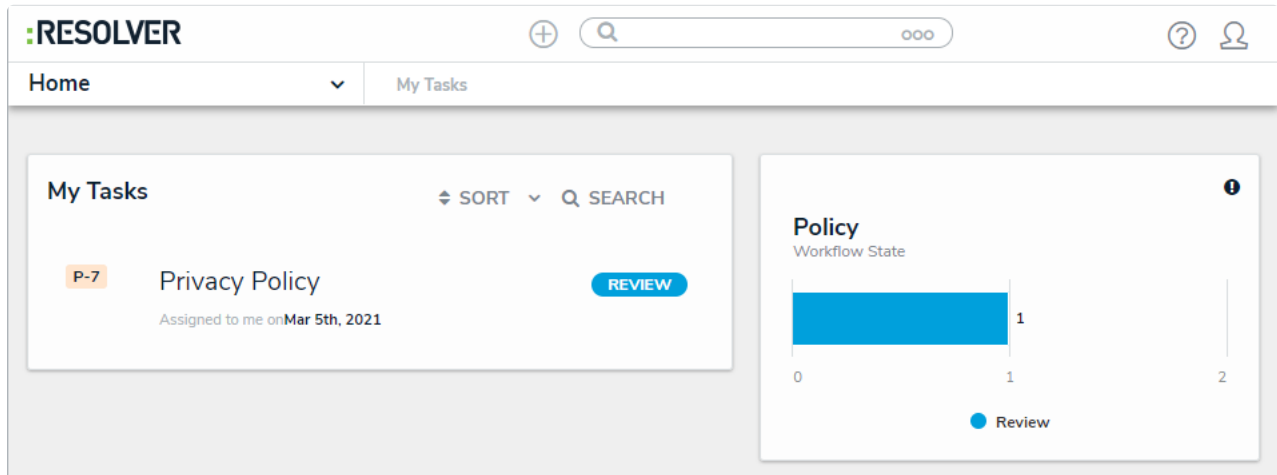


Review a Policy

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.



The screenshot displays the RESOLVER interface. At the top, there is a navigation bar with the RESOLVER logo, a search bar, and user profile icons. Below this, a breadcrumb trail shows 'Home' and 'My Tasks'. The main content area is divided into two panels. The left panel, titled 'My Tasks', includes a 'SORT' dropdown and a 'SEARCH' input. It lists a task: 'Privacy Policy' with a 'P-7' tag, assigned to the user on 'Mar 5th, 2021'. A blue 'REVIEW' button is positioned to the right of the task. The right panel, titled 'Policy', shows a 'Workflow State' chart. The chart has a horizontal axis from 0 to 2 and a vertical axis. A blue bar extends to the value 1, and a legend below indicates that this bar represents the 'Review' state.

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.

Daily or Weekly Trial Balances P-5 REVIEW ⋮

Details 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.

 **PRINT / EXPORT**

Policy Details

Policy Name

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

Policy Owner

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.

Policy Narrative

Supporting Attachments

Drag files here or click to select...

or

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

Policy Narrative

Normal ▼ **B** *I* U

Double-entry accounting ensures that the books are always balanced. However, errors and fraud can still exist in a double-entry accounting system, which is why trial balances should be used in conjunction with this method. Trial balances are a form of accounting control that infuse additional reliability into the system by keeping an internal record of credits and debits to allow businesses to identify issues early on.

Your content is saved

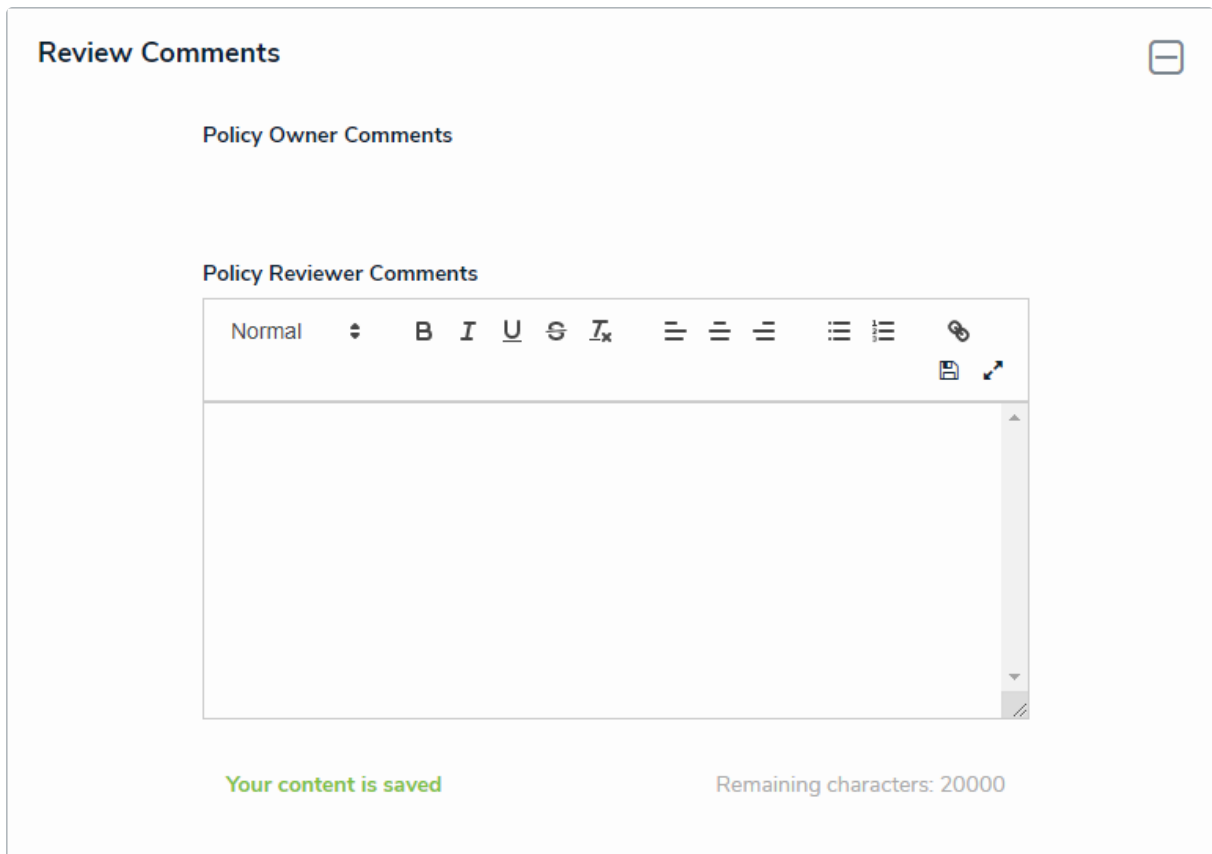
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The Policy Narrative section.



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**.



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.