



Approval & My Requests – DHS Job Aid

There are several screens and processes in KIDS that require supervisor approval. A request for approval is made by the staff person and is completed by the supervisor after the screen or screens have been reviewed. The approval process can be tracked through the links located under *My Requests* located in the *My Tasks* section of the *Left Pane Navigation* bar.

Requesting Approval

Approval

Requesting Worker	Request Date	Approving/Denying Worker	Approve/Deny Date
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Requesting Worker: Requesting Date:

Approving Worker: Approving Date:

☐ Request ☐ Deny ☐ Approve ☐ Send Back ☐ Additional Approval Reason:

Comments:

OK Cancel

1. Bring the Referral or Case into focus.
2. Navigate to the item or screen that requires approval.
3. Click on the **[Approval]** button to display the Approval pop-up.
4. The name of the logged in user is displayed in the *Requesting Worker* field.
5. The name of the default *Approving Worker* is displayed based up in the item being approved.
 - i. *TIP: A different Approving Worker can be selected from the Approving Worker drop list.*
6. Mark the *Request* checkbox to request approval.
 - i. *TIP: The Approval grid at the top of the pop-up will populate with the name of the Requesting Worker and the Request Date and time.*
7. Click the **[OK]** button.
8. A pop-up message stating "Your approval request has been sent" will be displayed.
9. Click the **[OK]** button to remove the pop-up.
 - i. *TIP: If you do not receive the approval request confirmation message, a step may have been missed.*

Completing an Approval

Department of Human Services
Allegheny County, Pennsylvania

kids
Key Information and Demographics System

Referral Case Client Provider FS/OC Mainframe Admin Help Logout Case

Organizer Focus History

Workload

- My Assignments
- My Workers
- Other Units

My Calendar

December 2013

S	M	T	W	T	F	S
24	25	26	27	28	29	30
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31	1	2	3	4

My Tasks

- My Request
- My Approval Inbox
- Online Service Requests
- My Alerts
- Common Assessment Appr

Approval View

* Denotes Required Fields ** Denotes Half-Mandatory Fields † Denotes AFCARS Fields

Awaiting Action

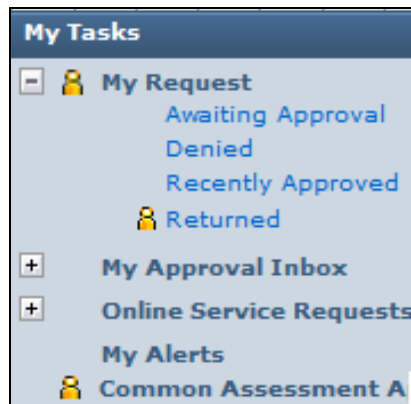
Unit:


Request Date	Requested Approver	Approval	Name	Requestor	Agency Name	ID	Type

Show Cancel

- Click on the *Organizer* tab located in the *Left Pane Navigation* bar.
- In the *My Tasks* section, click on the + sign to expand the *My Approval Inbox* link.
- Click on *Awaiting Action* to display the *Approval View* screen.
 - TIP: The Approval View screen for the Unit of the logged in worker is displayed. Select another name in the Unit field to approve an item on behalf of a different Approving Worker.*
- Select the item to be viewed and approved. Click the **[Show]** button to display the item.
- Review the item.
- Click the **[Approval]** button to display the *Approval* pop-up.
- Mark the *Approve* checkbox to approve the item, or the *Send Back* checkbox to return the item to the *Requesting Worker*, or the *Deny* checkbox to deny the request.
 - TIP: When the Send Back checkbox is marked, the Comments field becomes active and mandatory.*
 - TIP: The Approval grid at the top of the pop-up will populate with the name of the Approving/Deny/Send Back Worker and the Approving/Deny/Send Back Date and time.*
 - TIP: The Additional Approval checkbox is marked when a Concrete Good Request requires additional tiers of approval.*
- Click the **[OK]** button to complete the *Approval/Send Back/Deny* process.
- When approving an item a pop-up message stating "Approval completed successfully" is displayed. Click the **[OK]** button to remove the pop-up.
 - TIP: If you do not receive the approval confirmation message, a step may have been missed.*

My Requests



1. Click on the *Organizer* tab located in the *Left Pane Navigation* bar.
2. In the *My Tasks* section, click on the + sign to expand the *My Request* link.
3. Click on the link for the screen to be viewed.
 - a. Awaiting Approval displays a list of the items that have been submitted for approval.
 - b. Denied displays a list of the requests that have been denied.
 - c. Recently Approved are the times that have been approved in the last 30 days.
 - d. Returned displays a list of the items that the Approving Worker has sent back.
 - i. *TIP: The New Item indicator () is displayed next to My Request and next to the Returned link.*
4. Select the item to be viewed and click the **[Show]** button to view the item.
5. The *Common Assessment Approvals* is a link to the Approving Workers *Approval View* screen in the DHS Assessment Tool application.
 - i. *TIP: Please refer to the Common Assessment Approvals Job Aid for detailed instructions on how to use this link.*

For more information...

For assistance, please contact the Allegheny County Service Desk at servicedesk@alleghenycounty.us or 412-350-4357 (Option 2 for DHS).
To access the Self Service Tool go to <http://servicedesk.alleghenycounty.us>.

This Job Aid and additional user materials are located on the DHS Amazon site at <http://dhswbt.s3.amazonaws.com/KIDSJobAids/index.htm>.