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How-To Review & Approve Completed Declaration Forms

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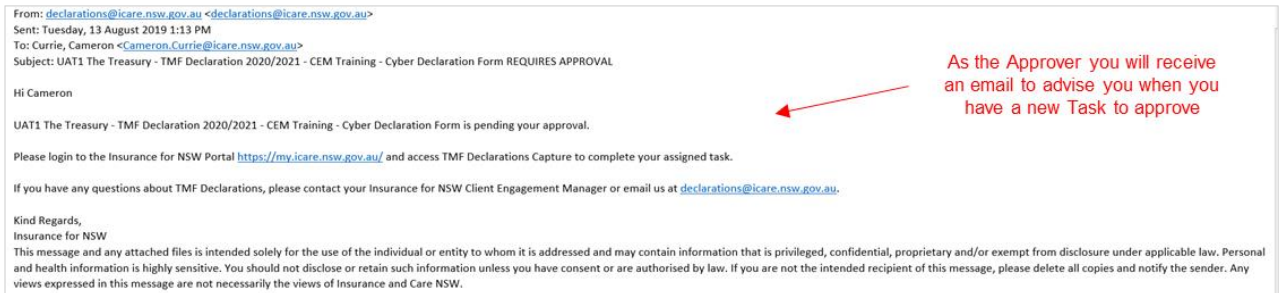
2. Completed forms awaiting your approval will be displayed in your Declaration Dashboard under the **Pending Approval** task list.
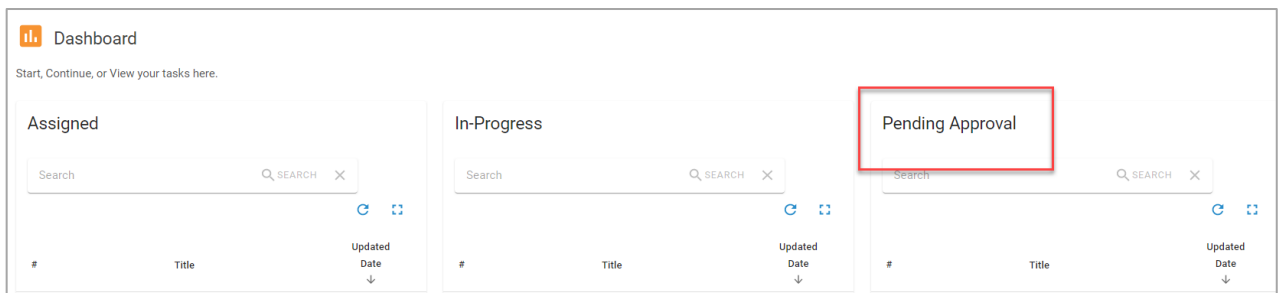
3. To access the declaration form, click on the assigned task under the Pending Approval task list.

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 details declared in **each section** of the Declaration form:

- Click on each section to review the declared information.
- We suggest you download the completed Declaration form as a PDF document. To do this:
 - Click on the **Download PDF** button, which is available within each section of the form.

Please note: the PDF document will only include data that was entered on-screen. If any Excel templates were used, or other documents have been attached, 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, you will first need to unlock the section by clicking on the pink checkbox in the relevant section row.
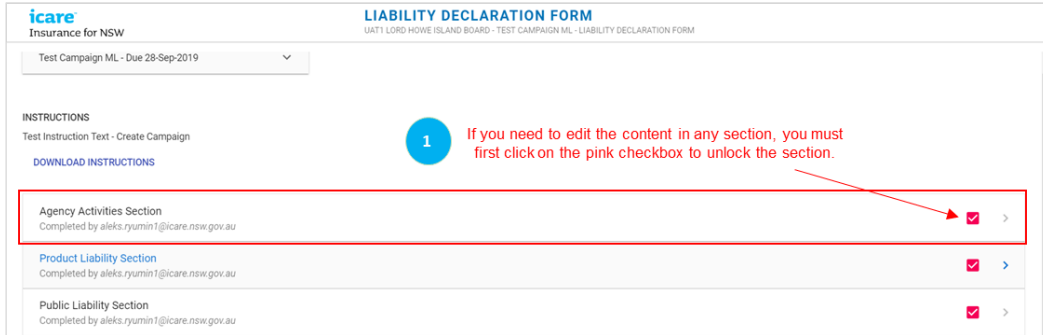

   - Proceed into the section to make the necessary amendments.
   - Once amendments have been made, click the **Complete Section** button on the bottom right of your screen. **If you do not take these steps, your changes will not be saved.**
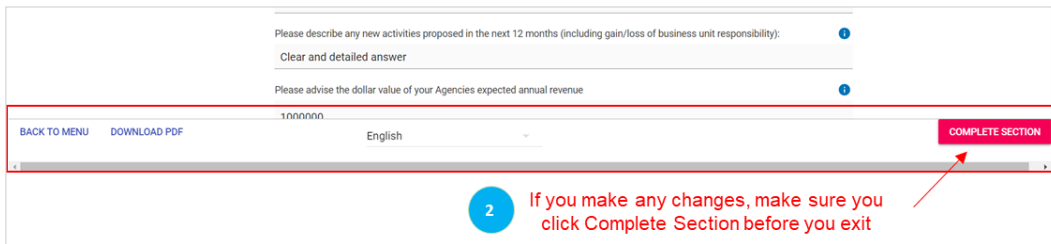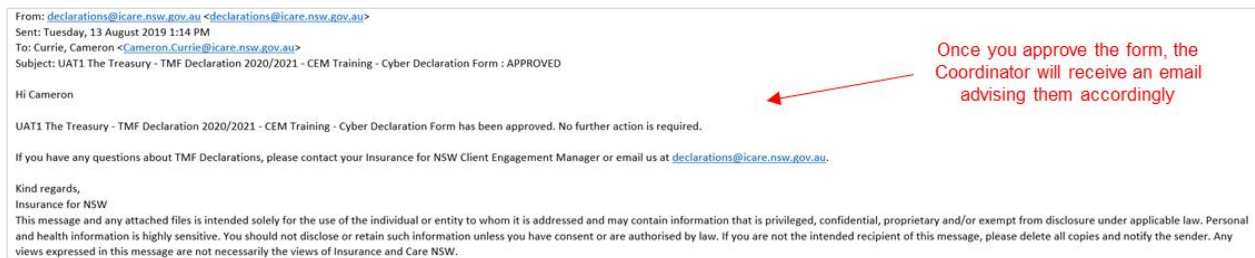

How-to Approve Completed Declaration Forms

1. To **Approve** the form after your review, click Approve. You will receive a pop-up asking to confirm your action.
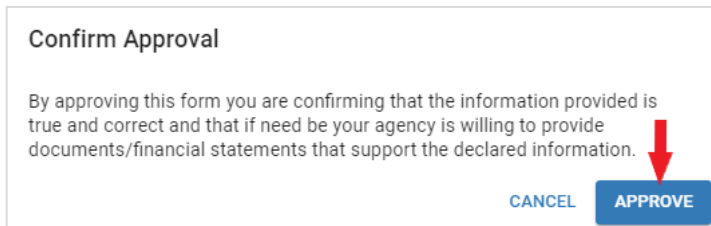
2. This will send the Declaration form to the system database. The Coordinator will receive an email advising them that the task has been approved.

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.

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

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].

3. The rejected task will be removed from your task list and re-assigned back to the Coordinator with a rejected status.

4. The Coordinator will receive an email advising them that the task has been rejected, including the reason.
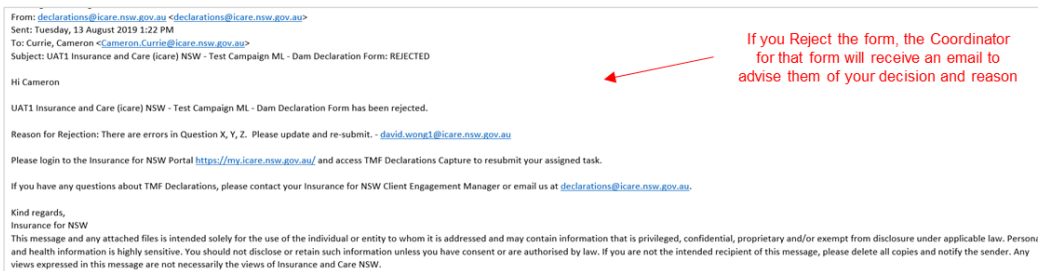
5. The Coordinator is required to update the contents as required, before re-submitting the form for approval with supporting comments.

6. Once the Coordinator re-submits the form, the Task will once again appear in your **Pending Approval** task list.

7. 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.
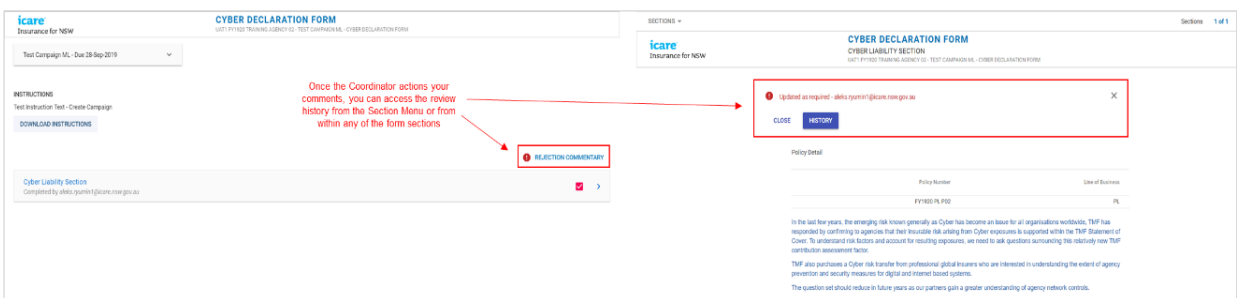
If you require further assistance with this, please contact your icare Client Engagement Manager or email declarations@icare.nsw.gov.au.