

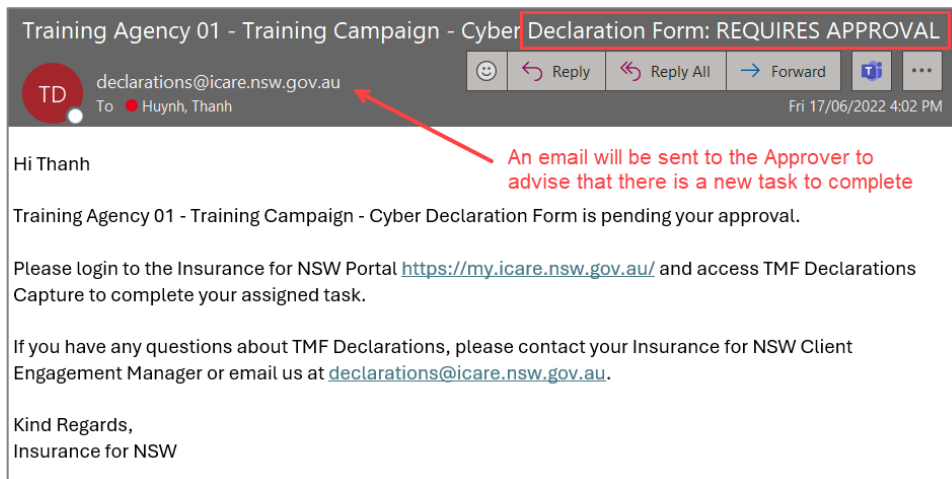
How-To Review, Amend, Approve or Reject Declarations



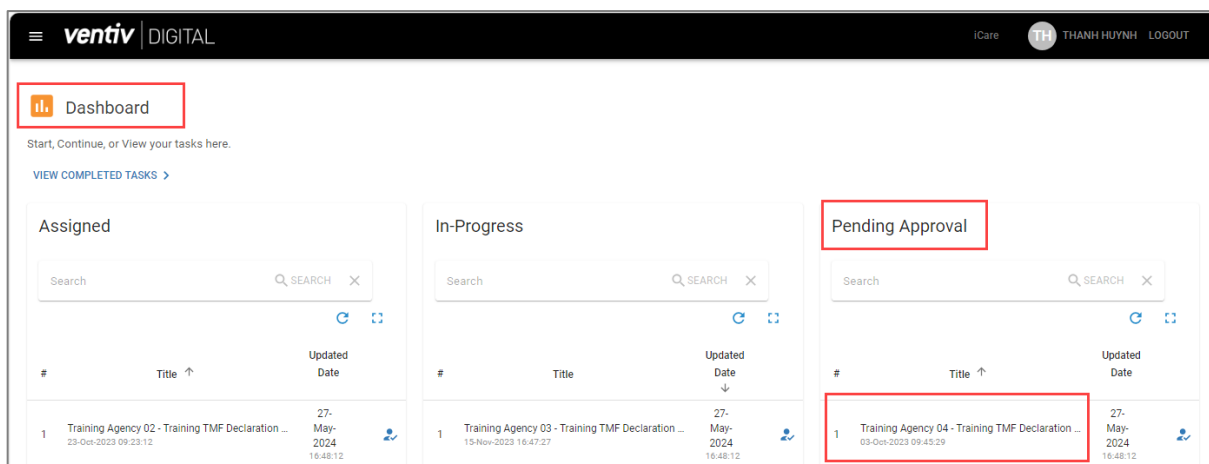
Reviewing Completed Declaration Forms as an Approver

Your role as an **Approver** is to review completed Declaration forms and either Accept or Reject them.

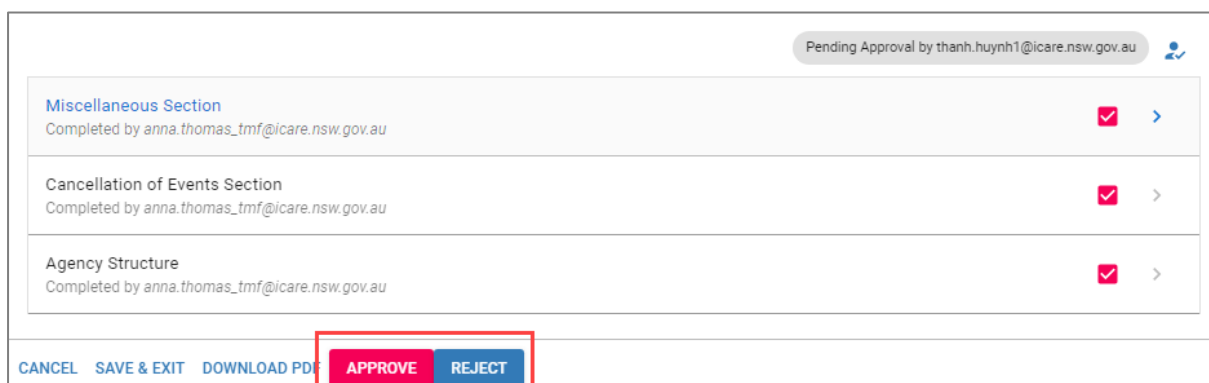
1. You will receive an email for each form submitted for approval by the Coordinator, advising that you have a new task pending for your Review and Approval.



2. Completed forms awaiting approval will be displayed in the Declaration Dashboard under the **Pending Approval** task list.
3. To access the declaration form, click on the assigned task under the Pending Approval task list.



4. On the bottom left of your screen, you will see the **Approve** and **Reject** buttons.



5. To determine the appropriate course of action, please **review** the information declared in **each section** of the Declaration form:

- Click on each section to review the declared information.
- You have the option to download the Declaration form as a PDF document. To do this:
 - Select the **Download PDF** button, which is available on the form.

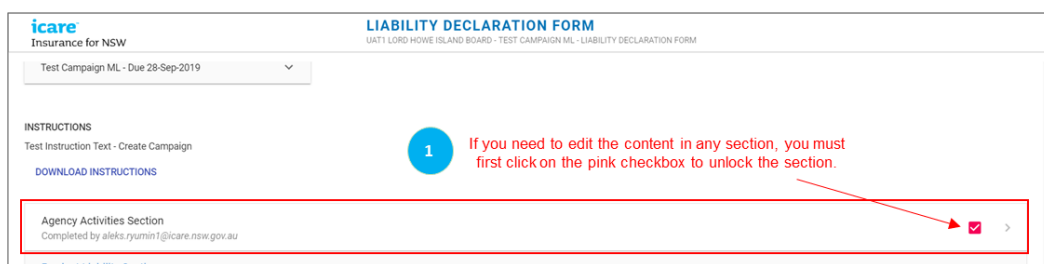


Please note: the PDF document will only include data that was entered on-screen. If you opted to use any Excel templates, or if other documents have been attached as supporting information, please request these separately from the Coordinator or the Delegate.

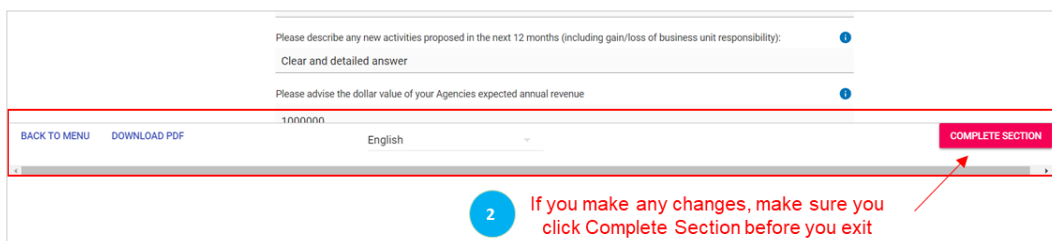
6. As an Approver, you will have the authority to edit the contents of each section.

- To edit a section, **click on the pink checkbox** in the relevant section to unlock the section.

(If this step is not followed, changes cannot be made.)

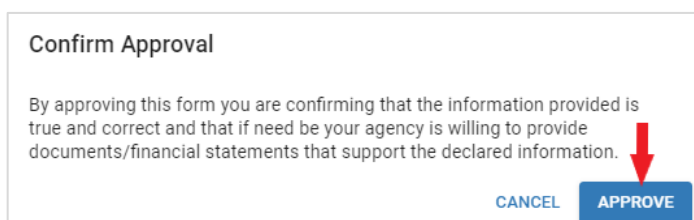


- Confirm to make the section incomplete and proceed into the section to make the necessary amendments.
- Once amendments have been made, select the **Complete Section** button on the bottom right of your screen. **If you do not take these steps, your changes will not be saved.**



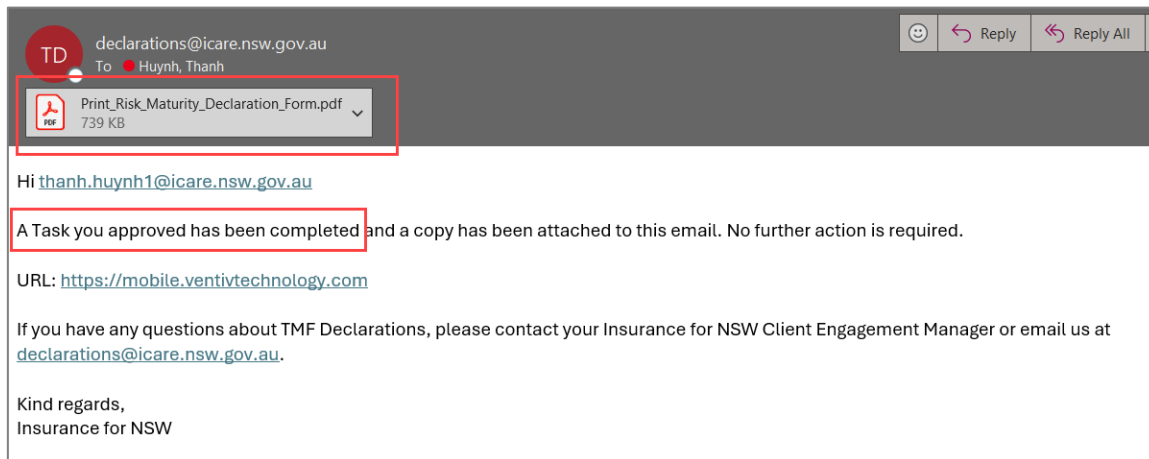
How-to Approve Declaration Forms

1. To **Approve** the form after your review, select Approve. You will receive a pop-up asking to confirm your action.

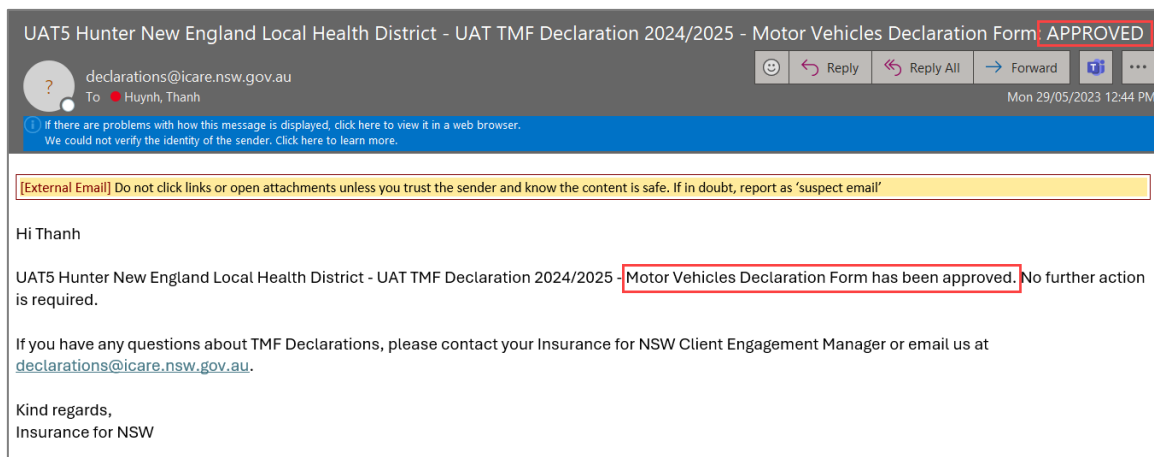


2. The Declaration form will now be sent to the system database.

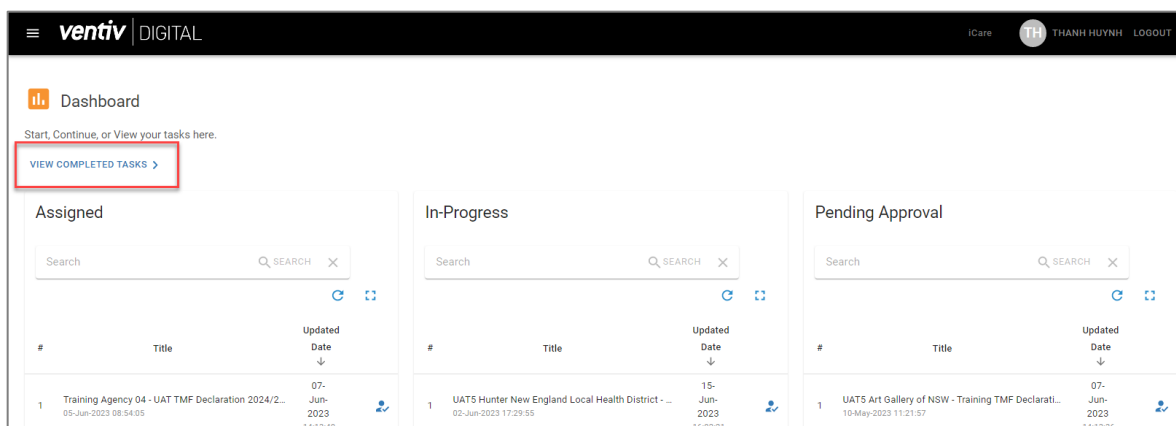
- The Approver will receive a confirmation email with a copy of the Approved Declaration Form.



- The Coordinator will receive an email advising them that the task has been Approved.



3. The approved task will now appear in your Completed Tasks list on your Declaration Dashboard. Click on **View Completed Tasks** (located on the top left of your screen) to review all completed tasks.



Completed

Search SEARCH X

The Coordinator's Completed Task list will show which forms have been approved or still pending approval.

#	Title	Updated Date	Status
1	Training Agency 04 - Training TMF Declaration 2023/2024 - Property Declaration Form 11-Aug-2022 08:34:00	29-May-2023 16:34:14	Approved (✓)
2	Training Agency 04 - Training TMF Declaration 2023/2024 - Motor Vehicles Declaration Form 08-Aug-2022 13:55:28	29-May-2023 16:34:16	Approved (✓)
3	UATS Hunter New England Local Health District - UAT TMF Declaration 2024/2025 - MOH Pharmaceutical Statement and Medical Retrievals Declaration Form 30-May-2023 16:18:52	07-Jun-2023 14:13:34	Pending Approval (⌚)
4	UATS Forestry Corporation of NSW - Training TMF Declaration 2024/2025 - Risk Maturity Declaration Form 10-May-2023 11:21:50	07-Jun-2023 14:13:35	Pending Approval (⌚)

Approved forms are marked with a tick

Forms pending approval are marked with a clock

4. The Coordinator's Completed Tasks list will also show that the form has been approved.

Approved

Search SEARCH X

As the Approver, your Completed Task list will show which forms you have approved

#	Title	Updated Date
1	UATS Art Gallery of NSW - Training TMF Declaration 2024/2025 - Cyber Declaration Form 10-May-2023 11:22:32	07-Jun-2023 14:13:40
2	UATS Art Gallery of NSW - Training TMF Declaration 2024/2025 - Workers Compensation Declaration Form 10-May-2023 11:21:06	07-Jun-2023 14:13:28
3	Training Agency 04 - Training TMF Declaration 2023/2024 - Motor Vehicles Declaration Form 08-Aug-2022 13:55:28	29-May-2023 16:34:16
4	Training Agency 04 - Training TMF Declaration 2023/2024 - Property Declaration Form 11-Aug-2022 08:34:00	29-May-2023 16:34:14

5. The system will perform a final validation check on the approved task. This is to ensure that the submitted contents align with the database requirements:
- Passing Validation – the Coordinator will receive another system-generated email advising them that the task has been successfully received and processed by the system.
 - Failing Validation – the Coordinator will receive an email advising that the task has been rejected. If this happens, **icare will contact the Coordinator directly to determine the most appropriate course of action.**

How-To Reject Completed Declaration Forms

1. To **Reject** the form and send back to the Coordinator to amend, click **Reject**.
2. A **reason is required** for your rejection in the pop-up window. [Your rejection comments should provide clear instructions to the Coordinator. Provide as much information as possible e.g. what the issues were and in which sections they were found].

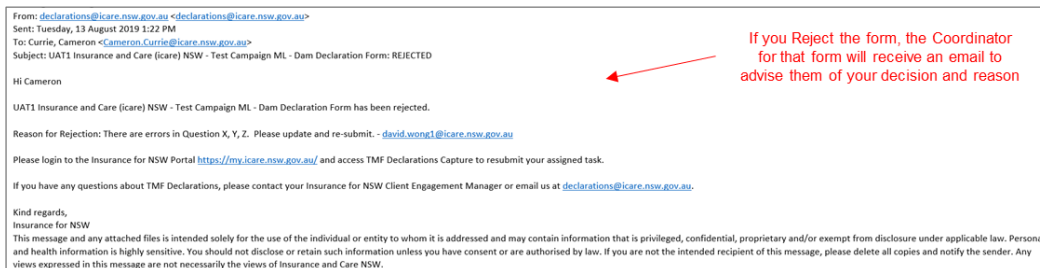
Reject Survey?

Please provide as much information as possible on the reason for your rejection

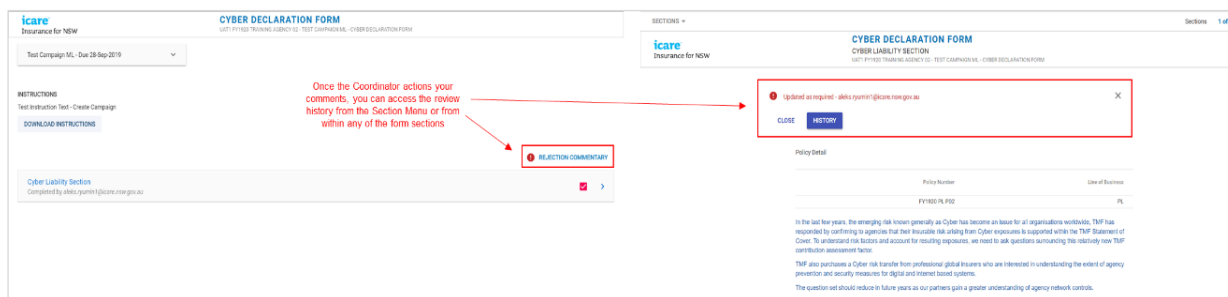
Rejection reason *

I am rejecting this form because all the sections have issues:
Miscellaneous - issues are A, B and C
Cancellation of Events - issues are X,Y and Z
Excess/Franchise - you have entered the incorrect amount

- The rejected task will be removed from your task list and re-assigned back to the Coordinator with a rejected status.
- The Coordinator will receive an email advising them that the task has been rejected, including the reason.



- The Coordinator is required to update the contents as required, before re-submitting the form for approval with supporting comments.
- Once the Coordinator re-submits the form, the Task will once again appear in your **Pending Approval** task list.
- The history of comments associated with the approval process for this form can be accessed by clicking on the **Rejection Commentary** button in the Section Menu, or on the exclamation mark (!) in any of the sections.



If you require further assistance with this, please contact your icare Client Engagement Manager or email declarations@icare.nsw.gov.au.