Review on Behalf of Another

Overview

If a reviewer is unable, for any reason, to turn in their review via the Reviewer Portal, it is possible for Admin staff to enter the text and scores of the completed review from a document the Reviewer has sent. This is not desirable but sometimes necessary, and requires that the Admin log in as a specially created Contact consisting of the Reviewer's name and the Admin's (non-default) email.

Perform an Admin Review

A. Prerequisites

1. Have an email (the 'shadow email') that is
    a. Not in the system
    b. Accessible by the Admin, i.e. the Admin has the ability to see any of the emails sent to that address

2. Have Reviewers last name and Type of Review on hand

3. If the Reviewer couldn't log in because of duplicate contact-emails, you must first fix that problem as follows:

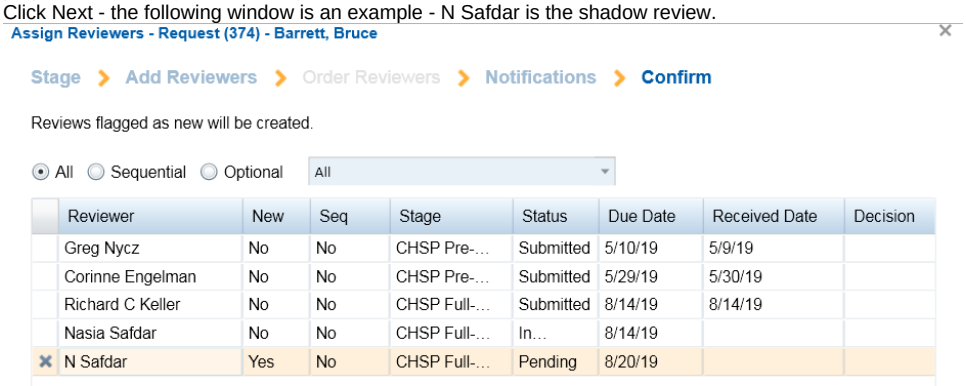
    a) DELETE the email field of ANY other contact for the same REVIEWER

    b) Let the reviewer know you did this and get an alternate email for that contact, or merge the two Contacts into one

B. Steps to Enter the Review

Note: It is helpful to look at the Reviews, Reviewees, and Requests that are applicable and make notes of their IDs to help verify cleanup at the end.

1. Create a new Contact with the same last name as the reviewer [New Contact].
    a. Use the same last name as the Reviewer, and just an initial for the first name - you will later merge this contact with the real Reviewer's contact, that is, it will be deleted from the system.
    b. Set the E-mail field to an email you have access to, 'THE SHADOW EMAIL'. **This email should not already be in Blackbaud Grantmaking.**
    c. Check the 'Reviewer Portal Access ' box in the Contact form
    d. Save and Close
2. Open the Request(s) to be Reviewed
    a. To get the correct Request(s), do a search for the Reviewer as a Contact
        i. Select the correct Reviewer and click on Requests in the Related panel at left
        ii. Select the Requests whose Reviews are to be entered by the Admin
    b. Open the Request(s) and click Actions -> Manage Reviews CAN ONLY DO THIS ON THE REQUEST FORM
    c. Add a new Reviewer, using Type of Review, e.g. Community, etc. Note that the Type of Review indicated here is in addition to the Fund:Subfund:Stage designation. As in the Community example the full review designation would include Fund (PERC), Subfund (CSHP), Stage (Full) and Type (Community or not - a non-Community type of review may use some kind of Executive committee and have no further designation in its actual name).
    d. Click Next and ensure 'Create Activity Record' box is checked. We want a formal record of the review for audit purposes, that's why we are doing this.
    e. Click Next - the following window is an example - N Safdar is the shadow review.



    f.
    g. Click the 'Create Reviews' button
3. After you Create Reviews you should get an email to start a Review
    a. At this point, if the Reviewer that couldn't access the Portal has sent in more than one Review, go back to Step 2. to create another Review for every remaining review. Note: You can also do this later, but you will have to refresh your Review Portal Dashboard to see the new Review assignment
4. Follow the email link to open your Review account in the Reviewer Portal.
    a. Set your password and security questions
    b. Once in the Portal, see the Review, cut and paste the Reviewers responses and scores, and Submit after carefully reviewing your entries.
    c. Before going to the next step, enter all Reviews needed for this Reviewer.

C. Cleanup

1. Merge the Contacts
    a. Find Contact last name. You can re-run the original search you did for the Reviewer as a Contact.
    b. Select the two rows that represent the original Reviewer and the Admin Reviewer
    c. Click Actions -> Consolidate Duplicates
        i. Make sure the Valid (original Reviewer) Record is on the LEFT – if not, you can put it there by clicking the little arrow on the upper right hand of the original Reviewer's displayed card.
2. Delete any In Progress Reviews
    a. Batch open all Reviews for this Review Type for this Reviewer
    b. You can click through all the Reviews with arrows at the bottom of the screen.
    c. You will see the ones just entered as Admin Reviews, as well as empty ones for the same Requests.
    d. Delete the empty ones. If you have noted the In Progress Reviews at the beginning of this process compare the ID's to make doubly sure you've deleted empty reviews.

