SAMIS Fiscal Approval Workflow Chain Guide

Workflow Definition
Trust Central - SAMIS Fiscal module uses workflows to establish the proper approval process of a fiscal document. Within the SAMIS module process there are the following fiscal documents: Budgets, Budget Amendments, and Reimbursements. By definition, workflow is a business process in which a fiscal document is moved from one user to another. The workflow approval process begins with the creation, then review and submission of a fiscal document by the agency to the Children Services Council (CSC) known as The Children’s Trust, and it is completed with the review, and approval of the same document by the CSC.

Important: Before the process is operational, the agency and CSC workflow process must be set up for each fiscal document.

Workflow Roles
Workflow roles in SAMIS are assigned and customized by each agency. There are three program-level roles in the agency workflow (Creator, Reviewer, and Submitter) and two in The CSC workflow (Reviewer and Approver). The following diagram shows the permissions and actions that each role can perform.

<table>
<thead>
<tr>
<th>Required Position Action</th>
<th>Agency Role</th>
<th>CSC Role</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Creator</td>
<td>Reviewer</td>
</tr>
<tr>
<td>Create</td>
<td>Yes</td>
<td></td>
</tr>
<tr>
<td>Edit</td>
<td>Yes</td>
<td>Yes**</td>
</tr>
<tr>
<td>Delete</td>
<td>Yes</td>
<td></td>
</tr>
<tr>
<td>Forward</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Submit</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Approve</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
| Reject                   | Yes         | Yes      | Yes      | Yes
**if the fiscal document is rejected by the CSC Approver to the CSC Reviewer, the CSC Reviewer would then able to edit the fiscal document.

**Note:** For each fiscal document, each agency must have at least a "Creator," and a "Submitter" for each fiscal document. However, if desired, you may add as many reviewers as possible.

**How to set up Workflow Approval Chain Setup**

1. Log in to Trust Central and click on **SAMIS**.

2. Click on Fiscal, select the Workflow option, and then **Approval Chain Setup**.

3. Select the Program you would like to create the workflow

4. Assign workflow role

When creating the workflow for the first time, make sure to set the workflow for the following fiscal documents: Budget, Amendment, and Reimbursements.
a. **Creator:** enter the name and then select the user who would serve as creator from the dropdown.

b. **Reviewer:** If applicable, click on the Add User ( ) to add as many Reviewers as needed. Enter the name(s) and then select the user(s) who would serve as creator from the dropdown.

c. **Submitter:** Enter the name(s) and then select the user(s) who would serve as creator from the dropdown.

**Note:** For the “creator” and “submitter” role, only one user is allowed

5. Select Save ( ) located at the bottom of the page to save your changes

**Note 1:** If you would like to modify the workflow instead, and add a new user, delete the existing user listed in the User Name Box by clicking the (X) located at the end of the box. If a fiscal document is associated to the user that is being replaced, the system will move the document to the new user.

**Note 2:** The Workflow Approval Chain Setup can also be accessed by following the steps below:

1. Log in to Trust Central and click on **SAMIS**.
2. Click on **Programs** located in the dashboard menu.
3. Select the **Program Name**
4. Click on the “Detail” dropdown list and select “Approval Chain Setup.”
5. Repeat steps 4 and 5 listed above.

How to setup a surrogate in the Workflow Approval Chain Setup

The **Toggle Surrogate** allows the agency to **temporarily** assign an alternate user to a workflow role. Surrogate should **only** be used for a short-term period, and needs to be setup for each applicable Fiscal Area.

1. In the **Approval Chain Setup screen**, select the fiscal document you wish to assign a surrogate.
2. Click on **Toggle Surrogate** option.
3. In the boxes provided, type the name of the user in the Surrogate User Name.
4. Click on the From and To boxes which displays a calendar for you to select the temporary dates.
5. Use the scroll bar to select the exact time in Hour and Minutes.
   
   **Note:** Step #5 must be repeated for the From and To function.

6. Click Done.
7. Click Save located at the bottom of the page.