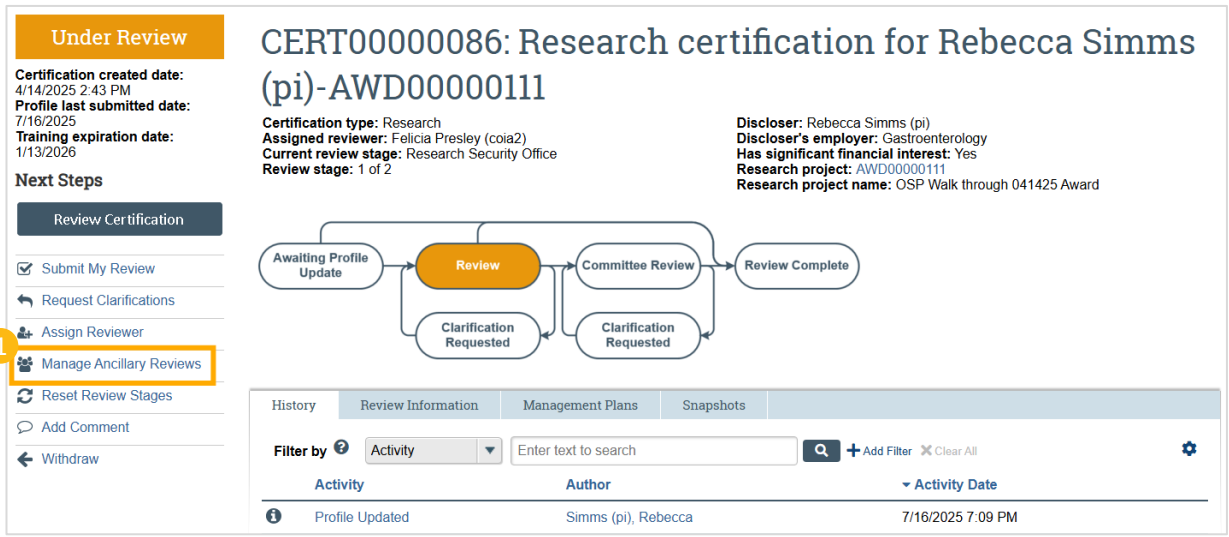
Manage Ancillary Reviews

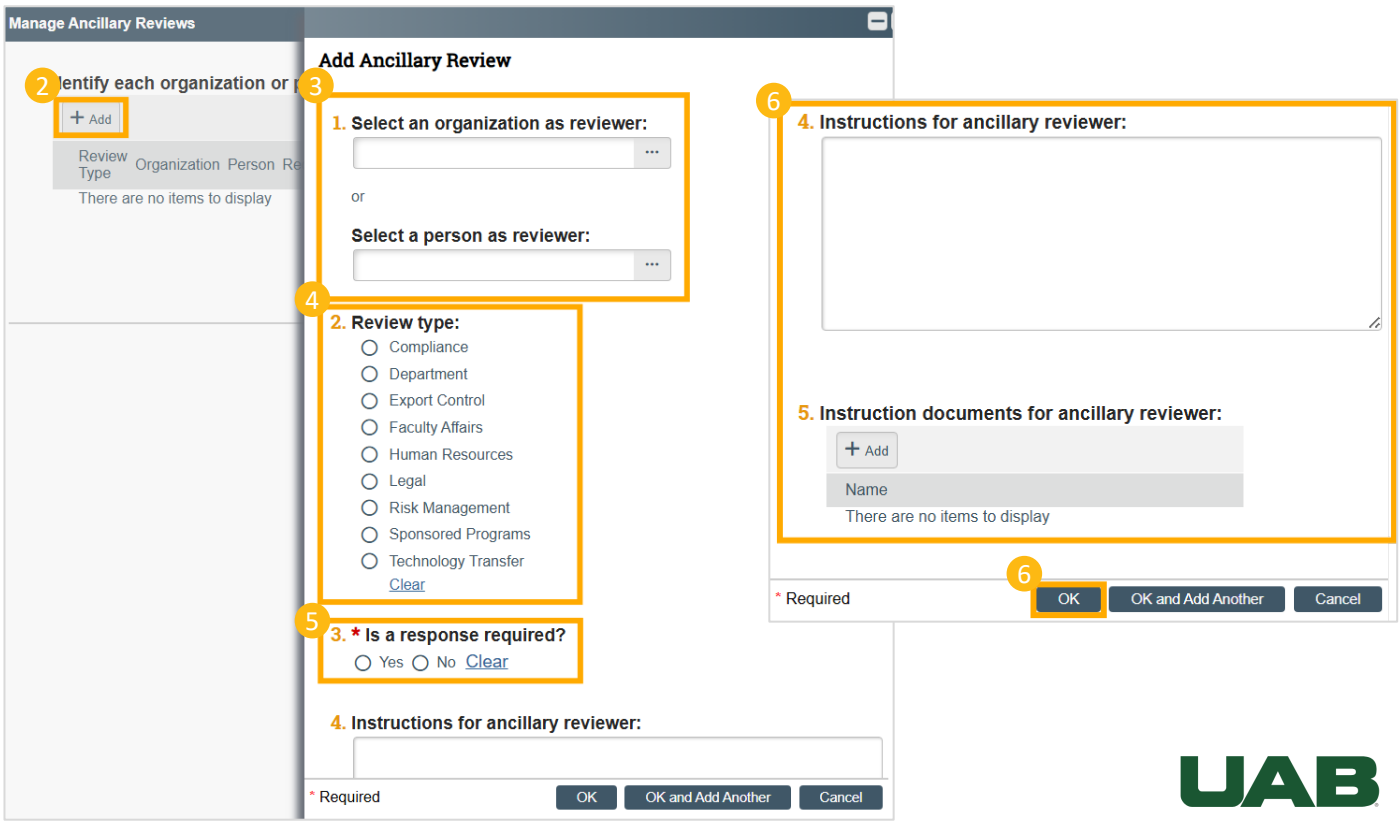
An ancillary review allows an individual, department, or other organization to give feedback on certification, management plans, retrospective reviews, and pre-approval requests that run in parallel with the COI review. This guide will show you how to set up an ancillary review. Any COI staff member can initiate an ancillary review.

Set Up an Ancillary Review

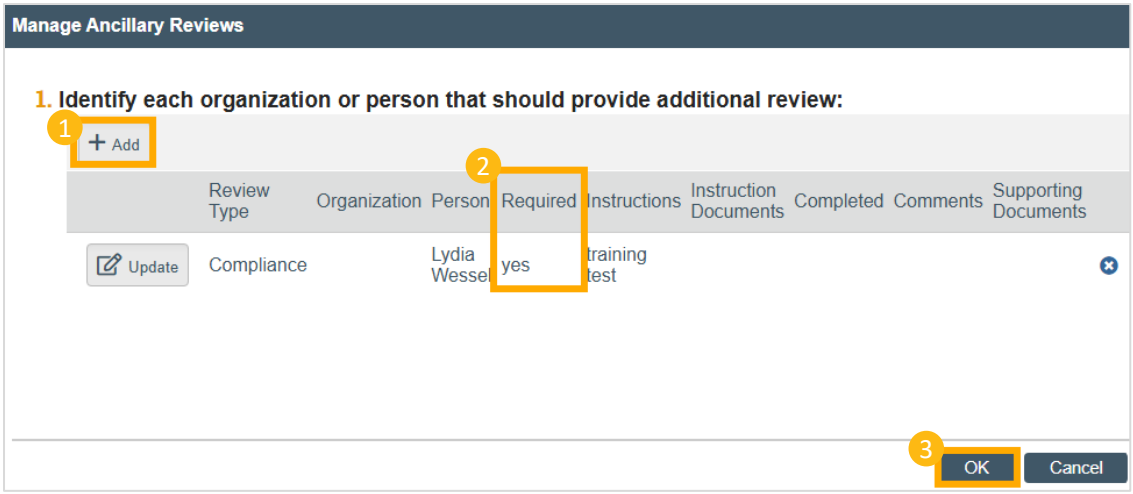
1. **From the certification workspace, click Manage Ancillary Reviews. The Manage Ancillary Reviews page will appear.**



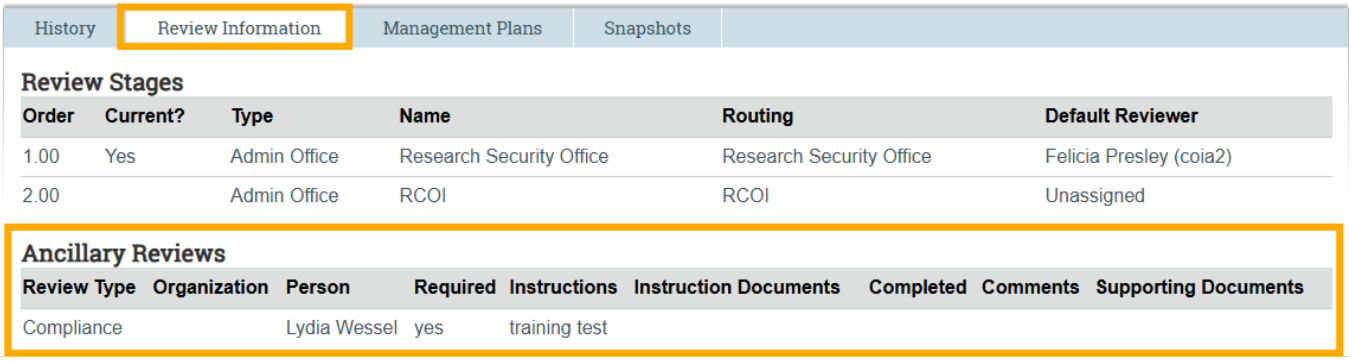
2. **Identify each organization or person that should provide additional review (e.g. compliance or legal) by clicking Add.**
3. **Select either the organization or person that should provide additional review.**
4. **Select the review type.**
5. **Answer the question, "Is a response required?". Note: answering yes will block the workflow if it is not completed.**
6. **Add instructions for the ancillary reviewer and instruction documents. The information supplied here will be provided to guide the reviewer on what they are supposed to review. Click OK.**



7. **You are now returned to the Manage Ancillary Reviews page. The manage ancillary review information is reported here. The required column indicated whether completion is required for the workflow to move forward. Add more reviews if needed or click OK to return to the certification workspace.**



8. **In the certification workspace, the ancillary review you just set up can be found under the Review Information tab.**



9. **The reviewer will receive a notification that an ancillary review was assigned to them.**