How To:

Create an Activity Due for Supervisor to Complete “Ready for Review” on drafted Authorization.

When a supervisor is needed to **review** a drafted authorization to determine whether it is ready to be **issued**, the counselor can create an **Activity Due** that will direct the supervisor directly to the drafted authorization that needs their clearance.

To complete the process of creating an **Activity** **Due** for a supervisor, alerting them to review a drafted authorization, you will take the following path:

1. Counselor Selects Ready for Review

2. Counselor Creates Activity Due for Supervisor

3. Supervisor Checks Activity Due’s & Selects Ready for Issue

4. Supervisor Creates Activity Due for Counselor

5. Counselor Checks Activity Due’s & Issues Authorization

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| --- | --- |
| Activity Name | Notes |
| **Objective 1: Counselor Selects Ready for Review** | |
| **NOTE: In this example the Authorization has already been dratted and services have been selected.** | |
| **1.01 Check box for “Ready for Review”** | * On the **Authorization** data page, in **Section 1: General**, check the box for “**Ready for Review**”.      * **Note**: For this example, we are starting with an authorization that has already been drafted. This box **should** **not** be checked off unless the authorization has been drafted and services have been selected. To check to see if an authorization has services selected, scroll to **Section 3: Items\***, and make sure there is at least one item listed in the record table. |
| **Objective 2: Counselor Creates Activity Due for Supervisor** | |
| **2.01 Select Activity Due** | * From the **Main Menu** on the **Authorization** data page, select **New 🡪 Activity Due.**      * An alert will pop up asking if you want the activity due to be related to the **Authorization** **Data** page. This will make it easier for the supervisor to complete the activity due. Select **OK**. |
| **2.02 Complete General Information Fields** | * The **Custom Activity Due** data page will appear. In **Section 1: General**, enter text into the **Activity\*** field.      * Enter in a date in the **Due** **Date**\* field.      * Use the dropdown arrow in the **Priority** field to select either **High** or **Low**.      * NOTE: You can also leave an additional message in the **Comments** field. |
| **2.03 Assign Activity Due** | * In **Section 2: Assign To,** on the **Custom Activity Due** data page, select the **New** button.      * The **Activity Due Staff Assignment** mini window appears.      * You can type the name of the staff member you wish to assign the activity due to in the **Staff** **Member\*** field. Aware will auto generate selections based on your entry.      * You can also search for the staff member by selecting the **Find** button      * This will launch the **Staff Mini-Search** window where you can search by name or unit to select the appropriate staff member. Once your search filters are set, use the **Find** button to see the results of your search.      * Once you select the link of the staff member from **Section 2:** **Results of Search**, their name will auto populate the **Staff Member\*** field back on the **Activity Due Staff Assignment** data page.      * Enter today’s date into the **Start** **Date**\* field and select **Finish** from the **Main Menu**. |
| **2.04 Complete Activity Due** | * The **Custom Activity Due** data page should display. Make sure that the staff member you assigned the **Activity Due** to’s name is showing in **Section 2: Assigned To.** Then select the **Finish** button from the **Main Menu**.      * The **Authorization** data page will display. * Select **Finish**.      * The **Case Management** page for that participant will appear. Select **Finish.** |
| **Objective 3: Supervisor Checks Activity Due’s & Selects Ready for Issue** | |
| **NOTE: Objective 3 outlines the steps the *Supervisor* would take to complete the Activity Due** | |
| **3.01 Select Participant Module** | * As a supervisor, once logged into **Aware** and on the landing page, select the **Participant Module**.      * From the **Case Search** page, under the layout tab, choose the **Activity Due – Staff** layout and select **Apply**. |
| **3.02 Filter Search Results** | * From the **Case Search** page, select the **Search** tab. * With the search tab selected, make sure that the **Activity Status** field has its drop-down set to **“(All)”. \***This is a very important step\*      * Now make sure that the **Related Datapage** field has its drop-down set to **“Authorization”.**      * Select **Find.** |
| **3.03 Select Related Datapage** | * The **Search Results** should display.      * There are several different columns which have links you can select.   + The **Activity Due** column provides you information about what the activity is requiring, **“Authorization Needs Review”** for example.   + The **Activity Status** column provides information on the status of the activity due, e.g., **Completed, Due, Past due**.   + The **Related Datapage** column will bring you directly to the data page that the activity due is asking you to complete. * Select the **Authorization** link in the **Related Datapage** column, that does NOT have an activity status of completed.      * This will take you to the **Authorization** page related to this activity due. |
| **3.04 Select Ready for Issue** | * From the **Authorization** page, the supervisor should see the **“Ready for Review”** box already checked off and the **“Ready for Issue”** box unchecked.      * The supervisor then looks over the authorization and checks the services selected in **Section 3: Items.**      * Once the authorization has been checked, the supervisor can check off the box for, “Ready for Issue”.      * At this point the **Supervisor** has a few options, depending on how their district office will handle the issuing of authorizations. They could either (1) **Issue** the authorization themselves or (2) create an **Activity Due** for the counselor to complete the issuance.   1. The supervisor could go ahead and **Issue this Authorization** right from this point. To do so they would select **Actions 🡪 Issue Authorization.**      * 1. The supervisor could also create an Activity Due for the counselor, alerting him/her to complete the process of issuing the authorization. **See objective 4 below**. |
| **Objective 4: Supervisor Creates Activity Due for Counselor** | |
| **NOTE: Objective 4 outlines the steps the *Supervisor* would take to create an activity due reminder for a counselor to complete the process of issuing an authorization.** | |
| **4.01 Create Activity Due** | * From the **Authorization** page, select **New 🡪 Activity Due**      * An alert will pop up asking if you want the reminder to be related to the authorization data page, select **OK.**      * The **Custom Activity Due** data page will display. Complete the following...   1. Fill in information in the **Activity\*** field,   2. Enter a date for the **Due Date\***   3. Set the **Priority** |
| **4.02 Assign Activity Due** | * In **Section 2: Assign To,** on the **Custom Activity Due** data page, select the **New** button.      * The **Activity Due Staff Assignment** mini window appears.      * You can type the name of the staff member you wish to assign the activity due to in the **Staff** **Member\*** field. Aware will auto generate selections based on your entry.      * You can also search for the staff member by selecting the **Find** button      * This will launch the **Staff Mini-Search** window where you can search by name or unit to select the appropriate staff member. Once your search filters are set, use the **Find** button to see the results of your search.      * Once you select the staff member from the **Results of Search**, their name will auto populate the **Staff Member\*** field back on the **Activity Due Staff Assignment** data page.      * Enter today’s date into the **Start** **Date**\* field and select **Finish** from the **Main Menu** to save your selection.      * The **Custom Activity Due** date page displays. Check to make sure there is a staff member listed in **Section 2: Assigned To**, and then select **Finish** to save and close the page.      * The **Authorization** data page will display, make sure both “**Ready for Review”** and **“Ready for Issue”** are checked off. Then select **Finish** to close the page. |
| **4.03 Complete Activity Due** | * Once you finish out of the **Authorization** data page, you should see the search results that you originally looked up for your activity due’s. Now we need to mark them as **Completed**. * From the search results, under the **Activity Due** column, select the link for the activity due you just completed.      * The **Custom Activity Due** data page will display.      * In **Section 1: General**, use the drop-down arrow in the **Status\*** field to select **Completed**.      * Select **Finish** to save your changes.      * The search results will again display, this time the **Activity Status** should say “**Completed**”.      * Select **Finish** to return to the Aware landing page. |
| **Objective 5: Counselor Checks Activity Due’s & Issues Authorization** | |
| **NOTE: Objective 5 will outline the original counselor completing the final steps of issuing the authorization.**   * **To recap, at this point the counselor has drafted the authorization, assigned the activity due to their supervisor to review the authorization and deem it ready for issue. The Supervisor has gone in and reviewed the authorization via their activity due’s, checked off “ready for issue”, and then created an activity due for the counselor to issue the authorization.** * **Now the counselor will compete the final steps.** | |
| **5.01 Select the Participant Module** | * From the Aware landing page, select the **Participant Module**.      * From the **Case Search** page, under the layout tab, choose the **Activity Due – Staff** layout and select **Apply**. |
| **5.02 Filter your Search** | * From the **Case Search** page, select the **Search** tab. * With the search tab selected, make sure that the **Activity Status** field has its drop-down set to **“(All)”.**      * Now make sure that the **Related Datapage** field has its drop-down set to **“Authorization”.**     Select **Find.** |
| **5.03 Select Related Datapage** | * The **Search Results** should display.      * There are several different columns which have links you can select.   + The **Activity Due** column provides you information about what the activity is requiring, **“Authorization Ready for Issue”** for example.   + The **Activity Status** column provides information on the status of the activity due, e.g., **Completed, Pending: Due, Past due**.   + The **Related Datapage** column will bring you directly to the data page that the activity due is asking you to complete. * Select the **Authorization** link in the **Related Datapage** column, that does NOT have an activity status of “completed”.      * This will bring you to the **Authorization** page related to this activity due. |
| **5.04 Issue Authorization** | * On the **Authorization** page, check to make sure both the **“Ready for Review”** and **“Ready for Issue”** boxes are checked off.      * If **both** boxes are checked off than you can issue the authorization. * From the **Main Menu**, select **Actions 🡪 Issue Authorization**      * An alert will pop up asking if you want to issue the authorization. Select **OK.**      * A second alert will pop up telling you that the authorization has been issued. Select **OK**.      * Depending on your preferences, you may get a **Report Prompt** where you can review or print the authorization.      * Select **Print or Cancel** to return to the **Authorization** page. Select **Finish** to complete the authorization. |
| **5.05 Complete Activity Due** | * Once you finish out of the **Authorization** data page, you should see the search results that you originally looked up for your activity due’s. Now we need to mark them as completed. * From the search results, under the **Activity Due** column, select the link for the activity due you just completed.      * The **Custom Activity Due** data page will display.      * In **Section 1: General**, use the drop-down arrow in the **Status\*** field to select **Completed**.      * Select **Finish** to save your changes.      * The search results will again display, this time the **Activity Status** should say “**Completed**”. |