

USER MANUAL – APPROVE OR DECLINE FORM SUBMISSIONS

TARGET AUDIENCE: APPROVERS

Updated November 1, 2024

HOW TO APPROVE A FORM SUBMISSION

If you are a verifier (approver) in the approval workflow for a form, you will get a notification letting you know that you have form submissions that require your attention.

To view the form that requires approval, select the eye icon beside the form submission in your “Review Form Submission” dashboard on the form’s homepage.

Submitter	Form	Status	Approvals Completed	Approvals Required	Next Reviewer	Days Since Submission	Date Requested	Date Approved
PGME Travel and Housing Application Form (Internal Applicants)	PGME Travel and Housing Application Form (Internal Applicants)	Pending Verification	0	1		8	24-Oct-2024	
UGME Travel and Housing Application Form (Internal Applicants)	UGME Travel and Housing Application Form (Internal Applicants)	Pending Verification	0	1		8	24-Oct-2024	

Once in the form, you can approve by selecting “Accept” in the top right-hand corner of the form.

From there, you will need to confirm the approval by selecting “Approve” and, if you want, provide feedback to the submitter.

Once you approve a form, it will change to a status of “Approved” in your dashboard and the submitter will be notified.

HOW TO DECLINE A FORM SUBMISSION

Follow the same steps for approving a submission, but instead of selecting “Accept,” you will select either...

“Reject” – This means that the entire form will be rejected and change to a status of Declined. The submitter will be notified that their form was declined.

From there, you will need to confirm the rejection by selecting “Reject.” You must provide feedback to the submitter with a reason for the rejection.

Reject Submission

PGME Travel and Housing Application Form (Internal Applicants) submitted by [redacted] on 24-Oct-2024.

Reason / Feedback *

Explain the reason for rejection

Reject **Cancel**

OR

“Decline and Forward” – This means that you are declining this form, but another approver in the workflow could be forwarded this request and still accept/approve it.

Distributed Campus Clinical Placement Application (External Applicants) (v20)

Current Reviewer [redacted]	Role First Choice Approver	Date Received	Status Approval Pending	Accept Decline and Forward
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From there, you will need to forward the form to the next approver (the system will indicate who is next in the approval chain) by selecting “Decline and Forward.” You must provide feedback to the submitter with a reason for the rejection.

Decline and Forward Submission

Distributed Campus Clinical Placement Application (External Applicants) submitted by [redacted] on 01-Nov-2024.

Second Choice
8

Next Reviewer

[redacted]

Role

Second Choice Approver

Reason / Feedback *

Explain the reason for forwarding

Decline and Forward **Cancel**

QUESTIONS?

If you have any questions or difficulties with this process, please contact the FHS Forms Manager Team at fhsforms@mcmaster.ca.