Assign a Full-board Submission to a Reviewer(s) and Add to Board Agenda

Before this process, a submission was scheduled for a full board review. See the instructions for *Determine if a submission needs a full board review*. After this process, the submission will be sent to a board member(s) for their review before the meeting.

1. To begin, you should be inside the PPHS's MICRO task for the submission. The **Review Dashboard** tab should be displayed. You should expand the row for the **Meeting Review**. You can see the Review Type is set to Meeting Review, the Review Process is set to Full Committee Review, a Board has been selected, and a Meeting Date has been selected.
2. Click the **Add Reviewer** button. A popup window appears with the members of this Board listed.
3. Select the Board Member(s) who will review this submission and present it at the meeting. Then, click the **Add Selected Members** link.

You should choose from among the Board Members listed in this window. If the Board member that you need is not listed in this window, then the member either needs to be added to the Board or their appointment expired. Ask the system administrator to create a new appointment; do not change the end date of their current appointment.

If you need to add someone who is not on the board as a Reviewer for this submission, use the Add Consultants feature.

4. The person(s) selected will be added to the list of **Reviewer(s)**.
5. If you need to add a Reviewer who is not on the Board, because they have specific expertise, click the **Add Consultants** button. As before, a popup window will appear where you can choose from a list of people. In that window, you will probably need to use the **Lookup** field to find the person whom you want to add.

   After finding and adding the consultant, click **Add Selected Members** and the consultant will be added to the list of **Reviewer(s)**.
6. Next to each Reviewer, click the **Send** button. This puts a task on the Reviewer's To Do List, telling the Reviewer to review this submission.

The Reviewer's task is covered in a separate set of instructions.

REMEMBER TO CLICK **SEND**. IF YOU DON'T CLICK THE **SEND** BUTTON, THE REVIEWER(S) WILL NEVER SEE THIS ON THEIR TODO LIST.

7. Scroll down to the section labeled **Agenda Information**, where you will see text fields labeled **Submission Overview** and **Agenda Comments**. The contents of these fields will appear on the meeting agenda that is sent to board members. Entering information here is optional.
8. **Submission Overview** appears on the agenda under the **Lay Summary**. Enter any appropriate information into this field.
9. **Agenda Comments** appears on the agenda as **Agenda Comments**. Enter any appropriate information into this field.

10. At this point, stay away from the **Meeting Information** section. This will get populated *after* the meeting, not now.

CHECK: DID YOU SEND TO THE INDIVIDUAL REVIEWERS FIRST? DON'T LEAVE THIS SCREEN UNTIL YOU'VE SENT TO INDIVIDUAL REVIEWERS.

11. Do not click the **Send to Board** button. You will do that after the board members have reviewed the submission and submitted their motions .

The Board members have not yet received an agenda. At this point, the Analyst is not actually sending anything to the Board Members; (s)he is preparing this submission to be sent with the Agenda.

12. The MICRO task remains on your To Do List. Beneath the MICRO task will appear the text **Reviews Assigned**.
13. At this point, you must now wait for the board member(s) to complete their review. When they have completed their review, the MICRO task will appear with the text **Reviews Complete**.
14. After the board members have completed their review, click into the MICRO task. You will see a notice in the left column reading **Member reviews are complete…**
15. Select the **Review Dashboard** tab. Find the row for the **Meeting Review**.
16. Expand the **Meeting Review** tab.
17. The reviewer(s) to whom you sent this submission are listed in this row. Check to ensure that they have completed their review.
18. Click the **Send to Board** button. This puts the submission on the agenda for the selected board and meeting date.