

Supervisor Authorization - Overview

Supervisor Authorization is the process of the 1st level approver or 2nd level approver reviewing cases for accuracy after an EDBC or fiscal transaction has been generated by a worker. After authorization, CalSAWS completes the action and sends the appropriate NOAs.

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Supervisor Authorization Terminology



Worker:

Worker completing the action that requires authorization.



1st Level Approver:

Supervisor of the worker who completed the action that requires authorization.



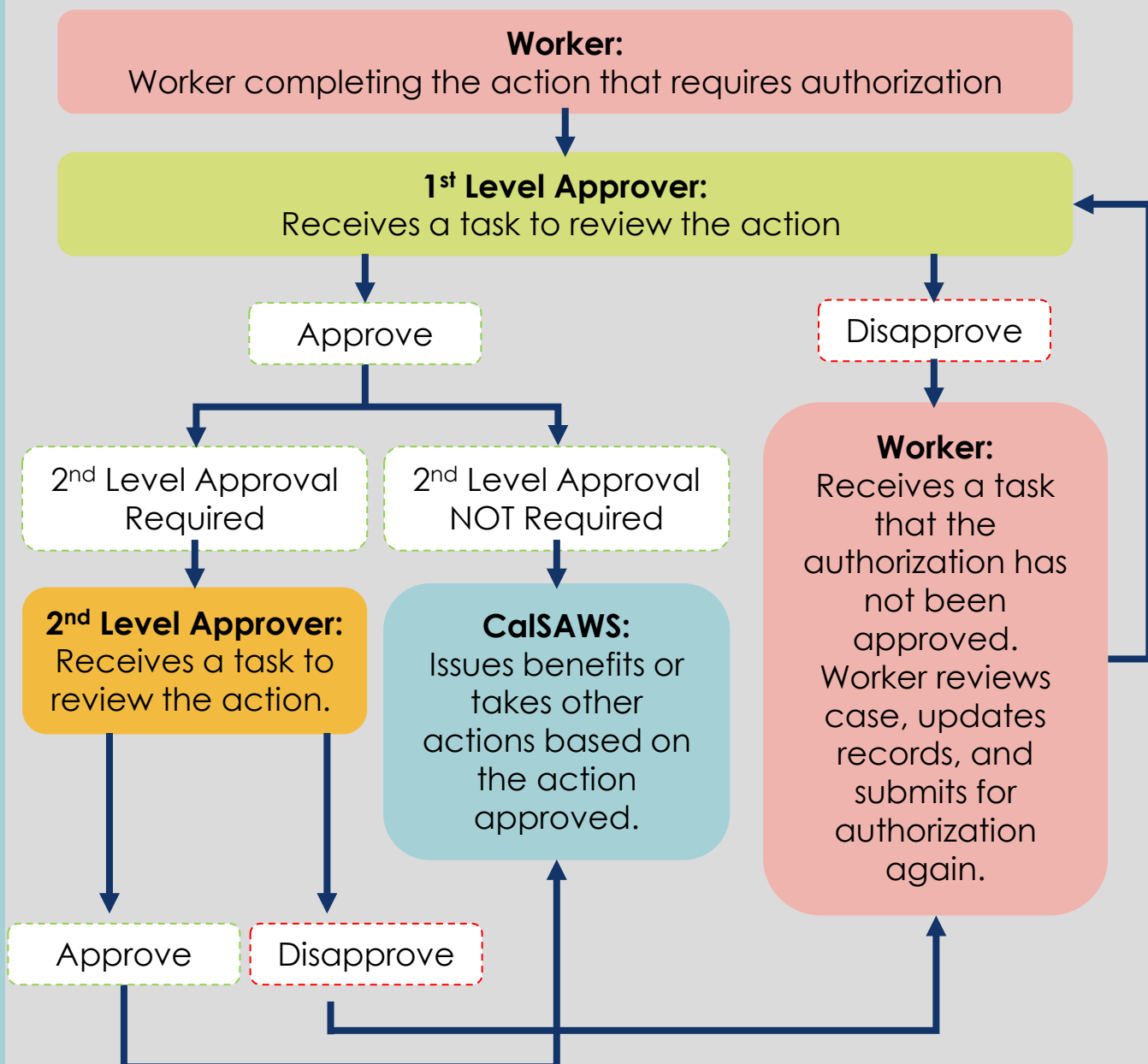
2nd Level Approver:

Supervisor of the 1st level approver.

2

Supervisor Authorization Process

The following process flow describes the worker and approver authorization actions.



Supervisor Authorization – Administrative User

The County's entries on the Authorization pages set the authorization levels for the corresponding action whenever any worker takes that action.

County Authorization Page

EDBC Section

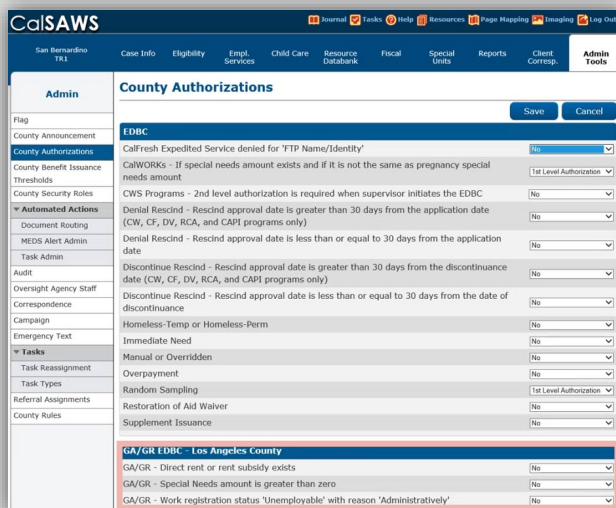
The EDBC section of the County Authorization page is updated by the County's designated user according to the County's business

processes and program needs.

Each drop list includes the following selection options*

- No
- 1st Level Authorization
- 2nd Level Authorization

Drop lists default to No.



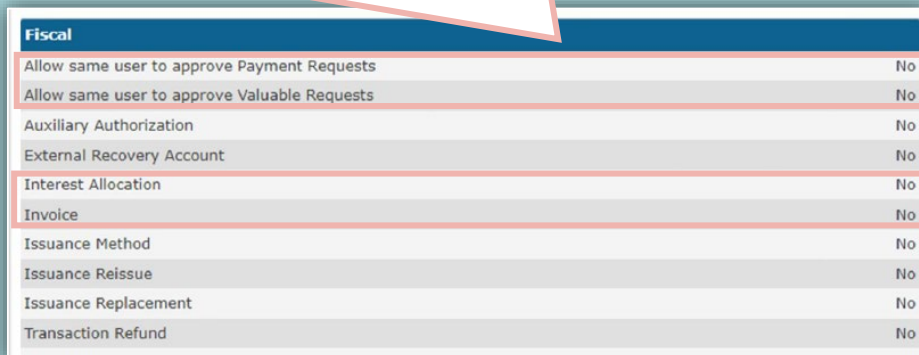
The GA/GR EDBC – Los Angeles County section is only for Los Angeles County and does not impact your CalWIN County

*Exception: "CWS Program – 2nd level authorization is required" drop list options are Yes and No

Fiscal Section

The drop list options default to 1st level authorization. The County's designated user can edit the entries to No or 2nd level authorization*.

Allow the County to indicate if the same worker that creates the payment request or valuable request can also approve it



Interest Allocation and Invoice are only for Los Angeles County and do not impact your CalWIN County

*Exception: "External Recovery Account" and "Issuance Method" drop list options are No and 1st Level Authorization

Fiscal – Payment/Valuable Request Section

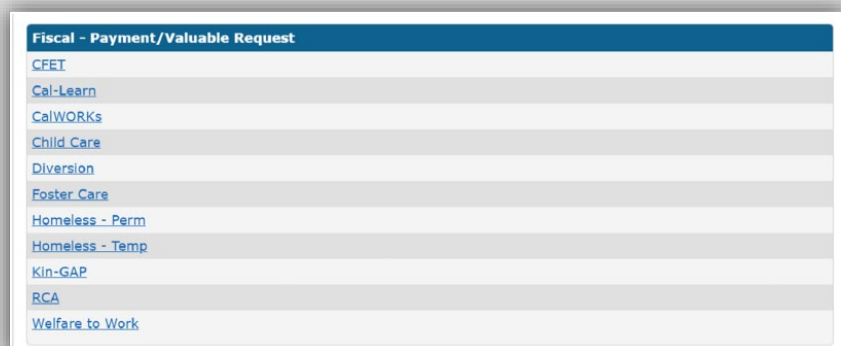
This section displays all programs for which service arrangements are available for the worker's County.

In View mode, each program displays as a hyperlink that, when clicked, accesses the Payment/Valuable Request Authorization List page for that program.

The Authorization drop list options for each program are:

The Authorization drop list options for each program are:

- No
- 1st Level Authorization
- 2nd Level Authorization



Supervisor Authorization - Worker

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Three Types of Authorizations

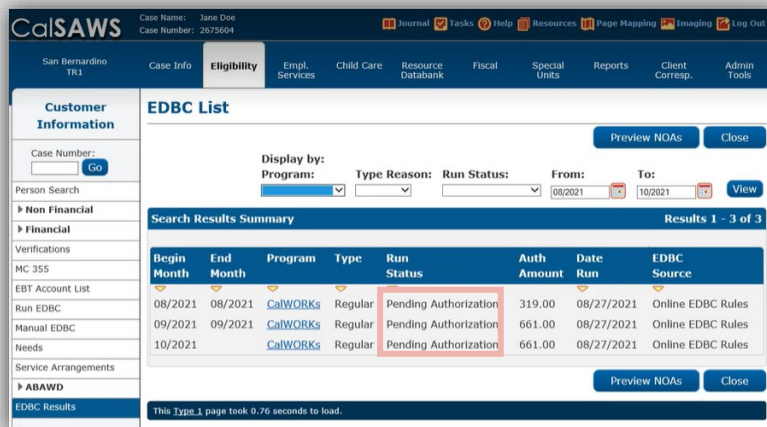
EDBC Authorizations

When a worker's County determines authorization is required for EDBC a task is generated for the approver(s) after the worker runs, accepts and saves EDBC results. When saved, the EDBC status is Pending Authorization. If the authorization request is approved,

CalSAWS issues benefits and sends the appropriate NOAs.

If the authorization request is not approved, the worker receives a ReRun EDBC task, updates the case as necessary and reruns EDBC.

1

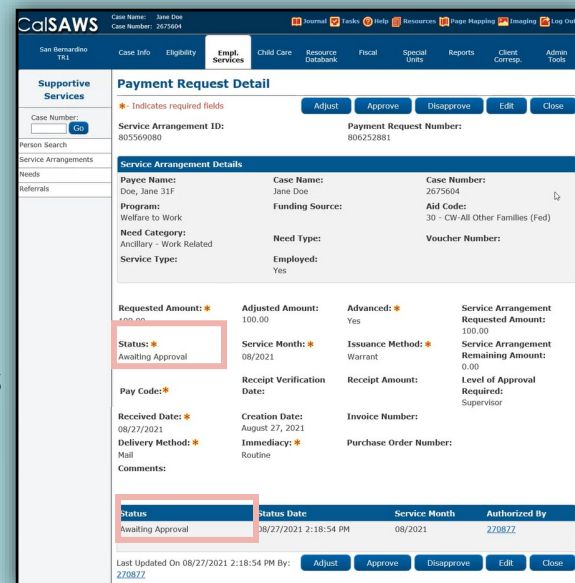


Payment Request Authorizations

When a worker's County determines authorization is required for a payment request, a task is generated for the approver(s) after the payment request is created and saved. When saved, the payment request status is updated to Awaiting Approval.

If the payment request is approved, CalSAWS issues the payment and sends the appropriate NOAs.

If the payment request is disapproved, the worker receives the Payment Request Disapproved task



2

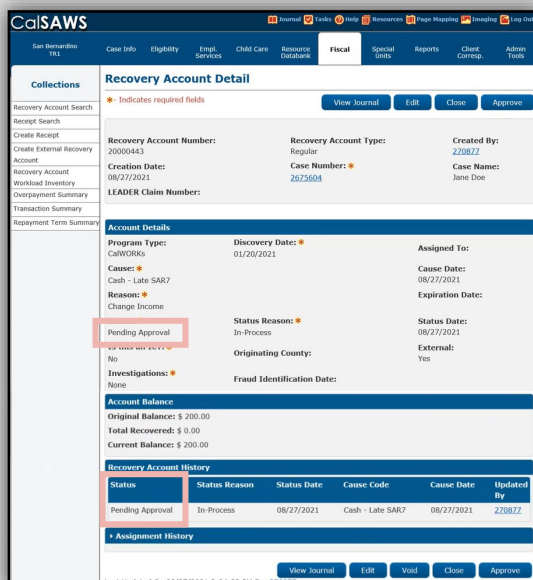
Fiscal Authorizations

Your County may determine authorization is required for the following fiscal actions:

- Auxiliary authorization
- External recovery account
- Issuance method
- Issuance reissue
- Issuance replacement
- Transaction refund

After completing the action, the status updates to Awaiting Approval or Pending Approval and CalSAWS generates a task for the approver(s).

3



Supervisor Authorization – Approver

Supervisor Authorization is the process of the 1st level approver or 2nd level approver reviewing cases for accuracy after an EDBC or fiscal transaction has been generated by a worker. After authorization, CalSAWS completes the action and sends the appropriate NOAs.

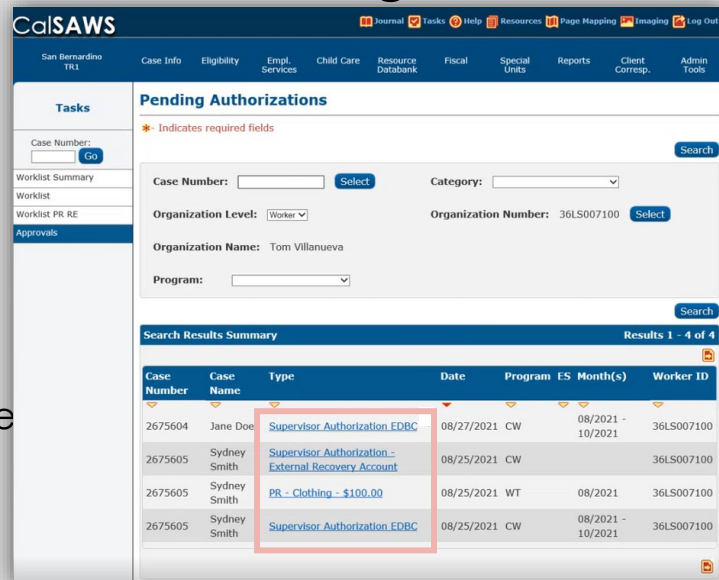
Approving or Rejecting Authorization Requests

Pending Authorizations Page

CalSAWS generates a task for the approver(s) to review and either approve or disapprove the authorization request*.

The Pending Authorizations page displays the worker's authorization tasks.

Clicking the task hyperlink takes the approver to the appropriate page to review and either approve or disapprove the authorization request.



*Note: Anyone with 1st level authorization rights can approve or reject, but only the 1st level authorizer in the unit will receive the task

Approval/Rejection Button

After reviewing the appropriate pages, the approver can approve or reject using the following buttons:

1. For EDBC Authorizations:

- Authorize
- Reject

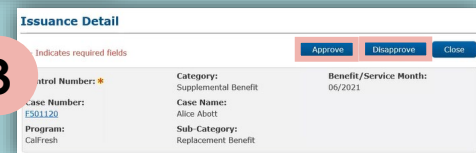
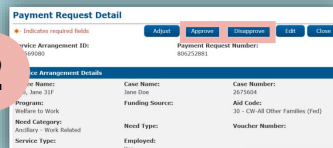
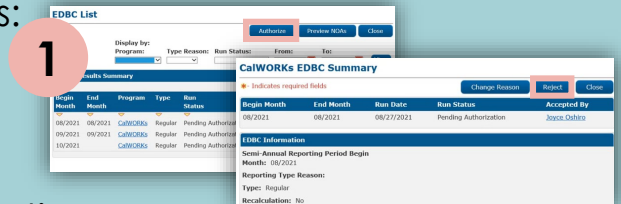
2. For Payment Request Authorizations:

- Approve
- Disapprove

3. For Fiscal Authorizations*

- Approve
- Disapprove

*Note: Recovery Accounts only have the option to Approve. Follow your county's process for disapproval of recovery accounts



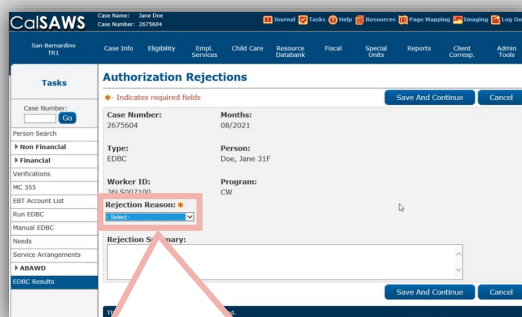
Authorization Rejections

EDBC Authorizations:

The Authorization Rejections page displays when an approver rejects EDBC results. The approver must manually enter a Rejection Reason. Once saved, the worker receives a task to rerun EDBC.

Payment Request and Fiscal Authorizations:

After an authorization request has been disapproved by the approver, the worker receives a task.



Rejection Reason drop list options are:

- Incorrect Case Information
- Incorrect EDBC Determination
- Missing Documents
- Missing Journals
- Other