Review Creation and Assignment Process

Cheat Sheet

There is a cheat sheet attached to this page. Please click on the 'Cheat Sheet' heading above to download.

- Cheat Sheet
- Step One: Gather the requirements
- Step Two: Check the Review Stage Setup
- Step Three: Create the Form and activate it
- Step Four: Activate the form
- Step Five: Assign the Form to Users
- Step Six: Create a Committee (Optional)
- Step Seven: Create Reviews
- Step Eight: Check to make sure it looks good
- Step Nine: Clean up Test Reviews

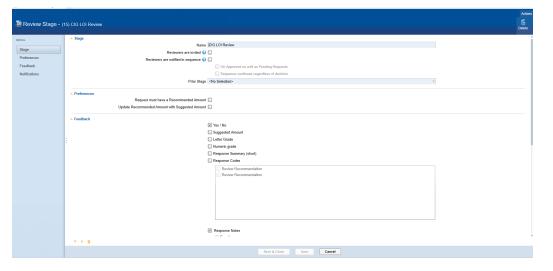
The entire process of creating and assigning and testing a review best goes through the following 7 stages:

Step One: Gather the requirements

Make sure you know what is needed to be in the review. Fields, Scores, mandatory fields, assignee

Step Two: Check the Review Stage Setup

Dashboard > Ribbon Menu > Admin > Reviews > Review Stage Setup > Edit only if absolutely necessary



Setup here will override any setup in the form. Any system related fields (non-custom field) is being setup here and added in the actual form also.

If wee need to see something like Yes/No or Long Notes which are system fields, we have to specify them here.

Also, under review notes, it is better that we leave the questions blank except for the Long Notes Field. Anything entered here will override the label of the field in the form.

Step Three: Create the Form and activate it

Dashboard > Ribbon Menu > Admin > Blueprint > Form Library > Reviews > Edit

| E Reviews Form - 20 Review Stage: CIG LOI Review | 2019 CIG LOI Technical Review (46, Active) w. Groups. (none). Users: 6 | | Details Repo | | * activate | activate Ast |
|--|---|---|--------------|-------------------------|--------------------------------|--|
| Area Flada Andre Flada Andre Flada Andre And | Request Number: Move Forward / | - | | Eligit Note Instr | : Fo iility s ucti | Forward |
| ppicare Qualifications Sco verage of Totals for This G ased on your review, selec udget Score apacity and Feasibility Poir IG Stage 1 Total Point Calc IG Stage 2 Total Score | Wi-based, oneprotit, IK-S tax-kernet, SVIC3 Lead Applicant has annual budget > \$500K Established academic partnership with an ligble academic partnership with an Clear description of health outcome Clear des | | | Lab O I Est | oel Defa tablis pel P | Default |
| City Town or Village Clarity of Focus Clarity Point Value Clarity Articulates health ou Clarity Articulates specific h Clarity Acticulates specific h | Clearly describes aystem change goals a Storg evidence of community leadership @ Clearly describes aystem change goals a Storg evidence of community leadership @ Clearly describes with it. a of partners and roles | | | Tru rec | ue/Fa quirec Read | equired Set ue/False fie quired Read Only structions |
| Commitment to Community Community Catalyst Total P Community Collaboration Tc Community Engagement (P) | Neview Long Notes | | J | <u>۲</u> | Defa | Ip Text Default ⊙ ease check |

NOTE: Form Designer will be explained in details in a separate page. This is an overview just to get us going.

Here we have the following options:

Red Box: Name of Review and number of people the *review form* is assigned to

Green Box: Libraries you can choose fields from. For example custom fields, coding sheets, standard fields. The application is also able to access extended fields from entities that have not much to do with the review and therefore, they are read-only fields for instance request number, etc.

Pink Box: Is loaded with available fields based on selection in Green Box. These fields can be added to the field by drag and drop into the area in Black Box.

Black Box: Has the final look and feel of the form

Yellow Box: Appears when a field is selected. It has options to modify the field.

Brown Box: Actions available to the entire form.

Step Four: Activate the form

Also, after creating and saving the review, from the ribbon menu (brown box), choose 'Activate'.

If there is another form for the same stage, make sure to go in and hit 'Deactivate' to get the new form show up.

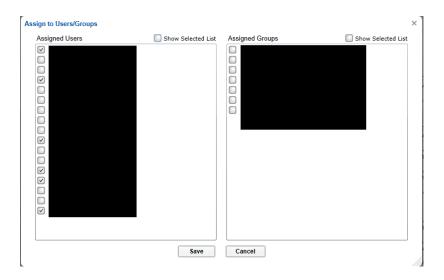
Step Five: Assign the Form to Users

Dashboard > Ribbon Menu > Admin > Blueprint > Form Library > Reviews > Actions > Assign to

| | Acti | ons | Options |
|------|----------|-----|---------|
| Open | New Form | Ass | sign to |

Clicking the Assign to brings the following screen up were we can choose who should this screen be assigned to.

It will un-assign the previous form from their environment and assign the new form to them.



Step Six: Create a Committee (Optional)

Dashboard > Ribbon Menu > Admin > Reviews > Manage Committees > Create new or modify an existing one

| Ha Committee - (10) 2 | 2019 LOI CIG REVIEW | | |
|--------------------------------|--|--|--|
| DETAIL General Reviewers | A General Reviewers | Name [2019 LOI CIG REVIEW Note: The order of members here will be the initial order when this committee is used in sequential review assignment. | |
| | | Name, Title, Organization Available? Other Committees 1 Image: Community Catalyst 2 Image: Community Catalyst 3 Image: Community Catalyst 4d4 Remove | |

It is not necessary, but best practice to create a committee and add reviewers that way. Here reviewers can be added or removed. It also indicates if there are other committees that the reviewer is part of.

Step Seven: Create Reviews

Search for Requests > Choose Requests > Actions > Assign Reviewers > Select Stage > Select Committee (or specific reviewers one by one) > Select Stage > Select Committee

This stage is self explanatory.

Step Eight: Check to make sure it looks good

Dashboard > Ribbon Menu > Launch > Reviewer Portal

It is a great idea to create some tests and login to Reviewer Portal to make sure it looks alright.

Step Nine: Clean up Test Reviews

Full Search > Reviews > Add Filter > Choose Stage and Reviewer > Search > Select All > Actions > Delete

Also important to cleanup the test reviews.