

Processing Your Approvals

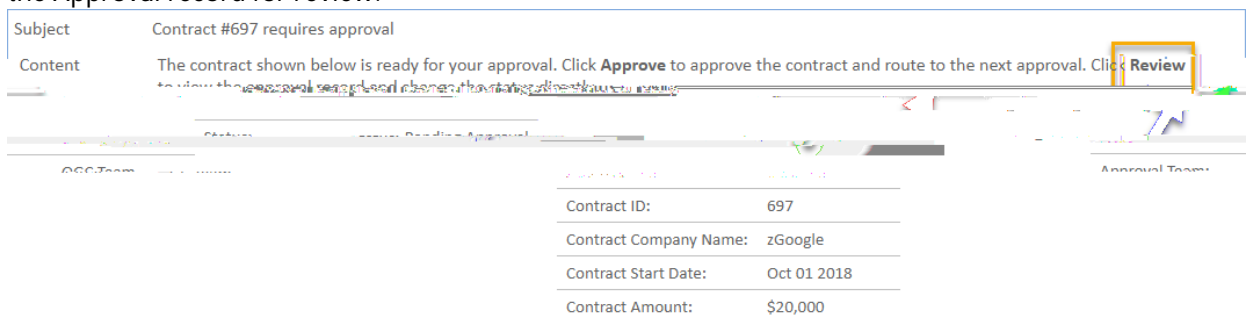
When a contract requester submits a contract, it first routes through Contract Type and Compliance Approvals, after which it will go to the specified Contract Manager. (The choices of contract managers for each department are configured by the administrators of the system.)

Once the Contract Manager is ready, they will send it on the Department Approver(s).

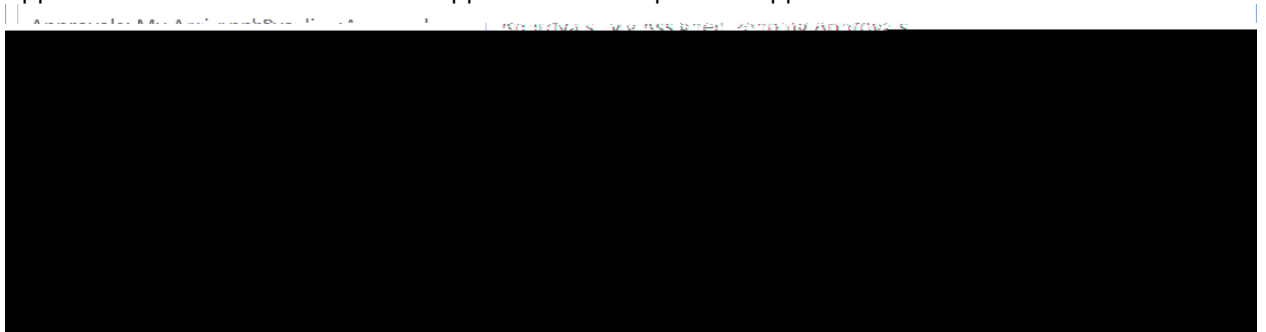
Finding Your To-Do List

There are three main ways to see your Pending Approvals:

1. Email. You will receive an email when your approval is required. Click the "Review" link to open the Approval record for review:



2. Contract Approver Home Page. The Contract Approver Home Page lists your Assigned Pending Approvals. Click the Edit icon or the Approval Title to open the Approval record for review:



3. My Assigned. The My Assigned section in the top menu under Approvals lists your Assigned Pending Approvals, along with the total number of records requiring your approval.

Click that search to display the results and open the record for review as described in option 2 above.

Review Pending Approval

To review the contract request:

1. Get an overview of the Approval by looking at the Approval form and looking at all the tabs.
2. Review any attachments, turn Track Changes on, and add comments or make changes as necessary.
3. Review specific contract request details as necessary.
4. Look at who else will be approving it.
5. Determine whether anyone else is needed, and add them as necessary.
6. Add any notes to Approval Notes. Notes are required if you will not approve.
7. Click Approve to Approve, or click Require Changes to send it back to the Contract Manager.

Details Tab

Approval Management

Save, Cancel, Refresh, Deleted Accounts, Email, Print

Collapse All

TEB01 - Relate Care/Service Agreement - HRWF (InfoSec Team)

Approval Title

835 SLUCare Clinical Affairs SLUCare Administration contractmanager1... contractmanager1... D445

836 SLUCare Clinical Affairs SLUCare Administration contractmanager1... contractmanager1... D445

845 SLUCare Clinical Affairs SLUCare Administration Mary Lynn Thompson Mary Lynn Thompson

▼ Approval Details

Step Number: 1

Approval Team: InfoSec Team

Approver: [Dropdown]

Department Approvers: [Dropdown]

Status: No records

Other sections include:

Approval Management

Approval Notes

▼ Approval Running Notes

approval-running-notes

▼ Attachments

Status: 1 record(s) found, 1 page(s). [Click here to recount records.](#)

ID	Attachment Type	Attached File
477	Document Provided by Outside Party	Relate Care Agreement.docx

▼ Contract Details

Contract ID: 477

Contract Name: Relate Care/Service Agreement - HRWF (InfoSec Team)

Contract Status: Active

Contract Manager: contractmanager1...

Contract Approver: Mary Lynn Thompson

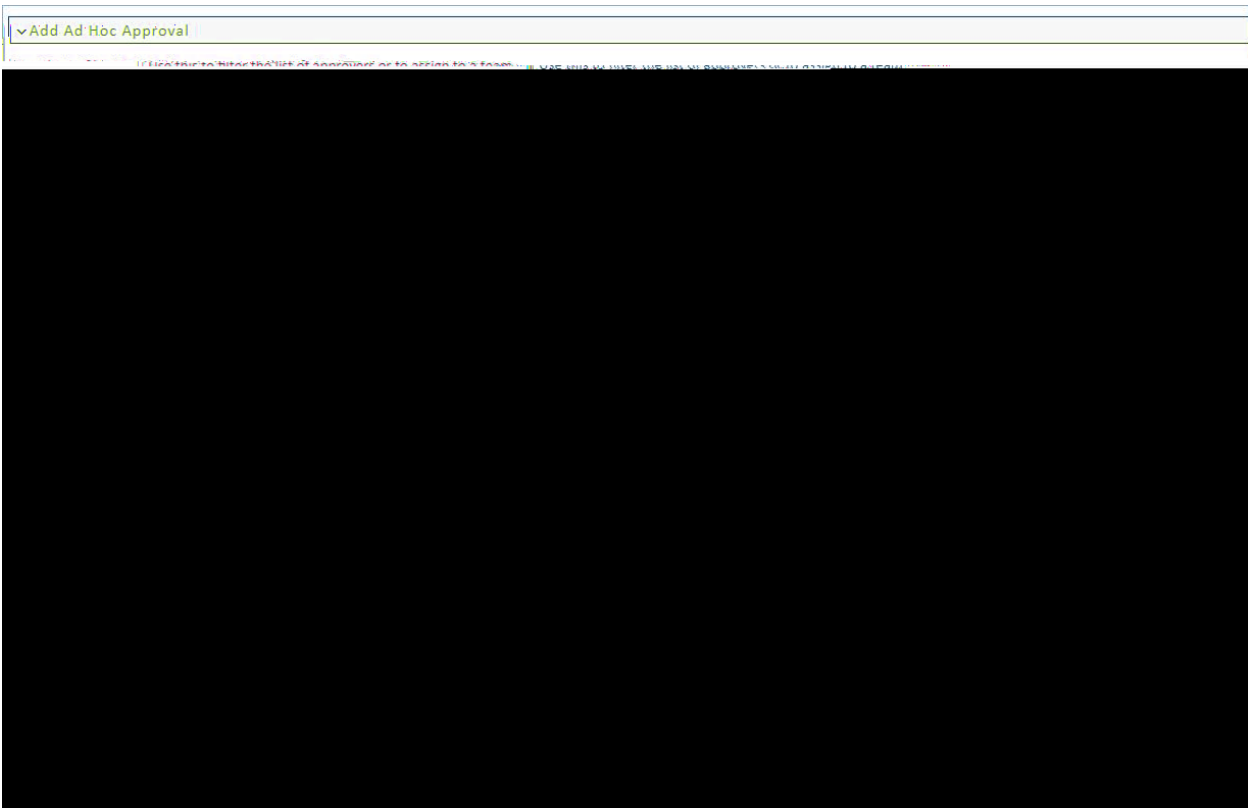
Approval Notes

The system requires that you enter Approval Notes if you are requiring changes. You can also use Approval Notes to explain anything you feel is useful or necessary or want to have on record.

Attachments

Any contract attachment records marked as being included in the Approval packet are listed here. You can click the Attached File name (in blue) to view the attachment, or if allowed, edit the attached document.

Reviewing Attachments



Add Ad Hoc Approver

If there is someone else who should approve the contract request and they are not listed in Concurrent Approvals or Next Approvals, you can add them in the Add Ad Hoc Approval section.

You can choose the Approval Team and/or the Approver. Select the Ad Hoc Approver Team; this will refresh the list of approvers on that team. Then optionally choose the Ad Hoc Approver. Click Add Ad Hoc Approval to create a new approval record in Pending Approval status at the same step as your approval.

Note: The approver you choose must have the appropriate permissions to be able to approve the record.

Concurrent Approvals

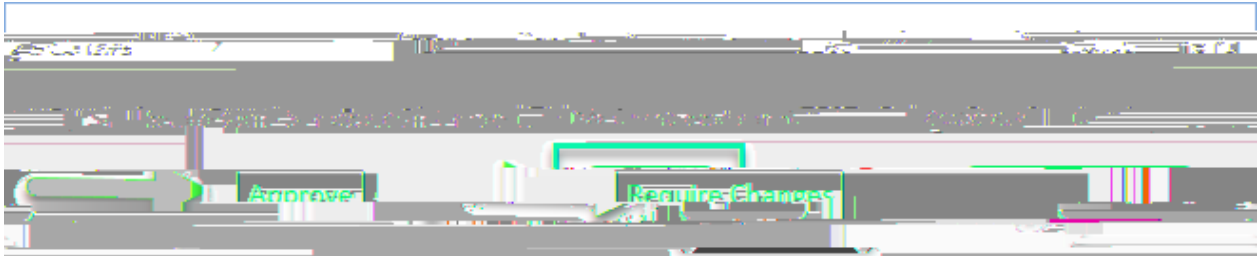
This related table shows all approvals for this contract request at the same step number as the current approval.

Next Approvals

This related table shows the approvals that are scheduled next in the workflow queue after the current approval.

Approve Pending Approval

To approve the request, click the Approve button at the top of the form:



Require Changes for a Pending Approval

If changes are required, add Approval Notes about what kind of change is required and then click Require Changes. This will change the Approval's status to "Requires Change," and notify the Contract Manager that a change is required.

