

USER MANUAL – REVIEW FORM SUBMISSIONS

TARGET AUDIENCE: APPROVERS

Updated November 1, 2024

HOW TO REVIEW FORM SUBMISSIONS

Refer to the “Review Form Submissions” dashboard on your Forms homepage to...

- Review any form that require your 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. At the top, there are filters for 'Submitter', 'Form Name', 'Date Range of Submission', and 'Form Status'. The 'Form Status' filter is set to 'Pending Verification'. Below the filters, it says 'Showing 1 to 2 of 2 results'. A table lists two submissions, both with a status of 'Pending Verification'.

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	

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- Withdrawn** - Form as been withdrawn and will not be reviewed.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 with yellow eye icons added to the 'Date Approved' column of both rows in the table, indicating that the user has selected to view the form details.

OR

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

Review Form Submissions

Submitter: Date Range of Submission:

Form Name: Form Status:

Showing 1 to 14 of 14 results Filter Grid

<input type="checkbox"/>	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**.

QUESTIONS?

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