

Review a Policy

Last Modified on 05/19/2022 3:31 pm EDT

Once the Policy Owner has updated a Policy, it is then moved to the **Review** state and assigned to a **Compliance Team** user group member. 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.

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Home ~ My Tasks			
My Tasks \Rightarrow SC P-7 Privacy Policy Assigned to me on Mar 5th, 2021	DRT ~ Q SEARCH REVIEW	Policy Workflow State 0 1 0 Review	9 2

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

To review a policy:

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



tails Relationship Graph History 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. Lot PRINT / EXPORT Policy Details Policy Name Daily or Weekly Trial Balances Description Using a double-entry accounting system adds reliability by ensuring that the books are always balanced. Even so, it is still possible for errors to bring a double-entry system out of balance at any given time. Calculating daily or weekly trial balances can provide regular insight into the state of the system, allowing you to discover and investigate discrepancies as early as possible. Business Unit Q Corporate × Policy Owner	aily	or Weekly Trial Ba	ances	P-5 REVIEW	•
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The Policy Review form.

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



- 4. **Optional**: In the **Policy Narrative** section:
 - a. Drag files to the **Supporting Attachments** section to add them to the policy. You can also click in the boxes below **Supporting Attachments** to browse for files on your machine, or to enter a web link.
 - b. If you do not attach any supporting documentation to the policy, document its body text in the **Policy Narrative** field.

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It is best practice for the Policy Owner to edit this section. The Policy Reviewer has access to it only in the event that they have changes to make in addition to what has already been done.

5. In the **Review Comments** section, enter any comments under the **Policy Reviewer Comments**.



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The Review Comments section.

- 6. Select one of the following options:
 - **Send Back to Owner**: Moves the Policy back into an **Under Revision** workflow state and sends it to the Policy Owner to make further updates.
 - **Complete Review**: Moves the Policy back into an **Active** workflow state.