MIS2000 Desktop App – COE Approval Instructions

1. Click on MIS2000 Icon to login to Desktop App

2. Click Procedures > Upload Changes… (MIS will check for updates: when complete, or if unavailable, click OK)

3. In Upload Status Popup Box, Click Begin Upload (Wait until pop up box says Your Upload Completed Successfully)

4. Click Ok  (NOTE: You will need to upload changes every time you login to the Desktop App in order to see COEs)

5. Click Close in the Upload Status Box

6. Click View in the top Menu Bar > Select COE Draft (Shows COEs needing your approval)

7. Verify that all of the information in the Family Tab is present and accurate (Parent Names, Address, etc.)

8. Click on the Eligibility Tab near the bottom of the screen > Make sure Items 1 -3 Tab is selected (Located right under the Qualifying Moves & Work Heading)

9. Verify that each of the line items in this tab are completed correctly, then click the Item 4 Tab

10. Verify that all of the information in section 4 is completed correctly (NOTE: 4a cannot be more than 60 days)

11. If 4b is selected, make sure that all fields are filled out correctly. If you have concerns about the information in this section, please contact Laura Alvarez at (602) 542-7463 for clarification. (NOTE: When describing how work was sought, information about where and how the work was sought must be present, example: Applied for work picking grapes at ABC farm)

12. When finished with Item 4, click the Items 5 – 6 tab and verify that all required information is present. Item 6 is only required if the work is temporary.

13. Click the Child(ren) tab at the bottom of the screen to verify information for each child. Make sure all required information is filled in for the child in the Child(ren) Information screen. (Note: You can switch between children by clicking on each child in the bottom menu [Last Name | First Name | Enroll Date | Facility Name | Grade])

14. After you have finished with the child(ren) section, click the Signatures Tab at the bottom of the screen. The parent signature should show up, along with the Signed by Name, Relationship to Child, and Sign Date fields. All of these should be complete.

15. Click the Staff tab right under the word “Verified” (which is in Bright Green). Make sure the recruiter signature, the Interviewer Name, and the Sign Date fields are all completed. (You can ignore the Statement of Need, since this will not ever be used in the Desktop App)

16. If everything looks good with the COE at this stage, proceed with the approval & Final Required Upload processes below. If there are errors on the COE, proceed with the Rejection & Final Required Upload processes below.
1. If everything is good, you (approver) can now sign the COE. Enter your name in the SEA Reviewer Name field, and fill in the current date in the Sign Date field. Click the Sign button under Reviewer Signature. **(NOTE: You will need to sign using your mouse in the box. Hold the left click button down to sign.)**

2. Click on the view log button toward the top middle of the screen to verify that the COE went through all of the proper phases. This log tracks ownership of the COE, date & time stamps, and comments. On a normal COE, you will see an incomplete phase, New phase, and a line where you as the approver took ownership of the COE. If you are approving the COE, no additional comments by you (approver) will be needed in the log.

3. Click the Approve COE button, and the COE will be sent to Patrick Bohanan for Final State Approval.

**REJECTION**

1. If there are problems with the COE, and you need to send it back to your recruiter to make changes, click the reject button near the top of the screen (under the School District Box).

2. This action will pull up the log for the COE, where you can place your comments about what problems exist with the COE. Be as detailed as possible with your reason for rejection in order to aid your recruiter with correcting the errors. **(NOTE: Do not forget that a COE is a legally binding document. If changes are needed, you will need to click yes when the erase signatures box pops up. Any change legally requires a new signature from the parent. Minor changes that do not effect dates, timelines, or legal factors can be made without deleting the signatures.)**

**FINAL REQUIRED UPLOAD**

1. Click Procedures > Upload Changes… (MIS will check for updates: if available it will update, if not, click OK)

2. In Upload Status Popup Box, Click Begin Upload (Wait until pop up box says Your Upload Completed Successfully)

3. Click Ok  **(NOTE: You will need to upload changes in order to send the COE to the State for Final Approval, or send it back to your recruiter for changes. Final Required Upload Steps 1 – 3 can be done individually for COEs, or at the end of the day to send a batch of COEs to the State, and back to your recruiter(s) at the same time)**