**Manage Ancillary Reviews**



**Work Instructions:**

**Add an Ancillary Reviewer**

1. Log into the Click Portal and click on the **Agreements** tab in the top navigation menu.
2. Click the **All Agreements** tab, and then click on the agreement’s **Name** to open it.
3. To request an ancillary review, click on **Manage Ancillary Reviews** under **My Current Actions**.

* Agreements Managers and/or Reviewers can request an ancillary review during the **Unassigned** and **In Review** states.

1. Click the **Add** button.
2. Click the **Select** button next to either **Organization** or **Person**.
3. Select an organization or person, and then click **OK**.

* *To remove a selected organization or person, click the* ***Clear*** *button*

1. Select a **Review** **type** from the list.
2. Determine whether or not a **Response** is required.

* *Any reviews marked as* ***Required*** *must be completed prior to approving the language of an agreement*

1. If you are finished adding reviewers, click the **OK** button. If you desire to add additional reviewers, click the **OK and Add Another** button, repeat steps 5-8, and then click the **OK** button.
2. You will be returned to the Agreements Workspace.

* *The list of all ancillary reviewers appears above the* ***History*** *tab in the Workspace*

**Remind Ancillary Reviewers**

1. Log into the Click Portal and click on the **Agreements** tab in the top navigation menu.
2. Click the **All Agreements** tab, and then click on the agreement’s **Name** to open it.
3. To remind an ancillary reviewer of their obligation, click on **Submit Ancillary Review Reminder** under **My Current Actions**.
4. Select the **Organization(s)** or **Person(s)** you wish to send a reminder to.
5. Type a **Message** and **Add** any **Supporting Documents**, if needed.
6. Click the **OK** button, and your reminder will be sent.

**Update an Ancillary Review**

1. Log into the Click Portal and click on the **Agreements** tab in the top navigation menu.
2. Click the **All Agreements** tab, and then click on the agreement’s **Name** to open it.
3. To update an ancillary review, click on **Manage Ancillary Reviews** under **My Current Actions**.
4. Click the **Update** button next to the **Organization** or **Person** you wish to update information for.
5. Complete the form, indicating if the reviewer accepted the submission and entering **Comments** as necessary. Then click **OK**.