(858) 534-3730
iContact.ucsd.edu
iStudents.ucsd.edu

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

ACCESSING STUDENT REQUESTS: PRIMARY APPROVER AND SUB-APPROVER VIEW

FREQUENTLY ASKED QUESTIONS (FAQs)

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:

IPORTAL

Student Requests ⚙

Manage Sub-Approvers

Pending Requests

Show 25 entries   Search:

	PID	First Name	Last Name	Status	RequestType	Request Date	Degree	Academic Level	Dept	RoutedTo
☑ Process	███████			Submitted for Graduate Coordinator Approval	RCL Graduate	03/11/2020	MS	GR	ECE	ECE
☑ Process	███████			Submitted for Graduate Coordinator Approval	RCL Undergraduate	04/15/2020	MS	GR	ECE	ECE

Showing 1 to 2 of 2 entries   First   Previous   1   Next   Last

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:

Manage Sub-Approvers ➕ Create Sub-Approver

Click on the "+Create Sub-Approver" button to add a new Sub-Approver. You may have up to 15 approvers within your department.

Each department or college is limited to a maximum of two Primary Approvers. Only Primary Approvers can add Sub-Approvers. Contact the International Students & Programs Office at iportal@ucsd.edu if you would like to change your Primary Approvers.

First Name   **Last Name**   **Email Address**

🔍 Search

							Active

Copy CSV Excel Print   Search:

	User	Role	Email	Department	College	AcademicLevel	Active
☑ Edit	████	SubApprover	████	ECE		Bachelors	true
☑ Edit	████	SubApprover	████	ECE		Masters	true
☑ Edit	████	SubApprover	████	EDS		Bachelors,Masters,PHD	true
☑ Edit	████	SubApprover	████	ECE		Bachelors,PHD	true

Showing 1 to 4 of 4 entries

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 <u>at least one</u> 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 <u>more than one department/college</u>. 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).

Manage Users

First Name   Last Name   Email Address

Select the degree types that this Sub-Approver should view:
☐ Bachelors
☐ Masters
☐ PHD

☑ Active

Selected Department: Electrical & Computer Engineering

⊘ Cancel   💾 Save

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.**

⊘ Cancel   💾 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.)

Student Requests
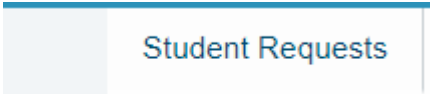
STEP 2: Processing Pending Requests

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?

| Student Requests | ⚙ |

Pending Requests

Show 25 ▾ entries   Search: [   ]

	PID	First Name	Last Name	Status	RequestType	Request Date	Degree	Academic Level	Dept	RoutedTo
Process				Submitted for Graduate Coordinator Approval	RCL Graduate	04/15/2020	MF	GR	RSM	RSM
Process				Submitted for Graduate Coordinator Approval	RCL Graduate	04/16/2020	MS	GR	RSM	RSM

Showing 1 to 2 of 2 entries   First   Previous   1   Next   Last

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.

💾 Save Comment

[   ]

🗹 Deny   ➔ Approve

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:

Student Requests	⚙

Reviewed Requests

Show 25 ▾ entries   Search: [   ]

	PID	First Name	Last Name	Status	Request Type	Request Date	Approval Date	Approver Email	Degree	Dept	Routed To
👁 View				Denied by International Student Advisor	RCL Undergraduate	04/15/2020	04/16/2020	basena@eng.ucsd.edu	MS	ECE	ECE
👁 View				Approved by Department	RCL Graduate	03/11/2020	04/16/2020	basena@eng.ucsd.edu	MS	ECE	ECE

Showing 1 to 2 of 2 entries   First   Previous   1   Next   Last

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 college/department 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. <u>Click on Link in Email</u>: 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. <u>Log into iPortal as a Primary or Sub-Approver</u>: 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.