Comply Requests – (Credit Approval Request Form)

How To – To create this item on your portal, follow the directions below.

1) Log into Comply

2) Requests → Templates

3) Search for and locate the Template called *Credit Approval Request Form* → View

4) From the item's detail page, select Actions → Duplicate

5) From the edit compliance item page, customize the item to the unique needs of your school district.

   a. Title – edit as needed

   b. Description – edit as needed

   c. Instructions – edit as needed

   d. Person of Contact – add person(s) of contact

   e. What is required of the user? – leave as is (box checked for Completed Questionnaire)

   f. Request Availability – leave as is (Always Available) or edit to select a Specific dates of availability

   g. Request Assignment – leave as is (item will be available for everyone) or Add/Manage Group Assignment to specify which groups of users can access this item

   h. Approver Request Reminders – leave as is or edit as needed (add additional reminders for approvers)

   i. Approver Email Preference – leave as is (Immediate Notification)

   j. Questionnaire – editing questionnaire will occur in step # 8

   k. Resources – edit as needed / add links and/or documents as needed

   l. Approval Stages – add one or more approval stages as needed. Note – Each approval stage must have one or more approvers. If more than one approver is added to an approval stage, you can allow the user to select the appropriate person to submit their request.

   m. Tags – add tag as needed

   n. Act 48 – ignore / not applicable

6) Request Follow-Up

   a. Require follow-up for every request – leave as required

   b. Follow-Up Requirements – leave as is (Completed Questionnaire) and (Uploaded Evidence/Attachment)

   c. Follow-Up Reminders – leave as is or edit as needed (add additional reminders for approvers or users)

   d. Questionnaires – editing questionnaire will occur in step # 8

   e. Approval Stages – add one or more approval stages as needed. Note – Each approval stage must have one or more approvers. If more than one approver is added to an approval stage, you can allow the user to select the appropriate person to submit their request.

7) Save, Publish, and Close the item

8) From Questionnaire Management → Templates

   a. Locate the Template titled, **Credit Approval Request Form**→ Actions → Edit

   b. From the Edit Questionnaire page, customize the form…

      • Title – edit title as needed and be sure to remove template copy

      • Questions – edit questions and add questions as needed

      • When finished Save → Close

   c. Repeat the above steps to edit the questionnaire for **Credit Approval Request - Reimbursement**

9) Locate and return to your item from Requests → Request Management → My Request Supervision to view this available Request.

Note: This Request item is now accessible to users under "Available Requests" and can be completed at will.