

USER MANUAL – REVIEW FORM SUBMISSIONS

TARGET AUDIENCE: FORM ADMINISTRATORS

Updated November 1, 2024

HOW TO REVIEW FORM SUBMISSIONS

As a Form Administrator, you have read only access to all form submissions for the form that you own. You can refer to the “Review Form Submissions” dashboard on your Forms homepage to...

- Review any form that require attention
- See what status of the form is (i.e. pending, approved, etc.)
- See how many approvals are required vs. completed
- See who the next verifier (approver) is in the approval workflow
- See who submitted the form and when
- Etc....

You can use the filters to search for any specific form, status, etc. The “filter grid” will search the data on the dashboard you have filtered.

The screenshot shows the 'Review Form Submissions' dashboard. It includes filter fields for Submitter, Date Range of Submission, Form Name, and Form Status. The Form Status filter is set to 'Pending Verification'. Below the filters, it shows 'Showing 1 to 2 of 2 results'. A table lists two submissions, both for 'PGME Travel and Housing Application Form (Internal Applicants)', both with a status of 'Pending Verification', 0 approvals completed, 1 approval required, and a next reviewer of 'Andres Pardo'. The date requested is 24-Oct-2024 and the date approved is blank. An eye icon is visible in the 'Date Approved' column for both rows.

Forms submissions can have one the following status’:

Status Legend

- Draft** - Form has been saved but not submitted for approval.
- Approved** - Form has been approved by all required verifiers.
- Withdrawn** - Form as been withdrawn and will not be reviewed.

- Pending Verification** - Form requires approval from one or more verifiers.
- Declined** - Form has been declined by one or more verifiers with an explanation in the comments.
- Expired** - The approval of the form has expired.

If you want to see a copy of the form you can either...

1. Select the eye icon beside the form submission...

This screenshot is identical to the one above, but the eye icons in the 'Date Approved' column of the table are highlighted with a yellow background to indicate they should be clicked to view the form.

OR

2. Download the form submission(s) using the export functionality or the export icon beside the form submission...

Review Form Submissions

Submitter: [Dropdown] Date Range of Submission: [Date Range]

Form Name: [Dropdown] Form Status: [Dropdown] Export Clear

Showing 1 to 14 of 14 results Filter Grid

Submitter	Form	Status	Approvals Completed	Approvals Required	Next Reviewer	Days Since Submission	Date Requested	Date Approved
<input checked="" type="checkbox"/>	PGME ELIGIBILITY Travel and Housing Application Form (Internal Applicants)	Approved	1	1		0	01-Nov-2024	01-Nov-2024
<input type="checkbox"/>	PGME ELIGIBILITY Travel and Housing Application Form (Internal Applicants)	Approved	1	1		0	01-Nov-2024	01-Nov-2024

If you want to download a form submission, please note that you can only do so once the form has been **approved**.

Important Note: If you have both an Approver and Form Administrator role, you will have to toggle in your Review Form Submissions Dashboard between...

Administrative View – Read only access to all form submissions for the form that you own.

Review Form Submissions

Submitter: [Dropdown] Date Range of Submission: [Date Range]

Form Name: [Dropdown] Form Status: Pending Verification Forms View Administrative View Export Clear

AND

My Forms – All forms that require your attention as an approver, i.e. read/write access.

Review Form Submissions

Submitter: [Dropdown] Date Range of Submission: [Date Range]

Form Name: [Dropdown] Form Status: Pending Verification Forms View My Forms Export Clear

Showing 0 of 0 results Filter Grid

There is likely to be overlap in the forms you see in the different dashboard views.

QUESTIONS?

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