Managers Authorisation Checklist

This checklist is designed to assist managers when authorising workflow steps. If there is anything you cannot check off on the list you should reject/return the request

Authorising workflow steps (Incoming requests)

Access the workflow step: Click the **request hyperlink** in your **Incoming requests** folder to access the **Workflow Step Summary** screen Click **Resume** in the sidebar menu to open the workflow step	
• Check that there are no sections highlighted in red with warning triangles (red highlight indicates mandatory fields not completed)	☐
• Check the workflow step contents	☐
• Check Ready Reckoner and/or Adult Support Plan Costings optional form, if applicable	☐
• Check next actions are correct – correct type and correctly assigned	☐
• Check that appropriate optional forms are used and match with next actions / requests and notifications	☐
• Click **Requests** icon and check that the list of requests / notifications that have been sent is correct, click on the request for authorisation (red text)	☐
• Click the **Completed** or **Returned** radio button as appropriate, add notes (notes must be added if you are returning the request) and click the **OK** button	☐
• If **Completing** the request (authorising) – Click the **Finish** icon	☐
• If **Returning** the request (not authorising) – Click the **Save** icon and close the form using the **Close** icon	☐