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

Submission & Approval - Clerical

To be used with **Module 9: Submission & Approval – Clerical** Participant Guide

May 2022
Quick Guide 9
Version 6.0

Revision History

Revision / Version #	Date of Release	Author	Summary of Changes
1.0	01/18/2022	Lori Savageau	Initial draft
2.0	01/19/2022	Lori Savageau	Updated Draft
3.0	01/21/2022	Lori Savageau	ADA Compliance Check
4.0	02/14/2022	Melissa Smith	Revised ADA Compliance Check
5.0	5/18/2022	Ericka Durant	Updated screenshots and functionality Updated
6.0	6/3/2022	Lori Savageau	ADA Revisions

![CARES Child Welfare Services logo]

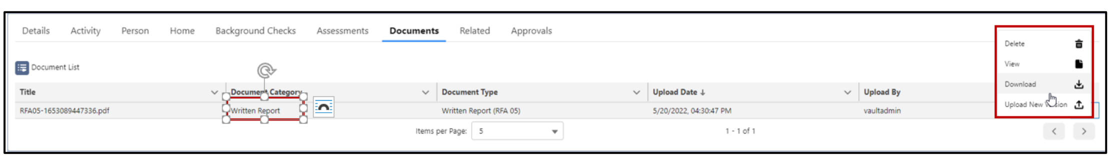
Submission & Approval – Clerical

Updating the Application Status:

1. Begin on the **Details** tab of your application.
2. Click the **pencil** icon next to **Status**. – The page is now editable.
3. Using the dropdown, update the **Application Status** to **Pending.** – The application is now ready for approval.
4. Click **Save**.

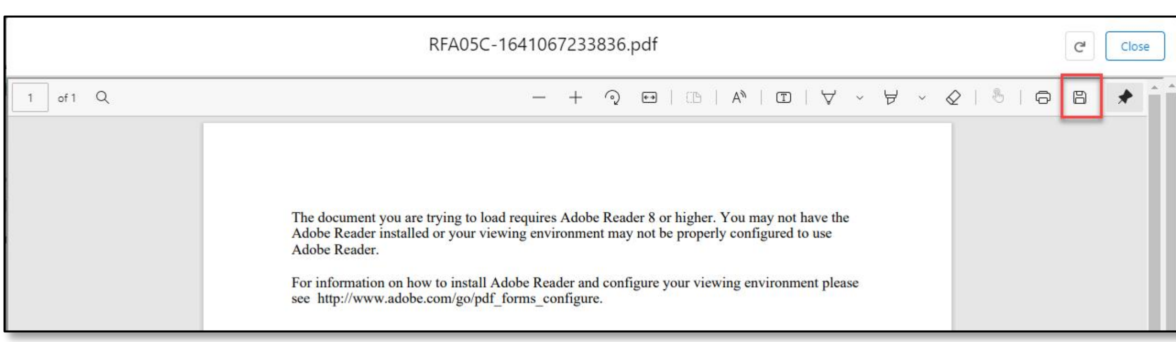
Downloading and Reviewing/Editing the Written Report

1. Begin on the **Details** tab of your application.
2. In the upper right-hand corner, click **Generate Written Report**. – The **Generate Written Report** page displays with a success message.
3. Click **Ok.** – The **Application/Details** page displays, defaulting to the **Details** tab.
4. Click the **Documents** tab. –The Written Report now displays.
5. Click the **down-arrow** to the right of the line item and select **Download**.



Note: If an uploaded documents needs to be deleted, viewed, downloaded, or upload a new version, use the drop down arrow to execute the action

6. A Downloads pop-up page will display. Click the **Open File** link
7. The PDF of the Written Report will display. In the upper right-hand corner, click the **Save icon**. – The **Save As** page displays.



Note:

- The written report cannot be edited in the RFA platform. It must be downloaded and saved to make any changes/updates.
- Navigate to where you want to save the report and click **Save**.
- When saving, you will have to rename the document.
- Consider using your Desktop for the Save location for ease of access.

8. Windows explorer displays. Navigate to where you want to save the document and click **Save.**
9. Open the **Written Report** from your desktop. Complete any sections not completed during the application per your county's business process. **Save.**

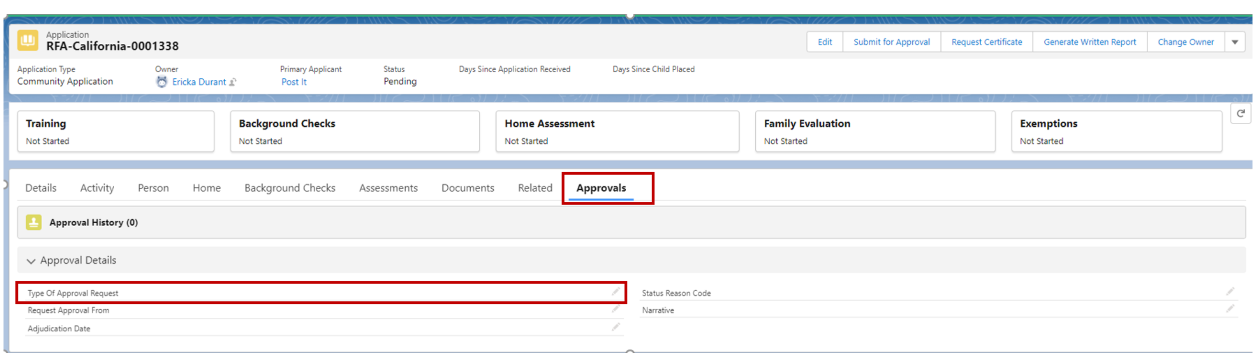
Uploading a Completed Written Report into the Application

1. From the **Details** page of the application, click the **Documents** tab. –The **Documents** page displays.
2. Click the **down arrow** to the right of the existing written report and select **Upload New Version**.
3. Click the **Document Status** drop-down list and select **Final**.
4. Click **Choose File.** Windows Explorer opens.
5. Navigate to your document and select it.
6. Click **Open.**
7. Click **Upload**.

After uploading, the **Upload Date** column will show the **new date and time**.

Submitting for Approval

1. From the **Application page**, select the **Approvals** tab. –The **Approval page** displays.
2. Click the **pencil icon** next to **Type of Approval Request**. – The page is now editable.



Note: An application will not be enabled for submission with an open investigation or an open exemption.

3. Click the **Type of Approval Request** dropdown arrow and select **Approve Application** from the dropdown list.

4. Click in the **Request Approval From** field. Enter the **Approver**.
5. If any comments need to be added to the request, enter them in the **Narrative** field.
6. Click **Save**. – The **Submit for Approval** page displays.
7. Select **Submit for Approval** in the top center of the Application page. – The **Submit for Approval** page displays.
8. Enter any information that the supervisor may need to further process the application.
9. Click **Submit**. – The **Application/Approvals** page displays.
10. The Approval request appears and will now show on the **Pending Approvals** section of the Manager/Supervisor who was selected to Approve.

Application Recall and Withdrawal

Once an application has been submitted for approval, there may be instances where an application needs to be recalled for corrections, dd additional documentation, or re-assign the application for another approver if the primary approver is out of the office or unavailable.

1. From the **Application page**, select the **Approvals** tab. –The **Approval page** displays.
2. Under the **Approval History** submenu, select the **Recall** button.
3. Once the **Recall Approval Request** window opens, enter your recall reasons in the comment box. Once the comments are entered, click **Recall**.
4. Once the application has been successfully recalled, a success message will display.

Note: In the event an application needs to be **Withdrawn**, users can navigate to the **Details** panel of the application page, select the **Pencil** icon, and fill out the form.