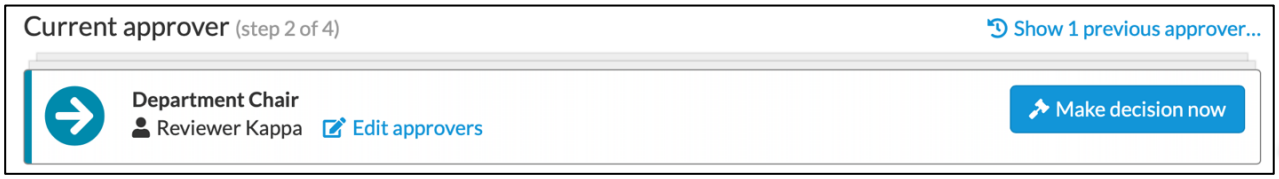
Request Changes Overview

Problem: During the approval process, approvers frequently ask the analyst to make changes before they approve. But the approval stays on the dashboard of the approver, so it is hard for them to know when the change has been made. Discussion of what changes are needed often happens outside the system and can be lost.

Solution: The "request changes" feature gives approvers a way to notify the analyst that changes are required, records the request in the approval history, and removes the approval from approvers' "to do" view. When the analyst resolves the change request, the approval returns to the approver's dashboard.



A

Opening a Change Request

On the approval step, there is now a single blue button, **"Make Decision Now"** (**A**)

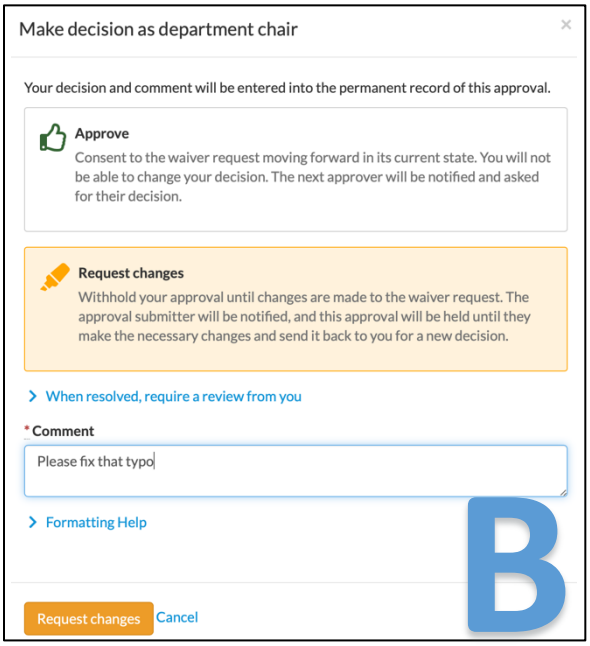
This opens a modal with options to either "Approve" or "Request changes" (**B**).

The "**Request changes**" decision allows the approver to send the approval back to the analyst, taking it off the approver's to-do list.

The approver specifies the changes they wish to see made in the comment field and **the analyst is notified via email**.

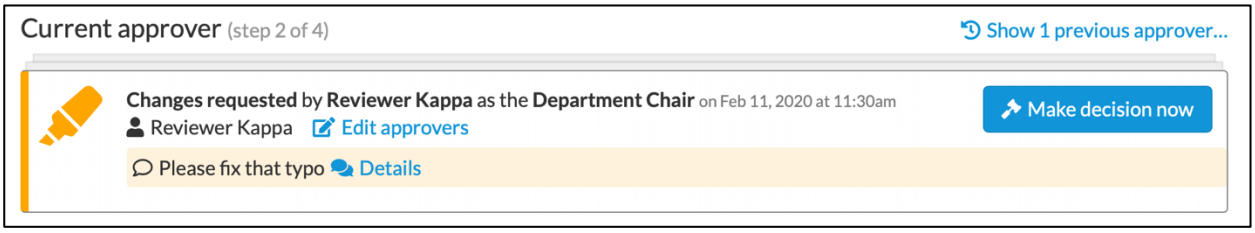
Anyone viewing the approval will be able to see that a change request is currently open (**C**) and follow along by clicking on "**Details**".

This will dissuade upcoming approvers from approving early for something that may still change.



B

C



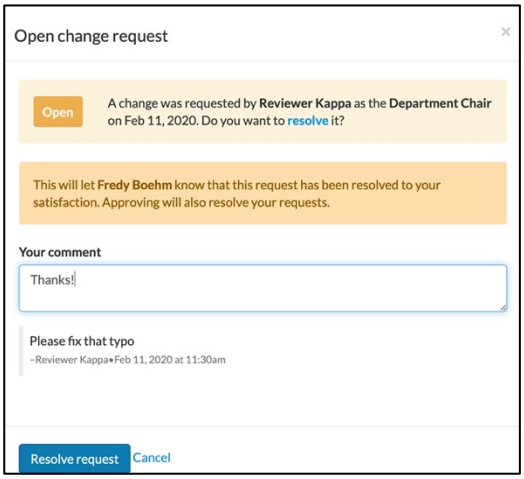
Resolving a Change Request

When the analyst is done with the changes (or if it is decided that the changes will not be made), the **analyst can resolve the change request.**

The approver who requested the change will be notified via email and the approval will return to their dashboard in Recruit. They can then return and **make a new decision**, to approve or request further changes.

The person who opened the change request can also **resolve the request themselves** within the "Details" modal (**D**).

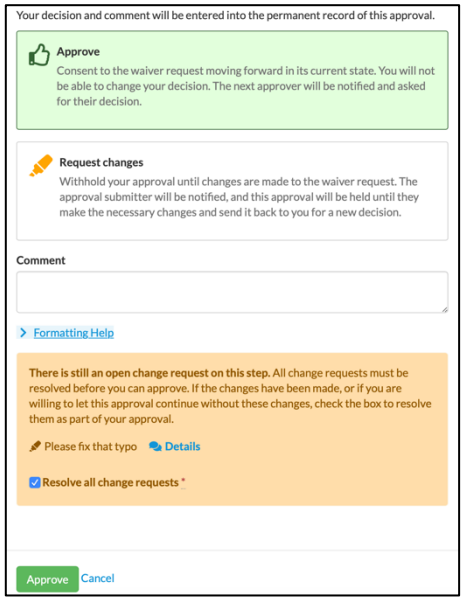
D



Change requests can also be **resolved by approvers as part of the approval process**.

If the approver selects **“Approve” within the “Make Decision Now”** modal, and an open change request exists on that step, a yellow highlighted box will open up displaying information about the change request (**E**).

The approver can check a box to **“resolve all change requests”** at the same time as approving the step.



E

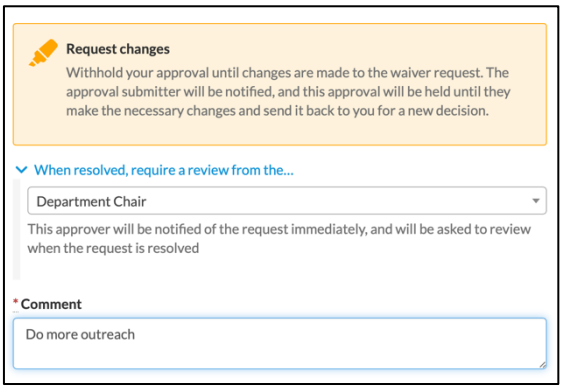
Resolved change requests and their comment threads can still be seen on the associated approval step (**F**). Prior to approving the step, the request can be reopened if the approver does not feel their concerns were addressed.

F

Request a Change to be Reviewed by a Previous Step

Approvers can also request a change **to be reviewed by a previous step**, if they determine that the approval should not have come to them in its current state.

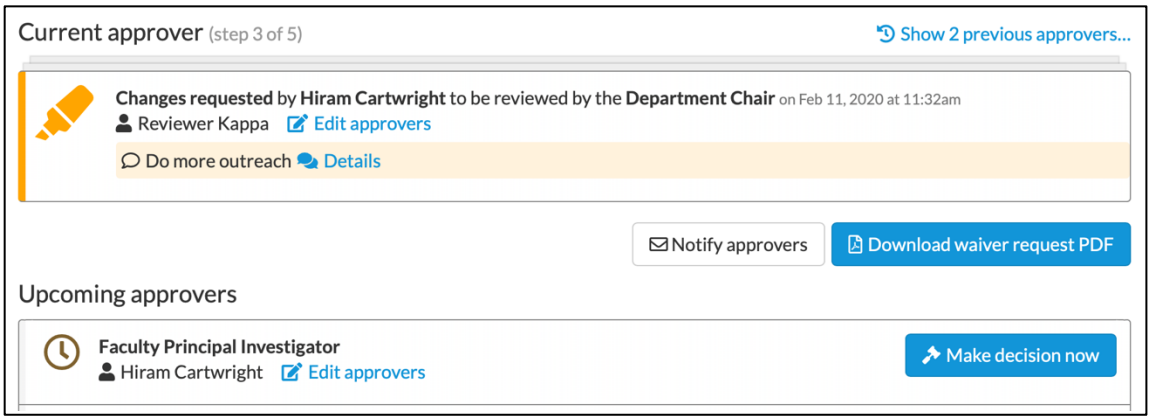
Within the “Make Decision Now” model, the **“When resolved, require a review from the…”** pull down menu allows the requester to select a previous approver (**G**).



G

When a change is requested this way, **a new step is created** for the selected approver, with an open change request already present (**H**).

Here, a request was made by Hiram Cartwright, the FPI and approver in the upcoming step, to be reviewed by the Department Chair, Reviewer Kappa. Once the change is made & Reviewer Kappa approves it, the approval will move back onto Hiram Cartwright’s desk.



H