**Track and Manage Reviews**



**Work Instructions:**

**Change Agreement State to Internal or External 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 shift the agreement between review states, click on **Move to Internal Review** or **Move to External Review** under **My Current Actions**.

* *Agreements Managers and/or Reviewers can change the agreement state at any point to reflect who is reviewing the agreement.*

**Find Agreements in Review**

1. Log into the Click Portal and click on the **Agreements** tab in the top navigation menu.
2. Click the **In Progress** tab.
3. On the **In Progress** tab, see the following columns:

* **Status** to find agreements in **Internal Review**, **External Review**, and **Ancillary Review**.
* **Modified Date** to see when action was last taken on the agreement.

*Use the* ***Filter by*** *option to show agreements in a certain status.*

1. Click on the **Name** of an agreement to open to the Agreements Workspace.
2. Click the **History** tab to review the last action taken on the agreement.

**Create and Update “To Do” Items**

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 create an action item or reminder, click on **Log Correspondence** under **My Current Actions**.
4. Enter a **Summary** description for the item.
5. To select an **Owner** for the item (you will be the default owner), click the **Select** button.

* Use the **Filter by** option to determine which search method you will use.
* Enter your search term in the box and click the **Go** button.
* **Select** the appropriate user.
* Click the **OK** button.

1. Repeat the actions in step 5 to select a **Person** to complete the item.
2. Complete the remaining items in the form and **Add** attachments, if needed.
3. Click **OK**.
4. The item will be added to the list on the **Communication** tab, and can be updated, marked complete, or deleted.

**Edit or Revise the Agreement**

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.

* To make changes to the agreement or SmartForm pages, click the **Edit Agreement** button.
* To upload a revised or final copy of the agreement document, click **Revise Agreement** under **My Current Actions**.