



InfoReady Quick Start Guide

Routing Steps

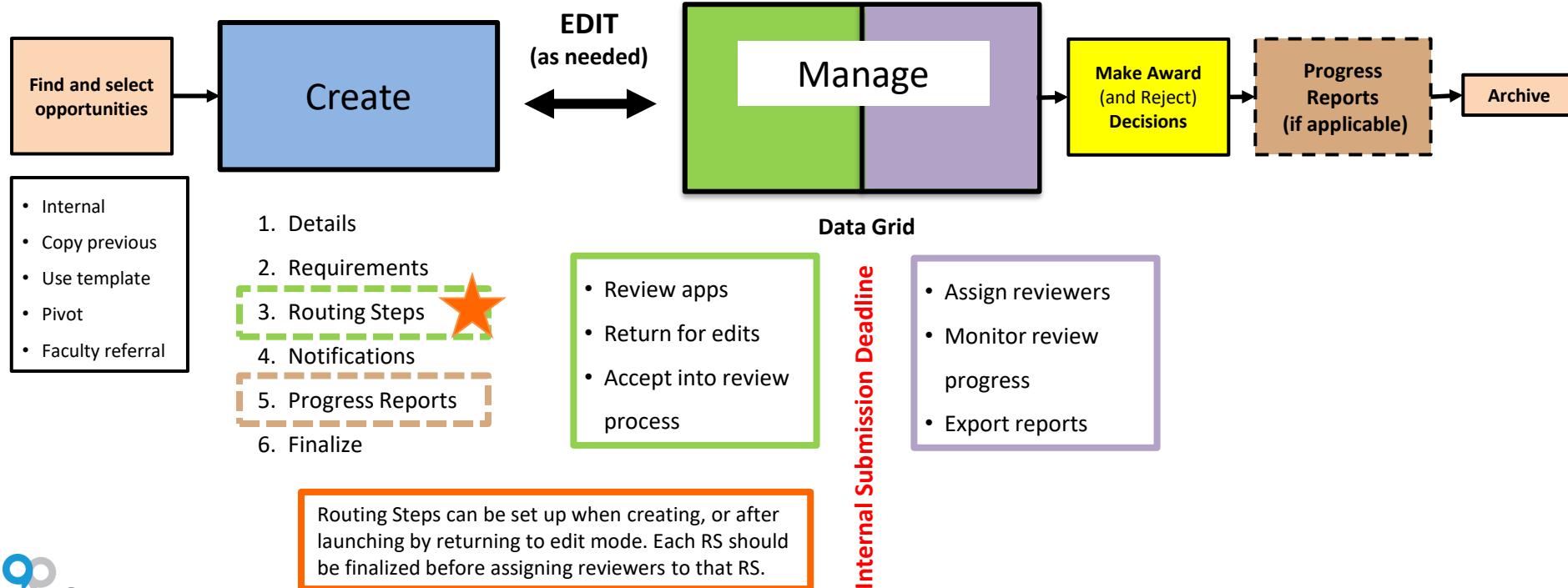
What are Routing Steps (RS)?

- Where you **order the workflow** for the review process
- Where you **build the form(s)** reviewers fill out
- Where you **design the reviewer experience**

What Routing Steps are NOT

- **NOT where you assign reviewers**
 - This comes later when managing the opportunity, after applications are accepted for review.
- **NOT necessary for launching**
 - If you want to start collecting apps right away, you can launch and add RS later (by returning to Edit mode from the Manage view).

The Life Cycle of an Opportunity



Determining how many RS you need

Keep these concepts in mind as you build the workflow for your review & approval process:

1. How many **rounds of reviews and approvals** will the opportunity require?
2. Multiple reviewers can be assigned to a routing step for a given application. Therefore, you do **not** need to have a separate routing step for each reviewer.
3. Multiple review criteria do **not** require multiple RS. You can include up to 20 criteria within one RS, each with its own rating scale and comment box (Comments & Ratings Combination).
4. Administrators always have access to all routing steps, so they do not need their own.
 - For example, if the first “step” you need is an Admin verifying correct application contents, this can be done with the *Accept* or *Return* actions within the Manage view and should **not** be a routing step.

What type of feedback do you need during each round?

This will determine your Routing Step Types

- *Comments and Ratings Combination*: Most common
 - # criteria = # questions, 4 *Comments and Ratings* provides four separate boxes with each question, instructions, and scale customizable
 - Both comments and ratings are required (must put something in box and select a number)
- *Approve/Do Not Approve* (or any other pair like *Support/Don't Support* or *Eligible/Ineligible*)
- *Document Upload*: Requires reviewer to upload a file of some type
- *Build my own Form*: mix and match question types with a form builder tool
- *Committee Approval/Committee Ranking*: Admin sends PDF of review packets and enters committee's consensus decision for each application
- If you need **different types of feedback for same review round**, create multiple RS and run concurrently (described later).

Ordering Routing Steps

Sequentially (Default)

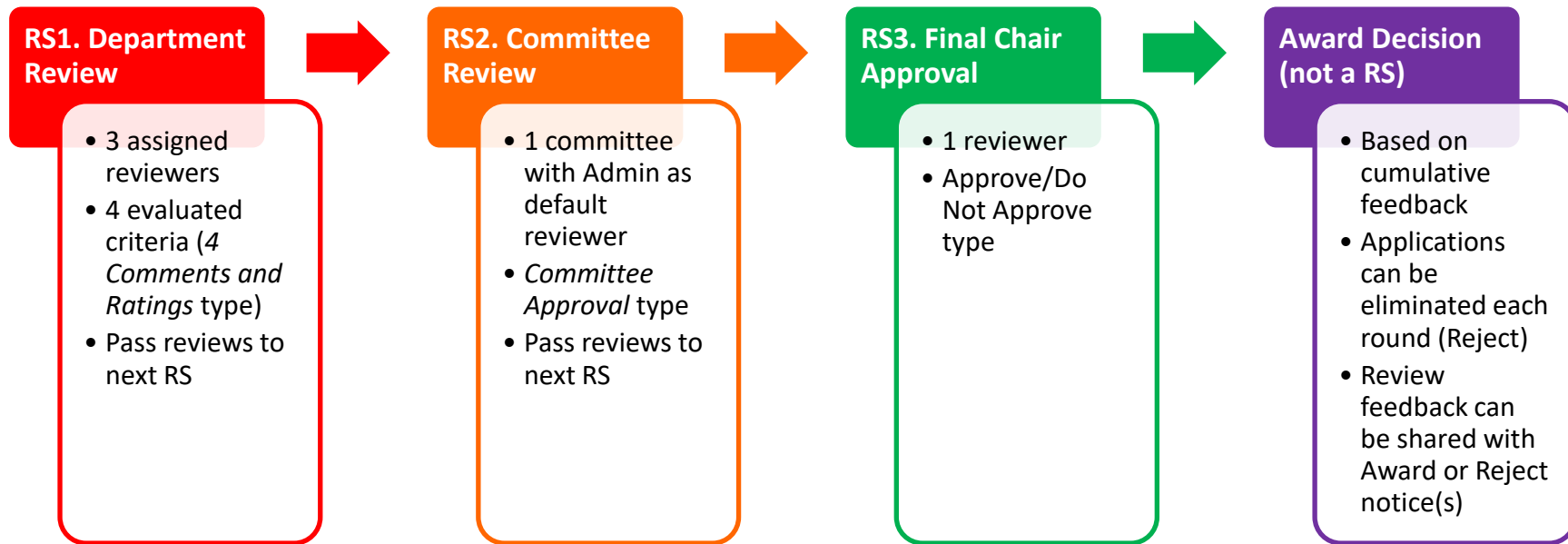
- Reviewers assigned to RS 2 will not be able to access reviews until reviews from RS 1 are complete.
- E.g., Department review → Committee review → Final Chair approval
- Admin can choose to pass on completed reviews to later RS

Concurrently

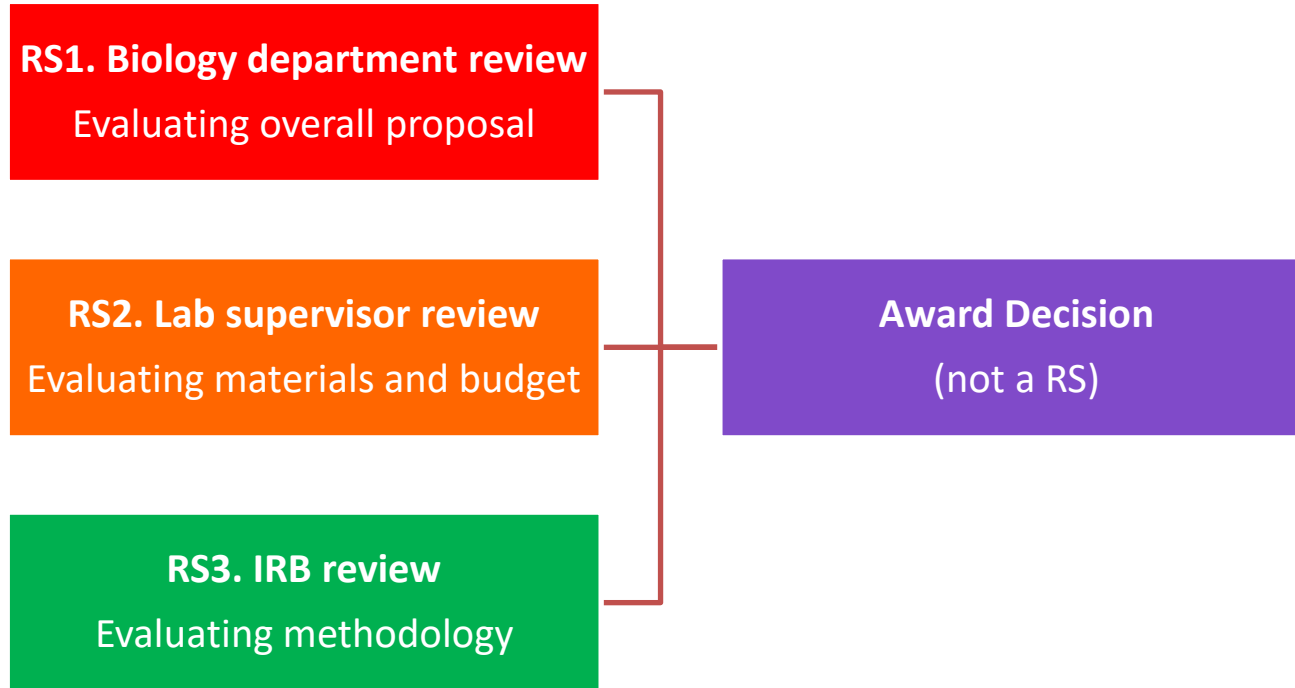
- Reviews from different RS can be completed at the same time.
- E.g., Biology department review ↔ Lab supervisor review ↔ IRB review
- Reviewers will not be able to see each other's reviews in any steps run concurrently

Sequential Routing Steps (Default)

Example sequential RS setup

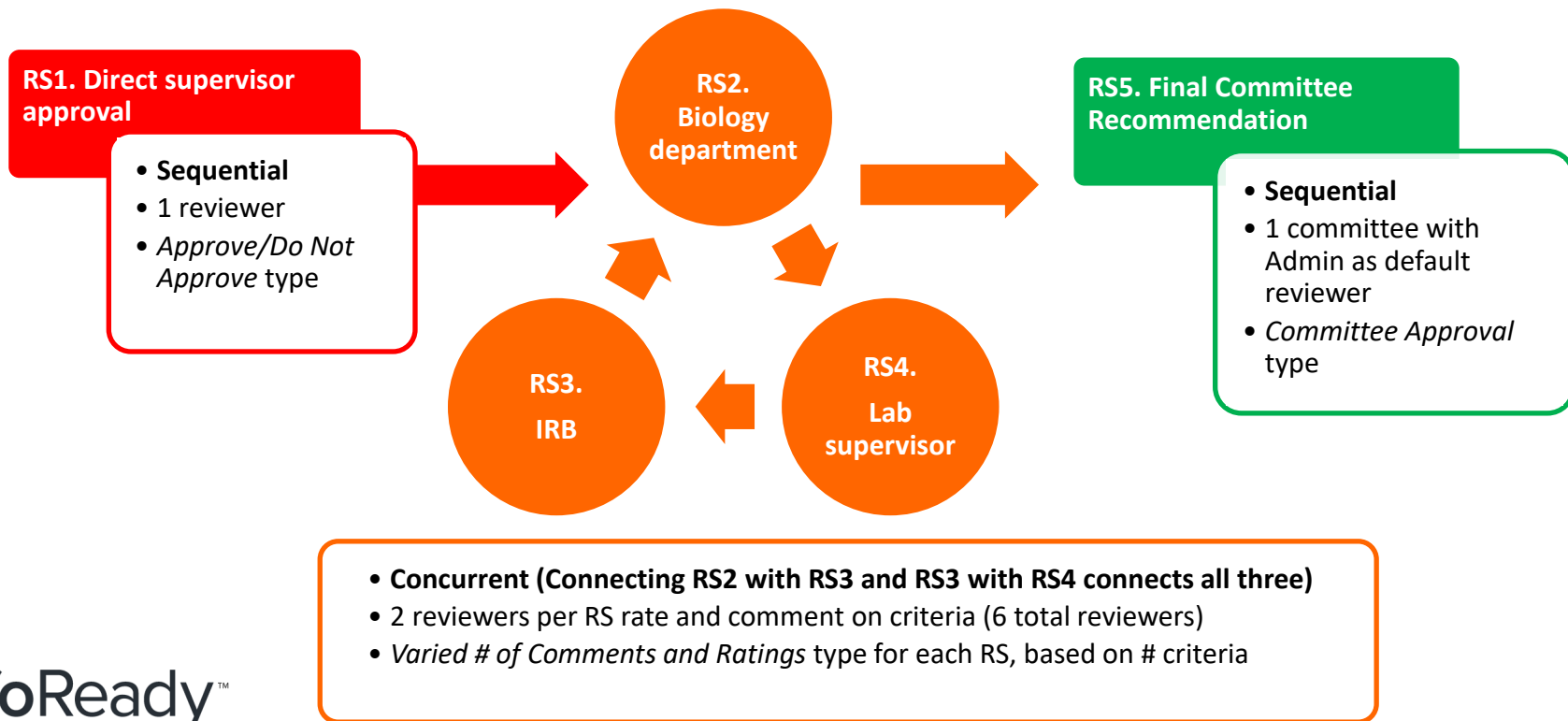


Concurrent Routing Steps



Example Concurrent RS Setup

Example of Combined Routing Steps



How do I make steps concurrent?

- From Create (or Edit) view
- Select after each RS
- Pairs with RS after it
- Cannot move a sequential RS between two concurrent RS
- *If combining concurrent and sequential steps, make sure last concurrent step does **not** have this box checked.*

Routing Step Options

- ☐ Reviewer(s) can see the identity of the applicant.
- ☐ Provide reviewers with access to all applications, not just the one(s) they are reviewing.
- ☐ Pass completed reviews from this Routing Step to reviewers in the next Routing Step.
- ☐ Runs Concurrently With Following Step ?

Routing Step Recap

- ☐ Upon routing step completion, email all completed reviews to all reviewers assigned to this step.
- ☐ Each reviewer may see the identities of the other reviewers.
- ☐ If there are previous routing steps, include those reviews as well.

Step 2 - Require Reviewer Acknowledgement?

You might want to require reviewers to agree to or acknowledge certain rules or realities. Use the

RS Do's and Don'ts

DO

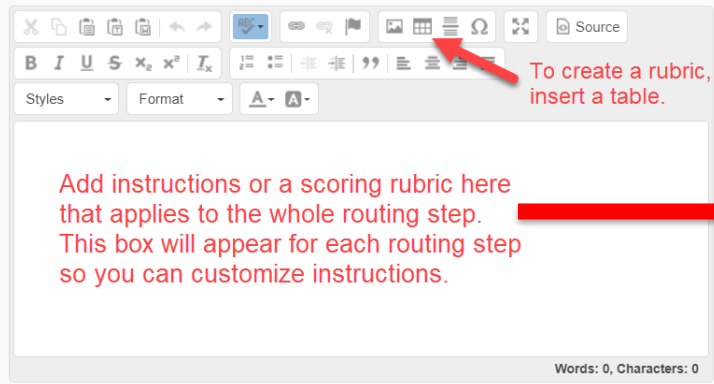
- Plan out your RS ahead of time
- Include clear instructions for reviewers *(example on next page)*
 - Rubric or ratings definitions
 - If files were included in apps, direct reviewers to lower right of screen
 - What to do if edits are needed after submitted review
- Use the simplest format to get the review data you need

Crafting Instructions

Routing Step Creation

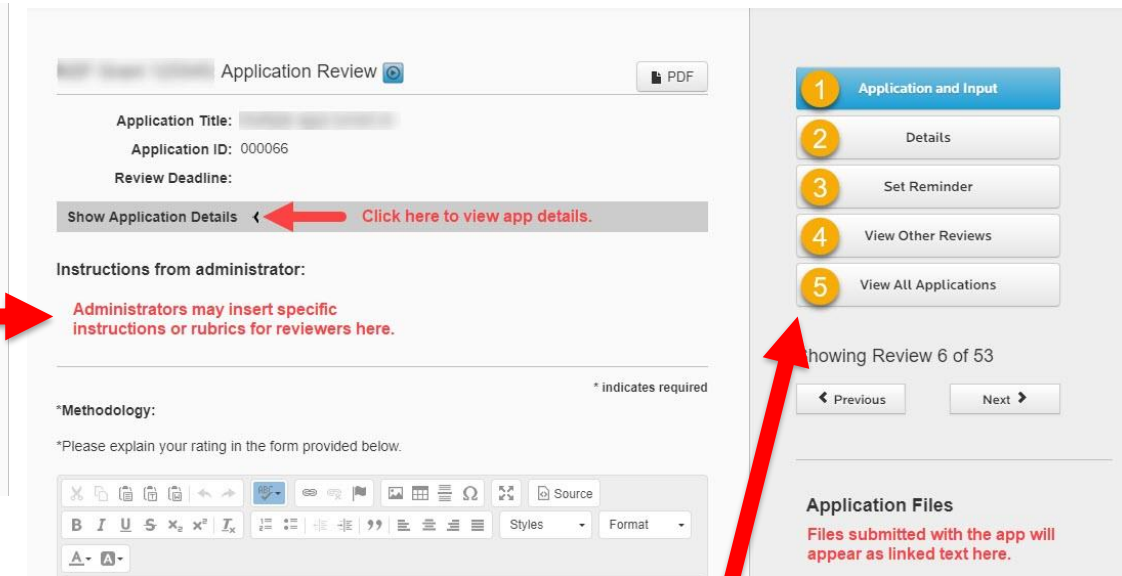
Reviewer Instructions

You might want to include instructions for reviewers, but it is not required. If you enter instructions, reviewers will see them at the top of the review form.



The screenshot shows a rich text editor for 'Reviewer Instructions'. It includes a toolbar with icons for undo, redo, bold, italic, underline, strikethrough, link, unlink, list, indent, and table. A red arrow points to the table icon with the text 'To create a rubric, insert a table.' Below the toolbar is a large text area with the instruction: 'Add instructions or a scoring rubric here that applies to the whole routing step. This box will appear for each routing step so you can customize instructions.' At the bottom right of the text area, it says 'Words: 0, Characters: 0'.

What Reviewer Will See



The screenshot shows the reviewer's application review form. At the top, it says 'Application Review' with a PDF icon. Below this are fields for 'Application Title', 'Application ID: 000066', and 'Review Deadline'. A button labeled 'Show Application Details' has a red arrow pointing to it with the text 'Click here to view app details.' Below this is a section titled 'Instructions from administrator:' with the text 'Administrators may insert specific instructions or rubrics for reviewers here.' At the bottom, there is a 'Methodology:' section with the instruction '*Please explain your rating in the form provided below.' and a note '* indicates required'. On the right side, there is a vertical navigation menu with five items: 1 Application and Input, 2 Details, 3 Set Reminder, 4 View Other Reviews, and 5 View All Applications. A red arrow points to item 5. Below the menu, it says 'Showing Review 6 of 53' with 'Previous' and 'Next' buttons. At the bottom, there is a section titled 'Application Files' with the text 'Files submitted with the app will appear as linked text here.'

- 1-3 are always visible.
- 4 and 5 determined by Admin under *Routing Step Options*

RS Do's and Don'ts

DON'T

- Don't create separate RS for Administrators. Admins always have access to all applications and reviews.
- Don't create separate RS for each criterion. You can include up to 20 criteria, each with its own rating scale and comments box, using *Comments and Ratings*
- Don't try to change a RS type (including adding to *Comments and Ratings*) after launching. Changing a question type will require re-entering all question info. You can still edit options in the RS, but not the RS type itself.
- Don't try to edit a multiple choice or multiple select question. Once choices are created, they cannot be edited (unlike the application form and progress reports)

FAQs

- **Can reviewers see all applications, not just those assigned to them?**
 - Yes, but only if Admin selects this option in Routing Step Options
- **Can reviewers see other reviews?**
 - Yes, but only if Admin enables Routing Step Recap for a given RS. Reviewers will receive a PDF for each application they reviewed that will include the other reviewers' comments.
 - SO, if your routing steps are concurrent, this option only shares reviews for a given RS.
- **Can I add routing steps after review process has started?**
 - Yes, but not before active or completed RS (i.e. can't add a "new" first RS).
 - Also, new sequential RS cannot be added between existing concurrent RS
- **Can I edit rating scales after launching?**
 - Yes. Ratings scales can be edited up to the point where reviewers have been assigned. The rating scales cannot be edited after reviews have been assigned.

More questions?

Visit the Support Portal by logging in to your site, hovering over *Help*, then clicking the “Administrators” link.

Contact support@inforeadycorp.com

