

## Adults Quick Guide


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### Requests and Notifications


The **Requests** icon  is in most workflow steps.


It is used to send requests and/or notifications to an individual worker or team where required.

Workflow steps will have mandatory or optional requests and notifications, or a combination of both.

 **Requests** allow you to ask for a task to be completed. If a request has been sent the workflow step cannot be finished until it has been completed.

 **Notifications** allow you to notify another team or worker of important information relating to a workflow step. If a notification is sent it will not prevent the workflow step from being finished.


Click on the **Requests** icon  to view the list of requests and/or notifications available to send from a workflow step. The list available will vary based on the workflow step.

The **Requests** icon will display differently depending on whether there are mandatory requests or notifications and whether the **Save** icon  has already been clicked or not:




Displays if there are only optional requests and/or notifications



Displays if there are any mandatory requests and/or notifications and the **Save** icon  has not been clicked



Displays if there are any mandatory requests and/or notifications and the **Save** icon  has been clicked. Or once a request has been sent but not yet completed. The Requests icon will remain highlighted in red until the mandatory request or notification has been recorded (sent) and all requests have been completed.

## Sending Requests and Notifications

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From within the workflow step –

- Click on the **Requests** icon 

The **New request** window displays


- Select the request or notification using the radio button
- Add a Note in the text box if required

The option to **Pass to worker** and/or **Pass to team** displays

- Either click on the **Find** button to search for the relevant worker/team as appropriate

Or

- Select the worker/team name from the dropdown menu


The request or notification will be sent when you next click the **Save** icon 

- Click the **OK** button

Additional requests and notifications can be added as necessary by clicking on the **Requests** icon again and selecting 'Send request'.

Sometimes an optional form or letter template will need to be completed within the workflow step before a request or notification is sent to a team or worker.

Always check the **Forms and letters** icon  before sending a request or notification.

The **Close Cross** icon  must be used to close the workflow step in order to allow requests to be completed. Workflow steps can only be finished when all requests that have been sent have been completed.