Annual Review Quick Start Guide

Policy Review Process

Create a Draft

1. Log in to ComplianceBridge using your local site credentials. Single Sign-On access begins in **End User Portal** module. To access your policies, click on **Director**.



2. In the Organization dashboard, click to select your *Group*.

		The University of Alabama			O Logout
	Group Name		Members	Email	Information
	University of Alabama		489.	\bowtie	i
	Academic Affairs	Note:	488	\bowtie	i
MODULE:	Capstone College of Nursing		888	\bowtie	i
Director	Capstone International		4 <u>9</u> 2		i
Compliance Bridge	College of Arts & Sciences	You will only have access to your group(s) but you can	488		<u>i</u>
	Brewer Porch Children's Center	see all Groups. Click "My Groups" to narrow your view.	88	\bowtie	i
Administrator	ROTC		e/he	5-0	_ <u>i</u>
End User Portal Organization	College of Community Health Sciences		-85		$-\frac{i}{\cdot}$
My Settings	Student Health Center and Pharmacy		125		<u> </u>
	University Medical Center		255		i
	College of Continuing Studies		-88		i
	College of Education		-884	\boxtimes	i
	College of Engineering		488	\bowtie	i
	College of Human Environmental Sciences		488	\bowtie	i
	College of Communication and Information Sciences		2 <u>8</u> 8	\bowtie	i
	Culverhouse College of Business		483	\bowtie	i
	Enrollment Management		4894	\bowtie	i
	Graduate School		<i>8</i> 88	\bowtie	i
	Honors College		4 <u>9</u> 2	\bowtie	i
	Office of Disability Services				i
	Office of Information Technology		888	\bowtie	i

3. In the left side bar menu, click **Revise Document** for full access to the policies that you have access to revise.

	■ The University of Alabama				② Lopout
7		D	Prafts		
	Sort by Title	Sort by Doc ID	Document Type	Version	Sort by Date
	My New Policy		Policies	1.0	Jun 8, 2021 4:00pm
NODULE:	Attendance Policy Test		Policies	1.0	Jun 8, 2021 1:15pm
Director		©2005-2021 Compliancel Terr	Bridge Corporation. Subject to ns of Use		
Logged in as Test User					
Organization Sandbox and Testing i					
Documents Drafts					
New Document Revise Document Reports	-				
My Settings					

4. Click on the **Document Title** to begin your policy review.

7	The University of Alabama			⑦ Logout
H	"Sandbox and Testing" Document Revision - Solect the Type of document, then the document to revise Select Document Type: Select Document Type: Show Categories Defaults to your "Policies" folder which contains previously published policy documents.			Return
Director Logged in as	Search carbon search and an an and an	Version	Publish Date	
Test User Logout	ORED Policy Test One document found.	1.1	May 05, 2021	
Organization Sandbox and Testing	©2005-2021 Co	Return mplianceBridge Corporation. So Terms of Use	ubject to	
My Settings				

5. Update the **Document Properties** and all other document metadata on this page as necessary.

Note: Verify that the Policy Contact name and title are accurate.

7	The University of Alabama New document for Sandbox and Testing			
	Document Properties	Policies Document		
	Document Title:	Document Title Here		
MODULE:	Version:	1.0		
Director Logged in as	Document ID:			
Test User Logout	Training Required	Required		
- Organization	Policy Contact	Jennifer Clark		
Sandbox and Testing	Policy Contact Title	Institutional Compliance Coordinator		
Documents	Effective Date	06-08-2021		

6. When all fields are completed on this page, click **Save**.

Review the Content

Review the policy content to determine if any changes are needed.

- a. Check all hyperlinks within the policy body to ensure that they are still active.
- b. Read the content to ensure that it is still current.
- c. Use the Seek Advice/Approval instructions below to forward the draft for review by others within your unit as appropriate.

If Changes are Needed

Edit the policy content and forward for review as a policy revision. Detailed instructions for initiating a policy revision are available in the <u>Policy Editor QuickStart Guide</u>.

If NO Changes are Needed

- 1. Click **Properties** in the top, right corner of the screen to return to the **Document Properties** screen.
- 2. Enter a note to document that a review has been conducted and no changes are needed at this time.
- 3. Click Save.

4. From the Document Editing Dashboard, click **Seek Advice/Approval**.



5. Send the draft to the UA Policy Manager for review.

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A	Get Advice/Austronal Inc: Thites Philor services 1.0 I. S Allows (Editional Comments (Not Editable) O Allows (Editional Comments (No Approval))	Return		
MODULE: Director Logged in as Test User Logoul Sandbox and Testing Documents Director Search Documents New Document Revise Document Revise Document	Search Select Advisors 2. Let of all teers Tot, Genge (last, Board) User, Test (dynamburg) Wates, Katerie (brukks.g.) User, Test (dynamburg) Wate, Katerie (brukks.g.) User, Test (dynamburg) <th></th>			
My Settings				
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Section 1: Make sure the following option is selected: Allow Editing and Comments (No Approval)

- Section 2: Double click to add UA Policy Manager to the selected addresses box.
- Section 3: Click Save and Continue.

Section 4: Provides advanced workflow staging, not applicable to your implementation.

Section 5: Click Send Now.