.
2. Click the **link to the approval**. – The **Application/Details** page displays.



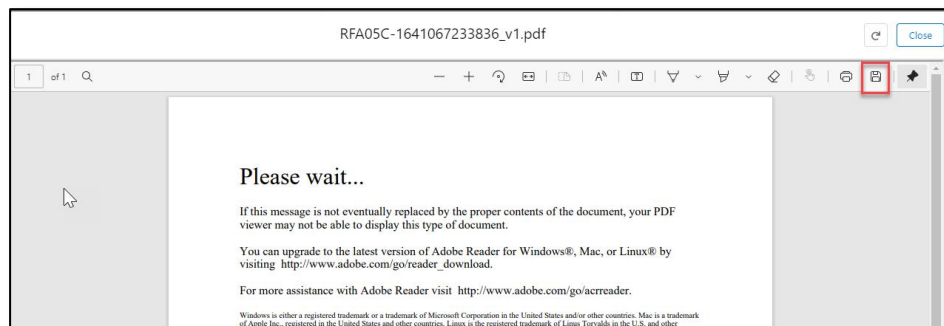
3. On this page, the **Application Approval Request** panel appears. From here, too, you will have the option to **Approve**, **Reject**, or **Reassign** using the buttons in the upper right-hand corner. However, before approval, you will want to review the written report.

## Written Report

4. To view the **Written Report**, click the **Documents** tab. – The **Documents List** displays.

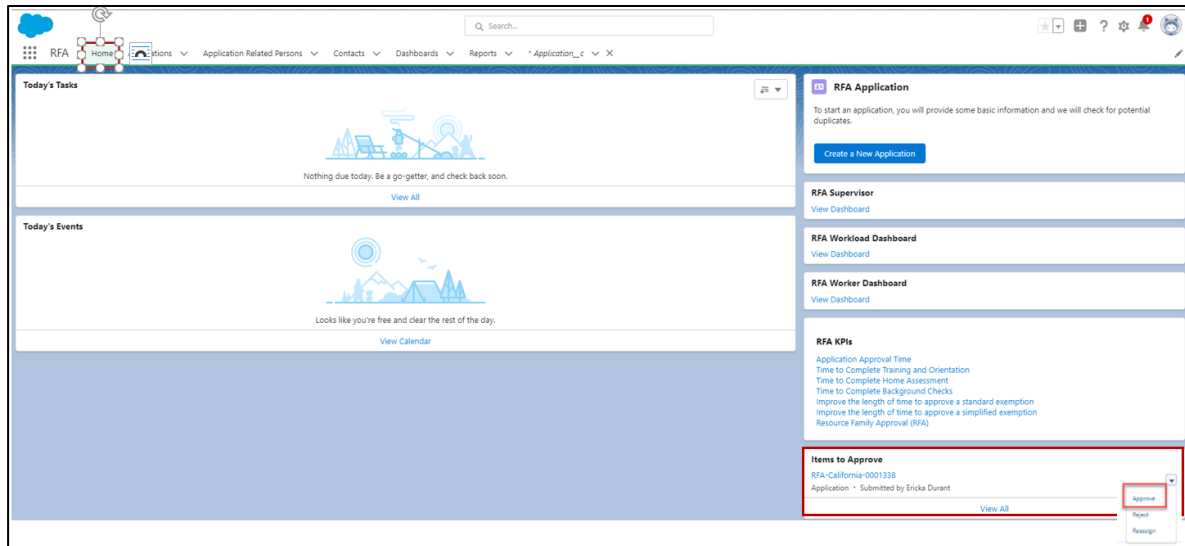


5. Click the **arrow** next to the Written Report and select **Download**. – The **PDF** page displays.
6. Click the **Save icon**.

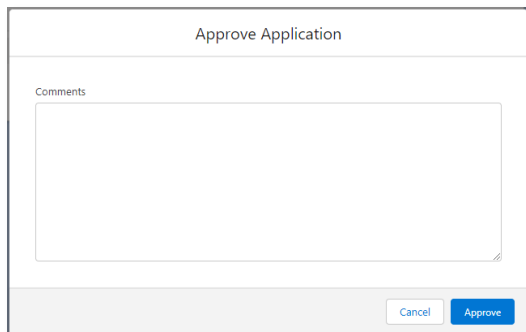


7. Select a **location**.
8. Click **Save**.
9. Navigate to your desktop and **double-click** the file to open. – The **Written Report PDF** page displays.

10. Review this and any other part of the application that requires review. Close the pdf.
11. Click on the **Home** tab. – The **Home page** displays.
12. In the **Items to Approve** section, click the **down arrow** next to the application and select **Approve**. – The **Approve Application** popup window displays.



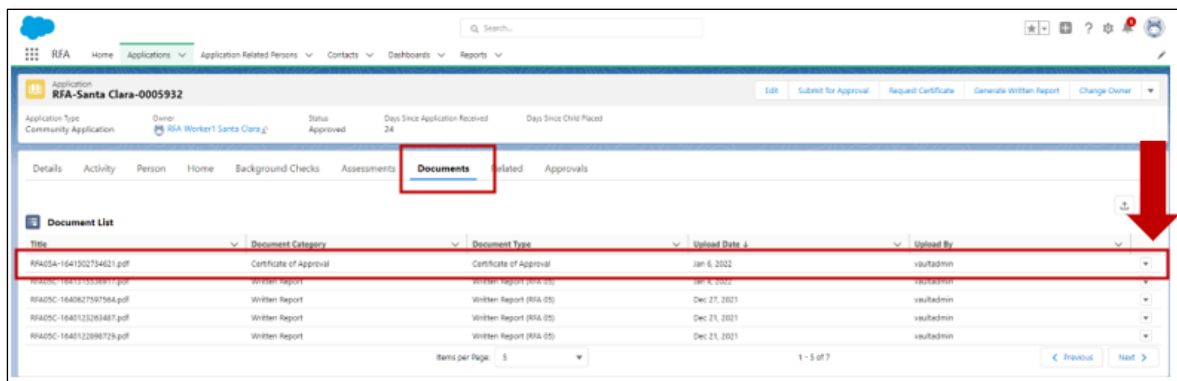
13. Enter a **comment** and click **Approve**. – You are returned to the Home page, and the item is removed from the Items to Approve list.



## Request and Download Certificate of Approval

1. From the **Home** page, navigate to the **Application**.
2. In the upper right-hand corner, click the **Request Certificate** button. – The **Request Certificate** window displays.
3. Complete the **Request Certificate** fields. Click **Next**. – The **Certificate Generation Successful** window displays.
4. Click **Finish**. – You are redirected to the **Application Details** page.
5. Click the **Documents** tab in the **Application** sub menu. – The **Documents List** displays.

- On the **Certificate of Approval** row, click the **down arrow** and select **Download**. – A popup window displays a PDF of the **RFA Approval Certificate**.



- Save and download the **Certificate of Approval** in your preferred location by clicking the **save icon** at the top right-hand corner.
- Click **Close**.