iPortal Approver Training Guide for Departments & Colleges

iPortal Online Document Request System

WHAT IS THE iPORTAL?

The International Students & Programs Office (ISPO) uses the iPortal online request system to intake student requests replacing paper-based forms. Various requests within the iPortal require prior approval from the student’s department or college to ensure validity of academic requirements prior to ensuring eligibility for immigration benefits. The iPortal accommodates this need by routing certain requests to colleges and departments for electronic review and approval.

PRIMARY APPROVER AND SUB-APPROVER DESIGNATION & RESPONSIBILITIES

Colleges and departments will be assigned a minimum of one primary approver who will have access to all request. Primary approvers can add sub-approvers, or other staff within their units, to assist in approving these routed requests. Only primary approvers can add sub-approvers within the iPortal. Each unit will receive emails when students submit requests that are immediately routed to them for approval. Approvers should review validity of academic information that students have submitted within their applications. To stay within normal processing times for student requests, ISPO asks all approvers to review and process requests within 3 business days.

SETTING UP APPROVERS IN iPORTAL

- **STEP 1.** Request Primary Approvers
- **STEP 2.** Managing Sub-Approvers
- **STEP 3.** Adding New Sub-Approvers
- **STEP 4.** Activating Sub-Approvers
- **STEP 5.** Saving New Sub-Approvers

ACCESSING STUDENT REQUESTS: PRIMARY APPROVER AND SUB-APPROVER VIEW

- **STEP 1.** Accessing Student Requests
- **STEP 2.** Reviewing Pending Requests
- **STEP 3.** Approving or Denying Student Requests
- **STEP 4.** Accessing Reviewed Requests

FREQUENTLY ASKED QUESTIONS (FAQs)

- What are the differences between Primary and Sub-Approvers?
- How do the email notifications work in iPortal and does adding approvers change that?
- How can I access student requests?
- What should approvers do if they need to change a decision on an application after it’s already been reviewed?
- How quickly should I be approving these requests? Are they time sensitive?
- Who should I contact if I am experiencing technical difficulties?
SETTING UP APPROVERS IN IPORTAL

STEP 1: Requesting Primary Approvers
Notify ISPO at iPortal@ucsd.edu of your Primary Approver(s). Units must have a minimum of one (and a maximum of two) Primary Approver(s) listed within iPortal. Once ISPO receives the full name and email address of the Primary Approver(s), these individuals will be added as Primary Approvers in iPortal. Once Primary Approvers are added, they can add up to 15 Sub-approvers. Note adding sub-approvers is not required if the sole responsibility for reviewing requests lies with the Primary Approver. When an Approver logs into iPortal.ucsd.edu they will see:

STEP 2: Managing Sub-Approvers
Sub-approvers are not required if the sole responsibility for reviewing requests lies with the Primary Approver. To add or edit Sub-approvers, the Primary Approver can click on ‘Manage Sub-Approvers’. This would take them to a list of any current Sub-Approvers to edit or the button that says ‘Create Sub-Approver’ to add a new Sub-Approver.
STEP 3: Adding New Sub-Approvers
When a Primary Approver creates a Sub-Approver they must:

➢ Add the first name, last name, and email address for each sub-approver
➢ Select at least one degree type to each Sub-approver. This will dictate which student requests that Sub-approver will be able to view.

*Please note it will only ask primary approvers to select a department/college if you are a Primary Approver for more than one department/college. Otherwise it will default to your department/college. Any sub-approvers added will be associated to the Primary Approver’s department/college unless they are a Primary Approver for more than one (in which case they would need to choose a department/college in the drop-down).

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Manage Users

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STEP 4: Making Sub-Approvers Active
Make sure “Active” stays checked by default. If in the future a Sub-Approver needs to temporarily or permanently be removed, the Primary Approver can uncheck this box.

☐ Active

STEP 5: Saving New Sub-Approvers
When you have entered all the required information and are ready to save, press Save.
ACCESSING STUDENT REQUESTS

STEP 1: Accessing Student Requests
Under Student Requests, there are two view options:

➢ **Pending Requests**: Lists requests that have not been processed (approved or denied).
➢ **Reviewed Requests**: Lists student requests that the department/college has already reviewed and processed (approved or denied).

In each view, approvers can filter by any of the bolded columns at the top (request type, request date, degree, etc.)

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**STEP 2: Processing Pending Requests**
For each request in Pending Request, approvers will click on ‘process’ to review the request and approve or deny.

*See FAQ: What should approvers do if they need to change a decision on an application after it’s already been reviewed?*

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**STEP 3: Approving or Denying Student Requests**
If an approver intends to deny a request, comments must be added for reason of denial. These comments are viewable by both the student and the International Students & Programs Office.

**Comments**
Comments are viewable by all users, including students. A comment is required if the request is denied.

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STEP 4: Accessing Reviewed Requests

Once an advisor processes a request, it will disappear from Pending Requests and appear in the Reviewed Requests. When approvers click on Reviewed Requests, they should see:

![Reviewed Requests Table]

Proceed to next page once you've reviewed these steps ➔
FREQUENTLY ASKED QUESTIONS

➢ What are the differences between Primary and Sub-approvers?
Sub-approvers are not able to add other approvers. Primary Approvers will see ALL student request (all degree types/levels: Bachelor’s, Masters, PhD). Sub-approvers can only see degree levels the Primary Approver assigns them. However, if the Primary Approver assigns all levels to the sub approver, then the sub approver may have the same view as the Primary Approver.

➢ How do the email notifications work in iPortal and does adding approvers change that?
Once a student submits a request that requires routing approval, iPortal generates an email to the appropriate email address provided to ISPO by department/college containing a unique link to access a student’s request. Each department/college has already notified ISPO of email address(es) linked to respective iPortal request types for PhD, Master, and Undergraduate students. Note that email notifications are assigned to one email address per degree level for each request type. The email address on file can be different or the same for all degree levels. To change particular email addresses these email notifications are sent to, please email iPortal@ucsd.edu.

➢ How can I access student requests?
There are two ways to access student request:
1. Click on Link in Email: Each student request generates an email to the appropriate email provided to ISPO by department and that email contains a unique link to access a student’s request.
2. Log into iPortal as a Primary or Sub-Approver: Once added as an Approver in iPortal, Approvers will be able to log into iPortal to see a list of Pending Requests.

➢ What should approvers do if they need to change a decision on an application after it’s already been reviewed?
Once Approvers have made processed a request (approved or denied), the decision cannot be changed. Please email iPortal@ucsd.edu if you need to change a decision on a processed request.

➢ How quickly should I be approving these requests? Are they time sensitive?
To stay within normal processing times for student requests, ISPO asks all approvers to review and process requests within 3 business days. ISPO will encourage students to follow up directly with their college/department for pending requests beyond 3 business days.

➢ Who should I contact if I am experiencing technical difficulties?
Please contact iPortal@ucsd.edu with any technical iPortal issues. Include a description of the issue, student PID and name (if applicable), and a screen shot.