L200PA003 - Position Approval-20241115_152935-Meeting Recording

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Reutter, Shanon M started transcription

JR **Jensen, Rosemarie** 0:06

Hey, good morning, everyone.

Welcome to the position approval L200 course.

My name is Rose Jensen.

I'm the principal HR specialist with the core HR team.

Today we'll be building on the topics we reviewed in the position management course to delve into the changes to the position approval process that are coming with the upgrade.

As in all of our trainings, we encourage you to ask questions and I'll be pausing several times throughout the presentation to respond to any questions that come up.

Please note a couple of extra items for today.

Accessibility capability is now available in the webinar, though it does need to be turned on on an individual basis.

And then our core CT training page is now available online and the link for that will be provided at the end of the course.

This is a brief review of the roles for today's training.

As your trainer, I'll be covering the course content and answering any questions.

We have a separate facilitator who is sharing the presentation and they will also direct questions to me at the end of each section. And then as the participants, we do ask that you ask questions in the chat throughout the training as you won't be able to turn on.

Your microphone. We are aware that some users don't have the ability to use the meeting chat.

If that applies to you.

You can send your question directly via teams to Cheryl Catania, and she'll post her name here in the meeting, and then she can share your question with everyone in the chat.

Alternatively, you can e-mail readiness@ct.gov who will be assembling a question

and answers to be posted after the class.
So here's a quick glimpse at the schedule for today. The presentation itself will take under half an hour, but we've built in some extra time for questions.
So from a high level perspective, some of the changes that can be expected from the upgrade include the following. The introduction of the fluid dashboard, which consists of upgraded navigations pages and tiles.
Although functionalities will remain similar, it's the look and feel and the ways to access that will change position data and the accompanying approval process have changed significantly in the following ways that we'll discuss in detail today.
The position approval tab is now only available to view historical approval data. In other words, approvals entered in the current system with the fluid upgrade, the position approval tab is replaced by the approval chain which shows the approver roles and names timestamps for each approval and functions of.
The place for Approvers to add their comments there is now a summary page which compares the proposed changes.
To the current position values and adding rows is no longer part of the approved.
Instead, each position transaction is a single row, no matter how many approvals are received.
As a result, approvers no longer enter an effective date or reason code.
And finally, the Notification Center will be the place for necessary alerts and action items instead of a work list.
After completion of this course, users should be able to access the position approval, fluid pages, manage and view pending approvals.
Understand position, approval, processing and navigation and then understand walk through demonstrations that cover the topics of approving or denying positions, as well as pushing back transactions due to incomplete or incorrect information.
A key item to note is that the recycle action is being replaced by the push back.
Action. The purpose is the same.
This is really just a change to the name of the action.
As a refresher, here are some of the terms we'll be using throughout the L.
200 courses.
The Fluid user interface adapts to different types of devices, including smartphones, tablets, as well as your desktop homepages, which we also call dashboards.
These are a collection of tiles that users Click to access transactions. These serve as a personalized entry point for different types of tasks and activities.

A guided process or activity guide.
Theories of actions or steps that users complete within a specific business process.
So essentially an activity guide helps to streamline complex tasks by breaking them down into more manageable steps.
And tiles are shortcut buttons that help you quickly get to important tasks or information without needing to search through menus.
So as I mentioned before, position management and the position approval process have experienced significant changes.
However, it's important to note that while the how of position management and approval is changing, the underlying business processes have not. So transactions that require approval in the current system will require those same approvals in the upgraded system and as in the current system position APPROVERS will have.
The ability to approve, push back or deny position transactions.
However, instead of accessing pending positions from their work list, positions will be accessed through the approvals tile and that tile can be found on both the workforce administrator and manager self-service dashboards.
For the purposes of this course, we will be accessing the approvals tile through the workforce administrator dashboard as shown here.
The full navigation path is core C, T H RMS workforce administrator approvals.
The approvals tile will reflect the total number of approvals pending for that user with a total in the lower right hand corner of the tile. Users will click the approvals tile to be brought to a listing of all transactions requiring their approval.
Once you click on the approval style, you'll be brought to the pending approvals page shown here where all submissions pending your approval will display.
You will notice that new positions and updates to existing positions are listed separately in the left hand panel.
So in this screenshot, there are four new positions under create position and three existing positions to be approved under manage position. So users can then select the right arrow on each individual item to view further.
And enable the desired action. Positions can also be filtered on this page by requester, date, routed and from so meaning the most recent approver of that transaction.
Once you've selected a position to review, you'll be brought to the manage position page displayed here.
Note that this is different than the manage position tile from which position

transactions are initiated.
Here you'll see a summary under proposed changes that list the fields that have been updated on the pending row as compared to the most recent row.
In this example, the position has been submitted for refill approval.
So the reason code refill indicator and position status are all reflected as proposed.
Those changes, this is also where you will take action on the position using the approve, deny or push back button shown in the upper right hand corner.
We will see each of those actions at work later in the course. And finally, this page also has several helpful links that we will take a closer look at now.
The first of these links is view position details bracketed in blue in the screenshot.
Clicking that link will open the pending position transaction in another window so that the approver can review all of the fields on the position row being considered, not just those that have changed.
The approver also has the option of clicking the edit details link from the manage position page. If you click edit details.
Note that you will need to proceed through the activity guide just as you would to initiate a new position transaction in order to make your changes.
You will then be prompted to return to the approval page to approve the position.
You've just added it.
Please note Approvers won't be able to modify the effective date or reason code if those values are incorrect.
Transaction will need to be pushed back.
Next, you may remember the new feature discussed in the position management course, which allows the originator to add attachments either as a document upload or as a note. If the originator has added either to the transaction, the managed position page will include attachment details and the approver can.
Click to open and view the note text or open the uploaded attachment.
The managed physician page also houses the approval chain.
The approver can select the approval chain right arrow to view a list of the approvers that are required for the transaction listed in order of routing.
Note if there's only one user with that role on the approval chain, their name will be shown directly on the approval chain. If there are multiple users with that role, you'll see multiple approvers as shown in the screenshot, and then you can click multiple approvers to view a.
List.

The names and titles of the Approvers.
And the last field to mention on this page is the approver comments box. Since the position approval tab is no longer used in the updated system, this is where APPROVERS will enter their comments when approving, denying or pushing back a position. These comments will be added to the.
Approval chain.
We'll take a closer look at adding comments later in the course when we review examples of taking actions on positions.
And an alternate way to access your pending position approvals is through the notification Bell icon. If a new pending transaction is submitted that requires your approval, a green dot will appear just beside the Bell icon. You can click that icon and a list of items pending your appro.
Will appear.
You can click on the link to be brought directly to the approval page for that position. Once you do, the approval page will appear and function just as it does when access through the approvals tile.
So to summarize, the approval changes access to approved, deny or push back positions is now done through the approvals tile or the notification Bell icon. The view position details link on the approval page allows you to view further details about the position while the edit details link allows.
The approver to update fields on the pending transaction if necessary.
And the approval chain can be viewed by selecting the right arrow highlighted as #4 in this screenshot.
So at this time, I will pause for questions. If you have any, please go ahead and post them in the chat.

CC **Catania, Cheryl** 11:51
I don't have any rows.

JR **Jensen, Rosemarie** 11:53
OK.
All right. We will move on.
All right.
Well, now take a look at approving a pending position transaction.
From the core C Thrms dashboard, select the workforce administrator tile and then

select the approvals tile. And as I mentioned earlier, you will notice that the tile shows the total number of approvals pending your approval in the lower right hand corner.
In this case, there are three.
And clicking that approval tile will bring the user to their pending approvals page.
From here select which position transaction you'd like to open by selecting the right arrow.
Once a position is selected, the manage position page will open for further details.
As we discussed, this page indicates the specific fields that were changed on the pending transaction. In this example, the department and location code were changed.
We have highlighted the approver comments box with the number 5 in the screenshot. As I mentioned earlier, this is where the approver should enter any comments they wish before taking action on the position.
These comments will then appear on the approval chain, along with a timestamp.
When the approval was entered as a reminder, there is no longer a position approval tab. The approval chain replaces that tab in the new system.
So there's not another place for the approver to add a comment.
To view the approval chain for this position, you'll click on the right arrow, highlighted as number six in the screenshot. As an approver, you can quickly see who has already approved the transaction along with their comments. In this example, the agency personnel administrator has approved the transaction and.
It is now pending with the agency budget specialist and you can see the comment written by the Agency personnel administrator at the bottom of the approval chain.
Once all information is reviewed, you'll select approve.
Note that you are not adding a new row as you approve the position and as a result there is no need to enter an effective date or reason code.
Instead, the entire position transaction will be a single row, no matter how many approvals are required.
That also means that all newly established positions will retain the reason code of new throughout the entire approval process.
After clicking approve the approver comments box seen earlier from the manage position page will pop up which serves 2 purposes.
It allows the approver to make sure that they have selected the right button cause highlighted at the top of the box is the action you've selected, and then it also gives

the approver another opportunity to review what they've added in the comments or make revisions before the POS.
Continues on.
To the next approver.
Once the position is approved by all required parties, the originator will receive an alert on their home page, indicated by a green dot next to the Bell icon.
The originator can navigate via the managed position tile to view the approved action.
Notice that there is a link to the approval chain from this view up the position as well.
All right.
And we'll take another brief pause for questions.
All right.

Canty, Zakiah 15:33
No questions.

Jensen, Rosemarie 15:35
Thank you.
All right, let's take a look at pushing back a pending position transaction.
So the navigation and most steps are exactly the same as approving a position. You'll select the position you need to take action on from the pending approvals page as accessed through the approvals tile.
If you find that the position requires additional information or revision before it can be approved, you'll select the push back button.
You can add comments from this screen in the approver comments box or you will be prompted again after clicking push back as we'll see on the next slide.
So this is the pop up for comments that appears after you select push back.
You'll want to be sure to add comments in this box so that the originator will know what revisions are needed before resubmitting the position and of note, since approvers can no longer modify the effective date or reason code if either of those fields needs to be changed the.
Approver will need to push back the transaction once your comments are added, select submit.
And as a reminder, pushing back a position returns the transaction to the originator.
Will then have to review, update if necessary and resubmit.

Once the position has been pushed back, the originator will receive an alert on their home page, indicated by a green dot next to the Bell icon.
They can navigate to the manage position tile to view the position which will have an approval status of. Rework to resubmit a position after it's been pushed back, the originator will need to add a new row with any necessary changes.
And then our last example will show how to deny a position request.
We'll navigate to the pending approvals page through the approvals tile and select the position to take action on.
And then select the deny button.
And then once deny is selected, a pop up window will display.
Your comments should include why the position is being denied.
Any comments entered on the prior screen will appear here, so you can review and edit if necessary once those comments are added, select submit.
This will terminate the approval chain and once that position is denied, the originator will receive an alert on their home page.
They can then navigate through the position management dashboard to view the deny transaction.
The approval status will show as denied and the position status will show as rejected.
At anytime during the approval process or after receiving an alert that the position has been approved, pushed back or denied, users can check the status of a transaction by navigating to the manage position tile. That navigation path is core C, T, H RMS, workforce administrator POS.
Management managed position.
Once landing on the managed to create positions page, search for a position by entering in all 8 digits of the position number, including leading zeros.
Click the arrows on the right of the screen to open the position details.
And then from the position approvals page, click the approvals chain link on the appropriate row.
The approval chain will open in a pop up showing who has already approved their comments, as well as the roles that still need to approve the position.
Note that the approver listed as pending currently has that position awaiting their approval.
The Approvers, who are listed as not routed will receive the position for approval after the pending approval completes their approval.
And as we reviewed the approval process in the upgraded system doesn't require

approvers to add new rows. However, position transactions that were approved in the system currently in use will still reflect multiple rows. So the position shown here has a reclassification transaction effective 10424 sub.
Through the new approval process, the top row will remain.
Proposed until it is fully approved, at which point the approval status will change from in approval process.
To approved the approval, chain link will remain available to anyone reviewing the position to see who approved and when, as well as their comments.
No new rows will be added throughout this process. By contrast, the establishment of this position entered in July 2023, is still comprised of multiple rows. In this case, the establishment was initiated effective 7/28/23 effective sequence 0 and sequences one through three were.
Added by the approvers.
So all of those rows remain available for review in the upgraded system.
We've also discussed the that the position approval tab has been replaced by the approval chain.
4 transactions approved in the current system.
Excuse me, the position approval tab will exist in the upgraded core as a view only feature in order to maintain the position approval history.
So you'll click the approval chain link on a historical row to open the position approval tab in a new window for review, and you'll see the same information you see now.
In the current system.
Alright, so to summarize our course today.
Excuse me, user should now be able to do the following.
Access the approval tile and position approval fluid pages manage and view pending approvals.
Push back a position if more information or revision is required.
Approve or deny a pending transaction and view and understand the approval chain.
Alright. And we'll do one last round of questions.

Canty, Zakiah 21:48
Yes, question says.
What about agencies that do not require approval from external sources?
Will those agencies continue with the same credentials?

JR **Jensen, Rosemarie** 22:04

Yes, there's no change to what approvals are required.

Which is always dependent on your, your department or agency as well as the details of the transaction.

So if you're at an agency that doesn't require external approvals, that's going to remain true after the upgrade.

Canty, Zakiah 22:29

No further questions.

JR **Jensen, Rosemarie** 22:31

You're welcome.

All right.

CC **Catania, Cheryl** 22:36

I don't either rooms.

JR **Jensen, Rosemarie** 22:37

OK.

Thanks Cheryl.

If anything comes up that you think of after the training is concluded, feel free to submit a footprints ticket with any questions you can do that as a regular ticket via the footprints app, or send it to readiness@ct.gov. If you don't have act dot.

Gov.

E-mail address.

And that concludes the position approval course. If you can take a moment to complete the training evaluation, we would appreciate it.

That'll be LinkedIn, the chat, and then this course material will also be posted in the chat as well as on the core CT Modernization homepage, which also has links to all 100 courses, infographics and other helpful materials.

Thank you for joining us today.

Reutter, Shanon M stopped transcription