



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.

Required Position Action	Agency Role			CSC Role	
	Creator	Reviewer (optional)	Submitter	Reviewer	Approver
Create	Yes				Yes
Edit	Yes			Yes**	
Delete	Yes				
Forward	Yes	Yes		Yes	
Submit			Yes		
Approve					Yes
Reject		Yes	Yes	Yes	Yes

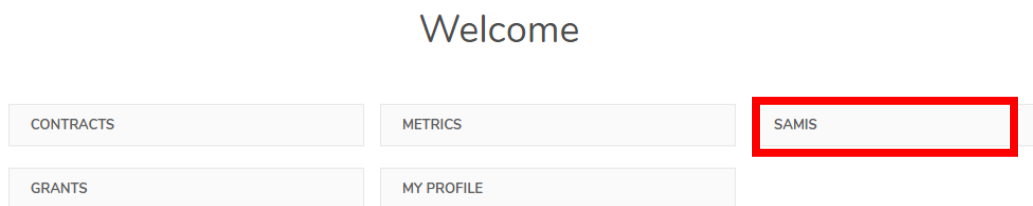


**if the fiscal document is rejected by the CSC Approver to the CSC Reviewer, the CSC Reviewer would then be able to edit the fiscal document.

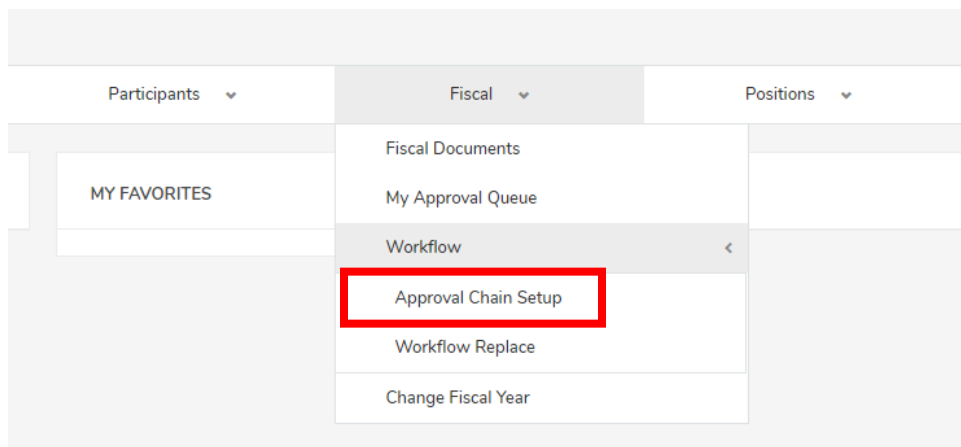
Note: For each fiscal document, each agency must have at least a "Creator," and a "Submitter" for each fiscal document. However, if desired, you may add as many reviewers as possible.

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

	Program ID	Program Name ↑	Agency Name	Active
1	594	PAR XX99-9999 My Sunny Agency of Miami-Dade	My Sunny Agency of M...	Yes

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

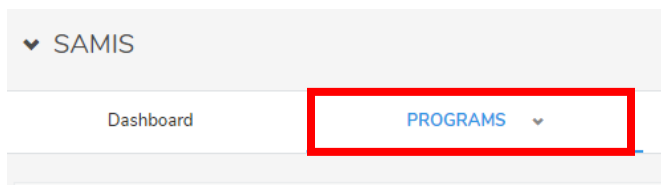
5. Select **Save** () located at the bottom of the page to save your changes

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.

Agency	
Role	Approval User
Creator	Diana BeltreA (dianaba) <input type="button" value="x"/> Edit Email Toggle Surrogate
Submitter	Diana BeltreA (dianaba) <input type="button" value="x"/> Edit Email Toggle Surrogate

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

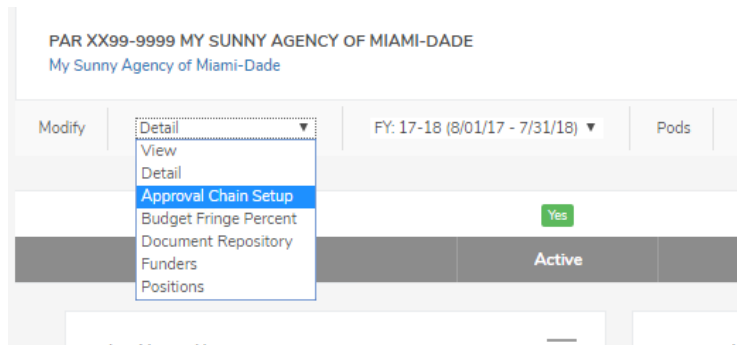
1. Log in to Trust Central and click on **SAMIS**.
2. Click on **Programs** located in the dashboard menu.



3. Select the Program Name

	Program ID	Program Name ↑	Agency Name	Active
1	594	PAR XX99-9999 My Sunny Agency of Miami-Dade	My Sunny Agency of M...	<input type="button" value="Yes"/>

4. Click on the “Detail” dropdown list and select “Approval Chain Setup.”

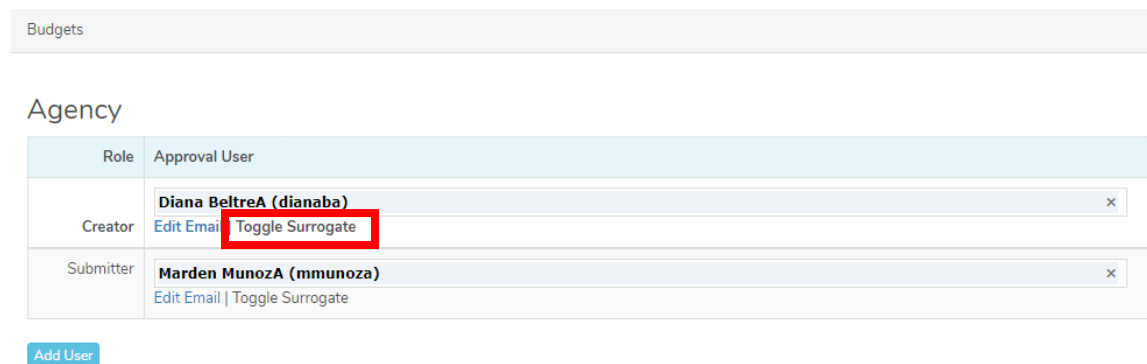


5. Repeat **steps 4 and 5** listed above.

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

Budgets

Agency

Role	Approval User																																										
	Diana BeltreA (dianaba) Edit Email Toggle Surrogate																																										
	User Name																																										
	04/30/2018 11:17 am																																										
Creator	April 2018																																										
Submitter	<table border="1"><thead><tr><th>Su</th><th>Mo</th><th>Tu</th><th>We</th><th>Th</th><th>Fr</th><th>Sa</th></tr></thead><tbody><tr><td>1</td><td>2</td><td>3</td><td>4</td><td>5</td><td>6</td><td>7</td></tr><tr><td>8</td><td>9</td><td>10</td><td>11</td><td>12</td><td>13</td><td>14</td></tr><tr><td>15</td><td>16</td><td>17</td><td>18</td><td>19</td><td>20</td><td>21</td></tr><tr><td>22</td><td>23</td><td>24</td><td>25</td><td>26</td><td>27</td><td>28</td></tr><tr><td>29</td><td>30</td><td>1</td><td>2</td><td>3</td><td>4</td><td>5</td></tr></tbody></table>	Su	Mo	Tu	We	Th	Fr	Sa	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	1	2	3	4	5
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29	30	1	2	3	4	5																																					

Time 11:17 am

Hour

Minute