Trust Central Fiscal Approval Workflow Guide

Workflow Definition

Trust Central - Fiscal module uses workflows to establish the proper approval process of a fiscal document. Within the FISCAL module process there are the following fiscal documents: Budgets, Budget Amendments, and Reimbursements. By definition, a 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 FISCAL 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.

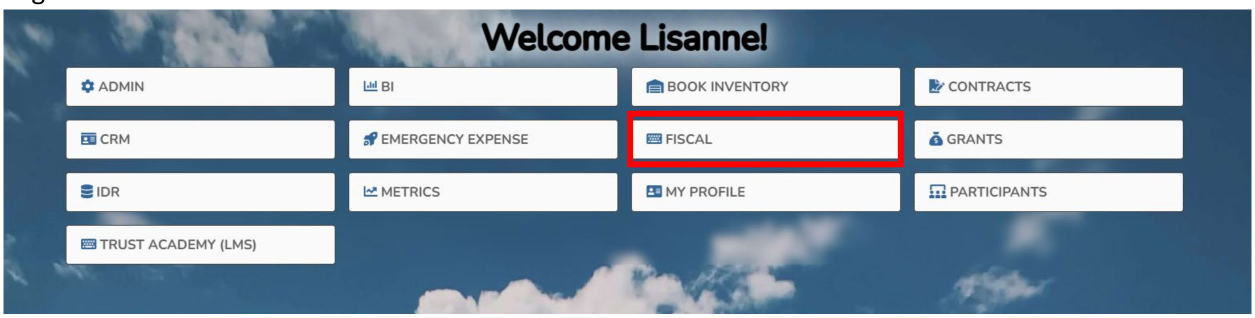
	Agency Role			**CSC Role**	
Required Position Action	**Creator**	**Reviewer (optional)**	**Submitter**	**Reviewer**	**Approver**
Create	Yes				Yes
Edit	Yes			Yes**	
Delete	Yes				
Forward	Yes	Yes		Yes	
Submit			Yes		
Approve					Yes
Reject		Yes	Yes	Yes	Yes

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

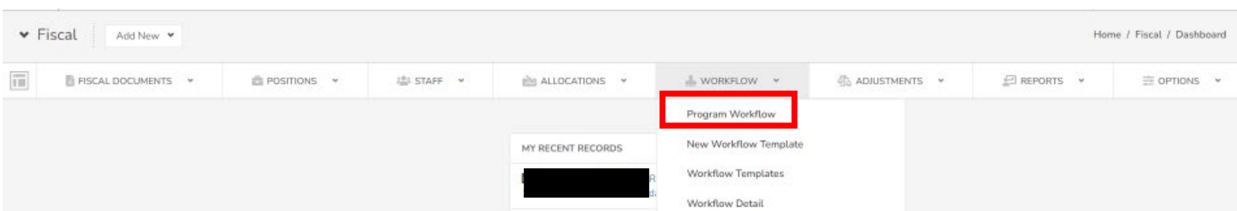
Note: For each fiscal document, each agency must have at least a "Creator," and a "Submitter" for each fiscal document. However, if desired, you may add as many reviewers as possible.

How to set up Workflow Approval Chain

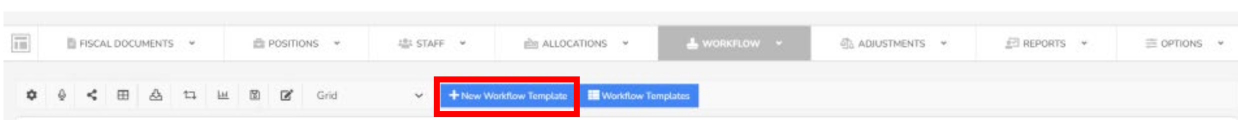
1. Log in to Trust Central and click on FISCAL.



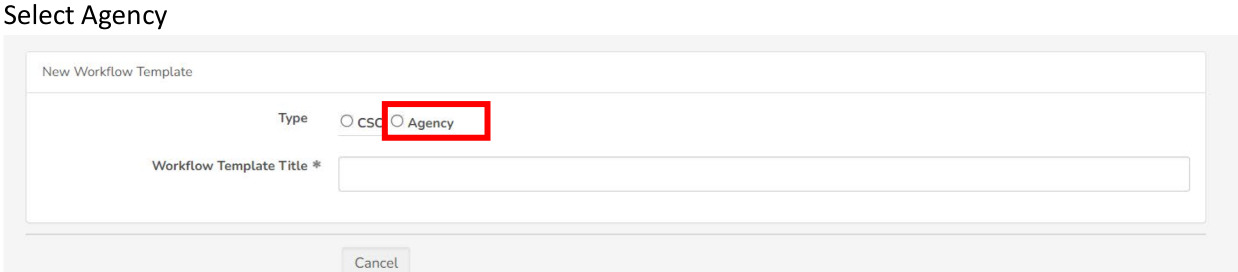
2. Click on Workflow, select the Program Workflow.



3. Select the “New Workflow Template”



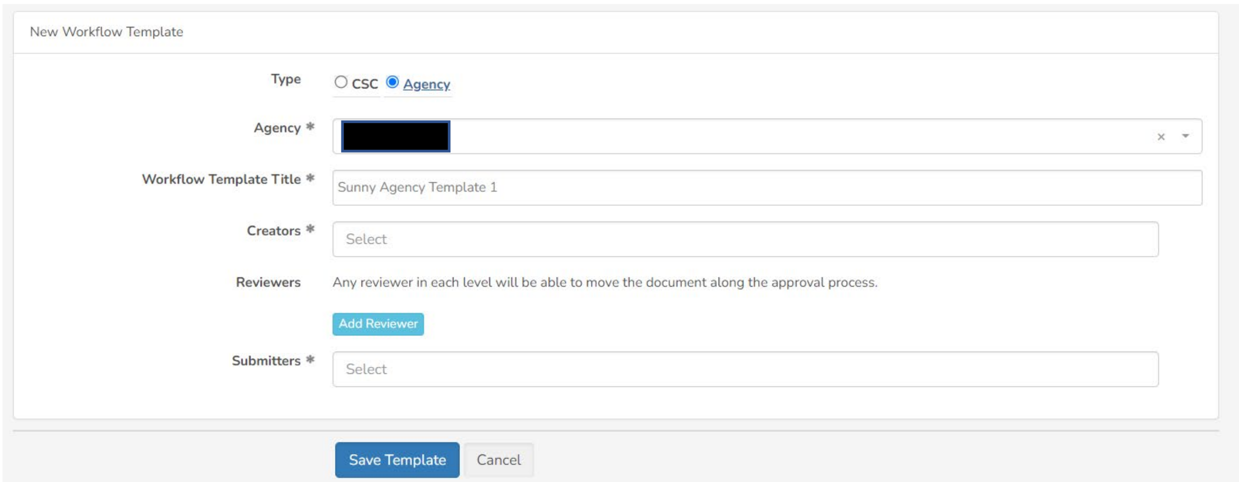
4. Select Agency



5. Once you select Agency, the following fields will populate. Assign workflow role.
Creator: Select the user who would serve as creator from the dropdown.

Reviewer: If applicable, click on the Add Reviewer to add as many Reviewers as needed. Select the user(s) who would serve as reviewer from the dropdown.
Submitter: Select the user(s) who would serve as submitter from the dropdown.

Select Save Template located at the bottom of the page to save your changes



6. Now that the template has been created, you will need to assign template to respective program.