

SMIS Complaints Module Quick Reference Guide: Workflow Process

Purpose

This document will provide an overview of the workflow process and user permissions in the SMIS Complaint Module.

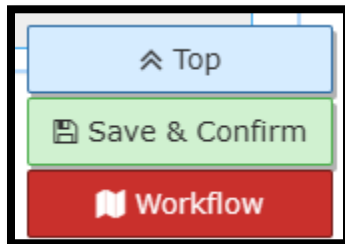
Audience

Users with the following SMIS roles can move a complaint forward in the Complaint Module

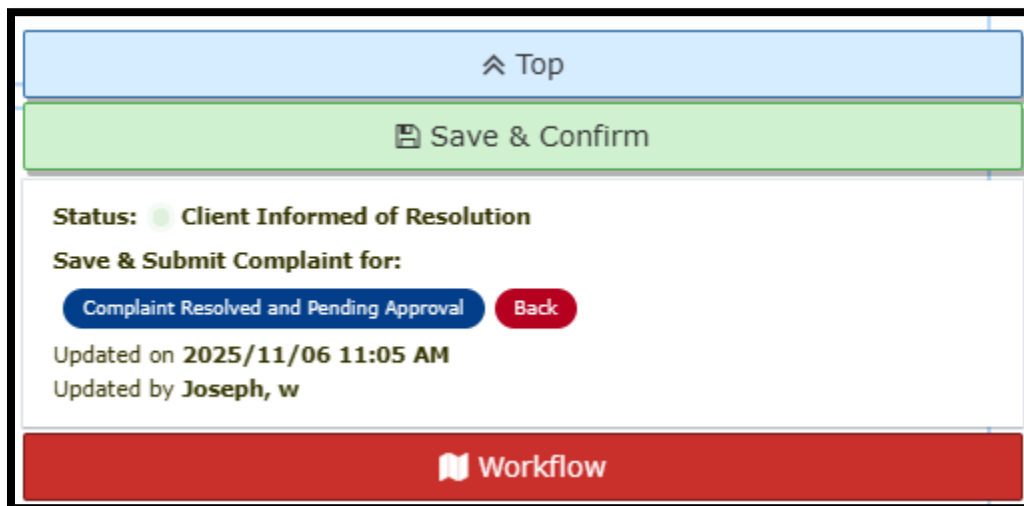
- Supervisor (SUP)
 - Example:
- Manager / Executive Director (MRG)
 - Example:

Workflow Function

The Workflow function allows certain SMIS users to move a complaint entered in the Complaint Module backwards or forwards to the various stages of the complaint process (description/narrative, investigation, resolution, and approval). The Workflow function can be accessed at the bottom-right of the screen at any point in the complaint process (after the complaint has been created).



Clicking on the red **Workflow** button will expand the menu, presenting you with the option to move the complaint forward or backward, as shown below.



Complain Module Permissions

The following table outlines the SMIS roles and their respective permissions within the Complain Module.

Role	Create a Complaint	Enter Details and Save Complaint Within Current Stage	Move Complaint Backward or Forward via Workflow	Approve Complaint Created by Another SMIS User	Approve ANY Complaint
Intake Worker (IW)	✓	✓	✗	✗	✗
Case Worker (CW)	✓	✓	✗	✗	✗
Supervisor (SUP)	✓	✓	✓	✓	✗
Manager/Executive Director (MGR)	✓	✓	✓	✓	✓