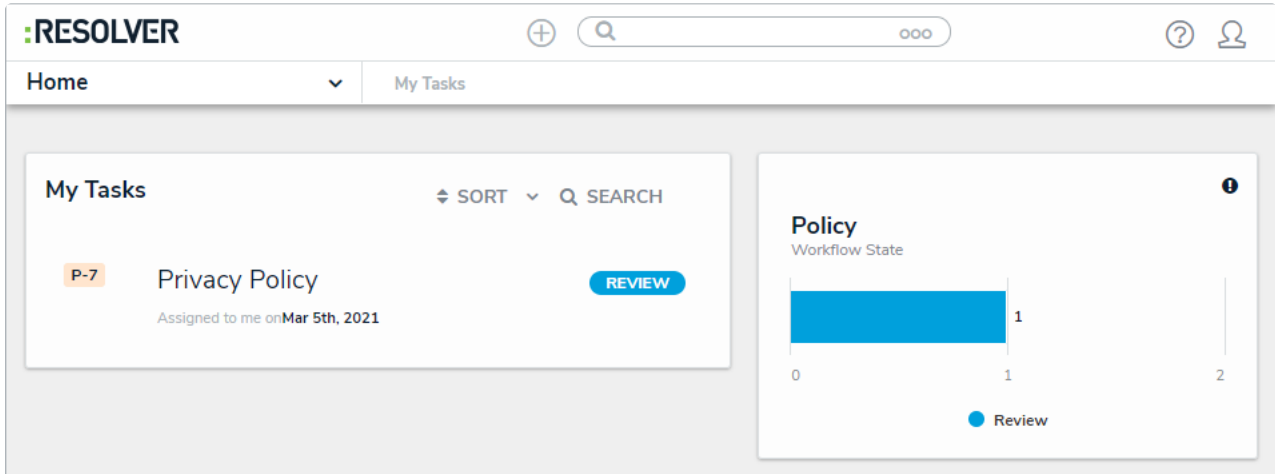


Review a Policy

Last Modified on 04/05/2023 5:14 pm EDT

Once the Policy Owner has [updated a policy](#), it moves to the **Review** state and is assigned to a member of the **Risk Team** user group. Once the policy has been reviewed, it can either be archived or sent back to the Policy Owner for the next review cycle. All policies in need of review will appear on the [My Tasks](#) page.



A policy assigned to the Policy Reviewer on the My Tasks page.

To review a policy:

1. Log into a user from the **Risk Team** user group to display the **My Tasks** page.
2. Click a Policy in the **Review** state to open the **Policy Review** form.

The screenshot shows the 'Privacy Policy' review form. At the top, the title 'Privacy Policy' is displayed in large black font. To its right, there are two status indicators: 'P-8' in a light orange circle and 'ACTIVE' in a blue circle, followed by a three-dot menu icon. Below the title is a navigation bar with three tabs: 'Details' (which is selected and highlighted with a blue underline), 'Relationship Graph', and 'History'. The main content area contains a paragraph of instructions: 'Review details of this policy in the sections below. If applicable, add commentary regarding any updates made to the policy in the "Policy Reviewer Comments" field.' To the right of this text is a dark blue button with a white printer icon and the text 'PRINT', and below it, another dark blue button with a white document icon and the text '/ EXPORT'. Below this is a section titled 'Policy Details'. It contains four input fields: 'Policy Name' with the text 'Privacy Policy'; 'Description' with the text 'The policies and procedures that all employees are legally obligated to follow to protect customers' personal information.'; 'Business Unit' with a search icon, the text 'Corporate', and a close icon; and 'Version' with the text '1'. At the bottom, there are two more fields: 'Policy Owner' and 'Policy Reviewer', both with search icons and blurred text, and a small blue information icon to the right of each label.

The Policy Review form.

3. In the **Policy Details** section:

- a. Edit the name and description in the **Policy Name** and **Description** fields.
- b. Begin typing keywords in the **Business Unit** field, then click to select the relevant unit.
- c. Edit the policy version number in the **Version** field.
- d. Remove or add additional users to the **Policy Owner** and **Policy Reviewer** fields as needed.
- e. Select new review and due dates in the **Next Review Date** and **Due Date** fields.

4. **Optional:** In the **Policy Narrative** section:

- a. Drag files to the **Supporting Attachments section** or click in the boxes below it to browse for files/enter a web link. If you do not attach any supporting documents,

paste the policy's body text in the **Policy Narrative** field.

Policy Narrative

Supporting Attachments

Drag files here or click to select...

_____ or _____

Click to add a web link to a file...

Policy Narrative

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The Policy Narrative section.



It is best practice for the Policy Owner to edit this section. The Policy Reviewer only has access for when they have additional changes to make on the already completed work.

5. In the **Review Comments** section, enter any comments you have about the policy in the **Policy Reviewer Comments** section.

Review Comments ☰

Policy Owner Comments

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Policy Reviewer Comments

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