





## 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:	
<ul style="list-style-type: none"> <li>• Check that there are no sections highlighted in red with warning triangles (red highlight indicates mandatory fields not completed)</li> </ul>	<input type="checkbox"/>
<ul style="list-style-type: none"> <li>• Check the workflow step contents</li> </ul>	<input type="checkbox"/>
<ul style="list-style-type: none"> <li>• Check Ready Reckoner and/or Adult My Care Package – Planned Services optional form, if applicable</li> </ul>	<input type="checkbox"/>
<ul style="list-style-type: none"> <li>• Check next actions are correct – correct type and correctly assigned</li> </ul>	<input type="checkbox"/>
<ul style="list-style-type: none"> <li>• Check that appropriate optional forms are used and match with next actions / requests and notifications</li> </ul>	<input type="checkbox"/>
<ul style="list-style-type: none"> <li>• Click <b>Requests</b> icon  and check that the list of requests / notifications that have been sent is correct, click on the request for authorisation (red text)</li> </ul>	<input type="checkbox"/>
<ul style="list-style-type: none"> <li>• Click the <b>Completed</b> or <b>Returned</b> radio button as appropriate, add notes (notes must be added if you are returning the request) and click the <b>OK</b> button</li> </ul>	<input type="checkbox"/>
<ul style="list-style-type: none"> <li>• If <b>Completing</b> the request (authorising) – Click the <b>Finish</b> icon </li> </ul>	<input type="checkbox"/>
<ul style="list-style-type: none"> <li>• If <b>Returning</b> the request (not authorising) – Click the <b>Save</b> icon  and close the form using the <b>Close</b> icon </li> </ul>	<input type="checkbox"/>