



**SSA Director / Supervisor
TIP SHEET**

1. Setting direct reports (Sign on and change dashboard to SSA Supervisor/Director). Set as default.
CRM/Settings/Settings/Administration/Users/SSA/Change Manager/SSA supervisor/Save
2. Assign SSA to Individuals.
Select Individual/county information/Click the assigned SSA search field/click SSA/Save
3. Assign SSA as Budget Support Specialist and Finance Manager.
CRM/Settings/Administration/Users/SSA/check FM box/check BSS box/Save and Close
4. *Configure or change supervisor review settings.*
Open the SSA's front page. Click the down arrow next to the name. Click the "Supervisor Review Setting" tile/change the dashboard to "Supervisory Review Setting Associated View"/click the "+New Supervisory Review" button/ (Deactivate the reviews from the button at the top). Save and Close.
5. Extend the outcome date for an SSA.
Receive a notification to extend the outcome date from the "Notifications" section from your SSA. Click on the link and open the "Extend Outcome's Projected Completion Date" screen. Change the completion date and click "Mark Complete" button at the top. Save and Close.

(The SSA needs to open the Individual's front page, then open the outcome. Scroll down to "extend the outcome date" and change the word "No" to "Yes". This will send the notification to the SSA Director.)

6. Delete a projected service. Sign in as SSA Supervisor/Director (FM, BSS or MDA Data Admin). Outcome and Service Summary must both be "reset to internal." Click the trash can in the Service Listing window of the outcome window. The SSA can reset both the Outcome and Service Summary to internal and delete the service listing.