

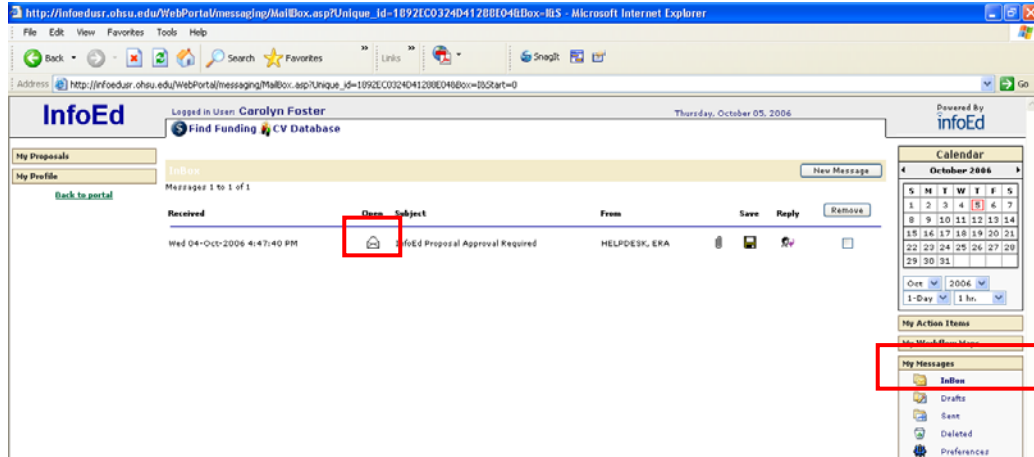
Approval Process

Approval Notification

Once a proposal has been submitted to the route, the first person in the route will receive an email notification.

If you do not receive an email or have deleted it, follow steps below to access message within InfoEd.

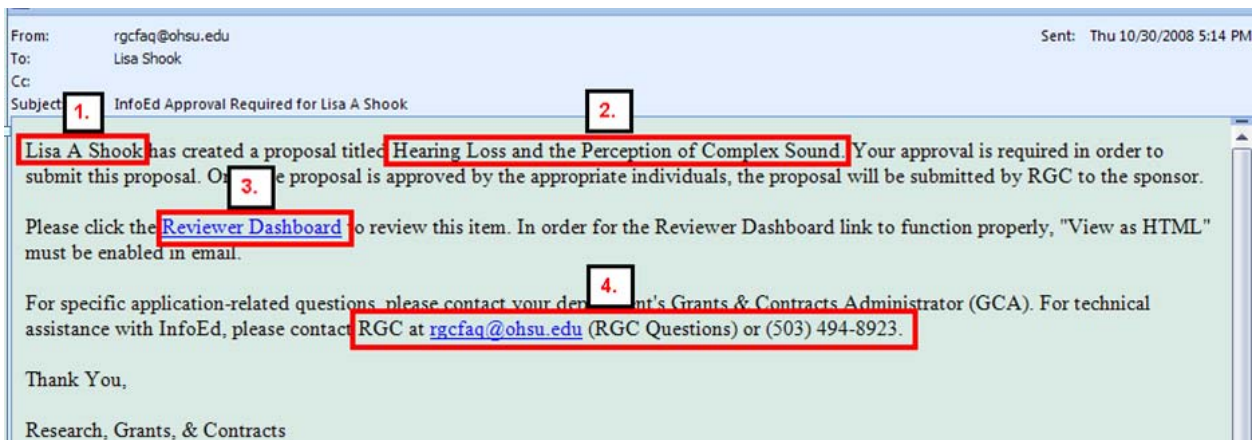
1. Log in to InfoEd
2. Select **My Messages** and then **Inbox** on the right side of the screen.
3. Select the **envelope icon** to open the proposal approval notification message.



The email address used for notifications can be viewed by going to your InfoEd → Profile. If it is not correct, you can send an email with the corrected information to OHSU Human Resources: addresschange@ohsu.edu.

Approval Email

The message informs the reviewer that a proposal is in need of their review and approval. The following information is included in the message specific to the InfoEd proposal requiring approval.



1. PI Name
2. Title of the InfoEd Proposal
3. Reviewer Dashboard hyperlink
4. Address/Phone number to call if questions (or if InfoEd assistance is needed).

Review the Proposal

1. Select [Reviewer Dashboard](#) link in the message.
You may be prompted to enter your OHSU Network user name and password.

For Review Dashboard help select **What's Next?**

The screenshot shows the 'On-Line Review Dashboard' interface. A sidebar on the right titled 'What's Next?' contains three numbered instructions: 1. Review everything under 'Item(s) for Review', 2. Add Comments, and 3. Indicate your decision. A red arrow points from the 'What's Next?' tab in the main interface to the sidebar. Below the instructions, there is a note about adding comments before making a decision.

What's Next?

1. Review everything under "Item(s) for Review". Check the "Done" checkbox next to each item after you have reviewed it.
2. You may choose to "Add Comments" by visiting the tab with the same name.
3. Indicate your decision by visiting the "My Decision" tab. This is the ultimate and final action required of you.

If you intend to "Add Comments", you should do so **before** you set your decision. Once you set your decision and save, you will not be able make any additional changes, i.e. "Adding Comments" or changing "My Decision" after your decision is saved.

2. Select **Item(s) to Review**

This screenshot is similar to the previous one, but the 'Item(s) to Review' tab in the sidebar is highlighted with a red box, indicating the next step in the process.

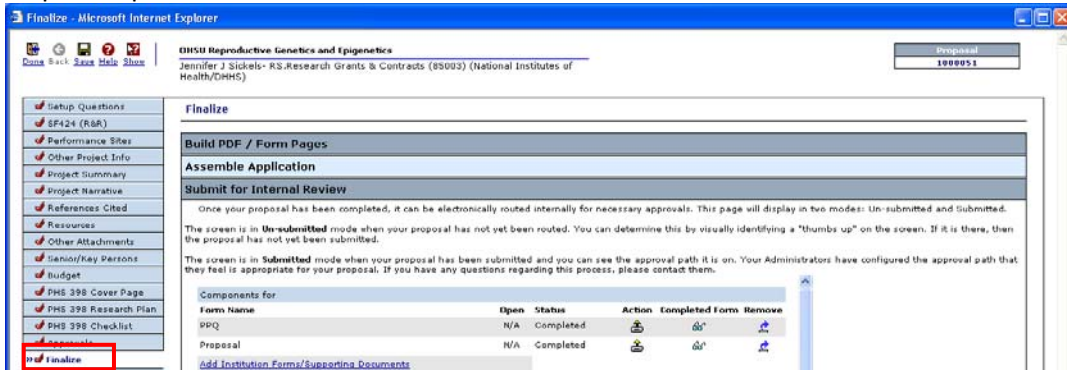
3. Select the proposal **Folder** under the show column to view the proposal.

This screenshot shows the 'Item(s) to Review' section of the dashboard. It displays a table with columns for 'Done', 'Show', and 'Items'. A red box highlights the 'Show' column, which contains a folder icon next to the word 'Proposal'. Below the table, there are instructions about checking the 'Done' checkbox and setting a decision.

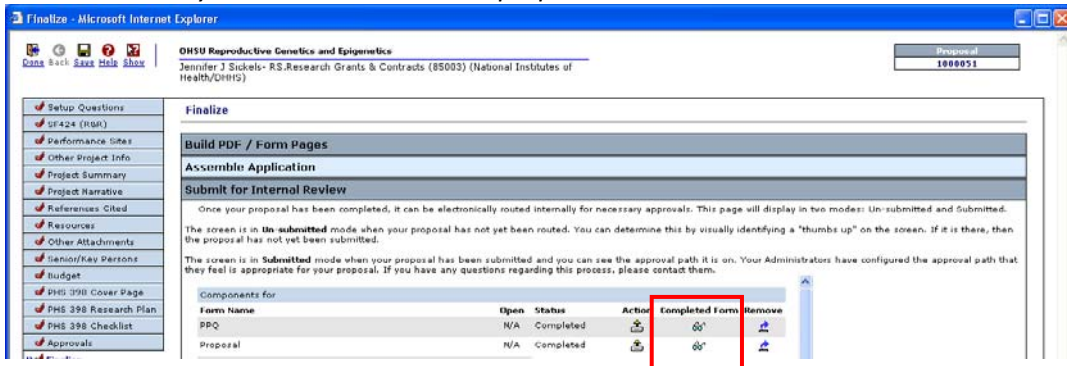
Done	Show	Items
<input type="checkbox"/>		Proposal

When you have completed reviewing each item in the list, please check the "Done" checkbox.
Once all the checkboxes are checked, you will be able to set your decision on the review.

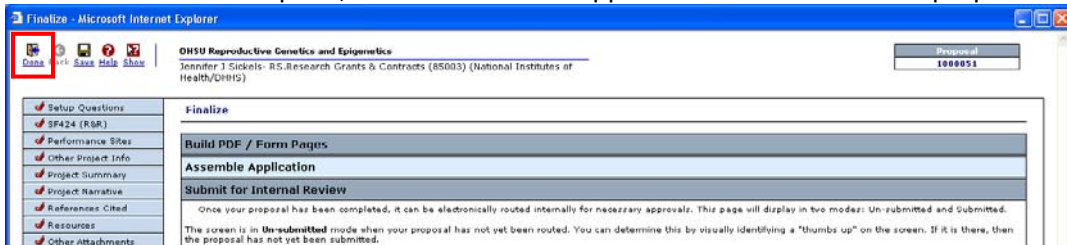
4. Proposal Opens in new window - select **Finalize** tab



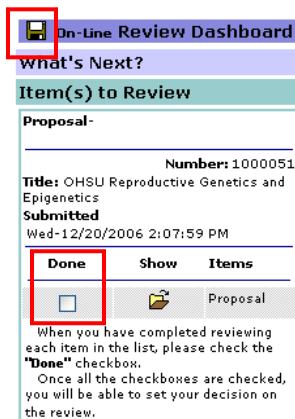
5. Select the **eyeglass icons** view the complete PDF of the proposal and any internal documents. *The reviewer may also elect to review the proposal via the various menu tabs.*



6. Once the review is complete, select **Done** in the upper left corner to close the proposal.



7. Return to **Item(s) to Review**, check the **Done** checkbox next to each item and then select the **Save** icon in the upper left corner of the screen.

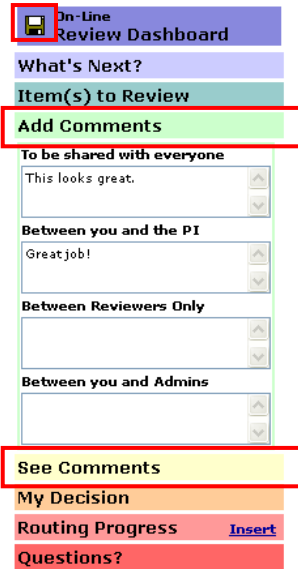


Add Comments (optional)

If applicable, select **Add Comments**, enter comments and select **Save**.

Comments can be entered for 4 different audiences. Subsequent reviewers will only see those comments pertaining to their role/security. The same is true of users who open the proposal within InfoEd. They will only be able to see comments allowed by their role/security.

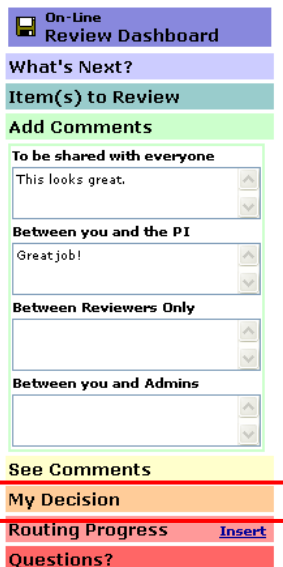
To view other reviewer comments, select **See Comments**.



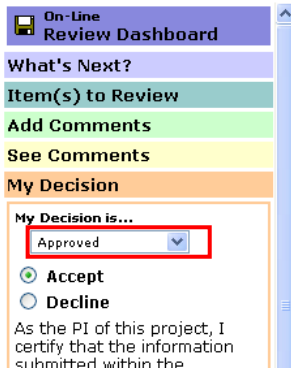
My Decision

This section will allow you to approve or disapprove the proposal.

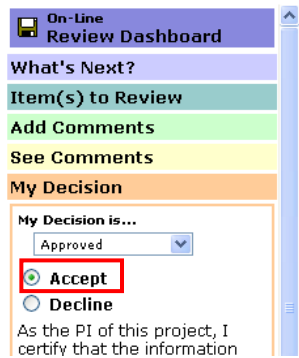
1. Select **My Decision**



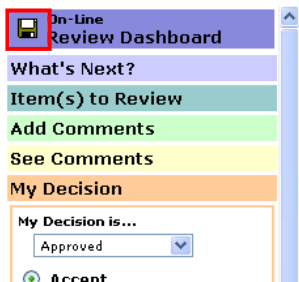
2. Select a **Decision** from the dropdown.
 - **Disapproved and PI Action Required** will discontinue the route and the PI will have to make any necessary changes and re-submit the proposal to the entire route.
 - **Approved** will continue the route to the next approver.



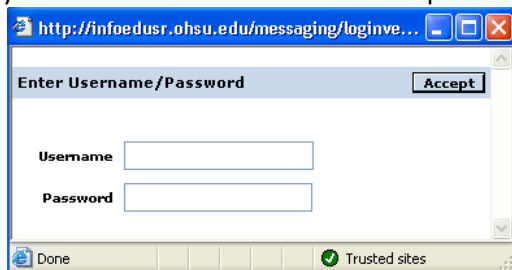
3. Select **Accept**



4. Select the **Save** icon



5. Enter your OHSU Network username and password for the electronic approval and select **Accept**.



At this point, your review is complete. If the proposal was approved, the proposal will continue to the next step and the appropriate individual will be notified. If the proposal was disapproved, the routing will stop and the PI will be notified.