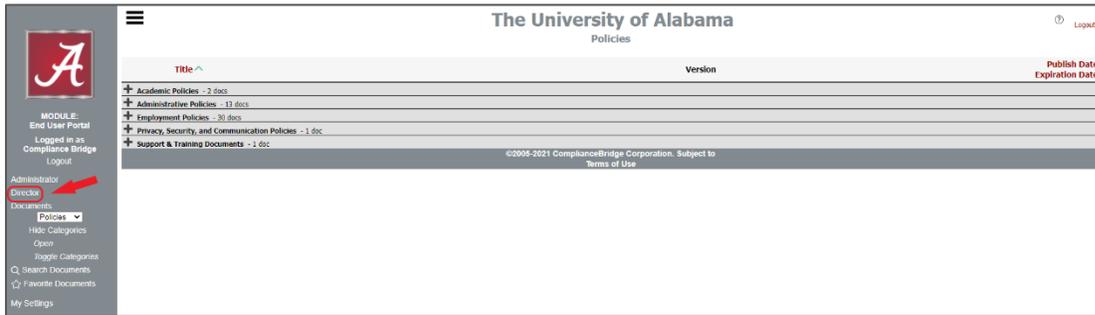


# Annual Review Quick Start Guide

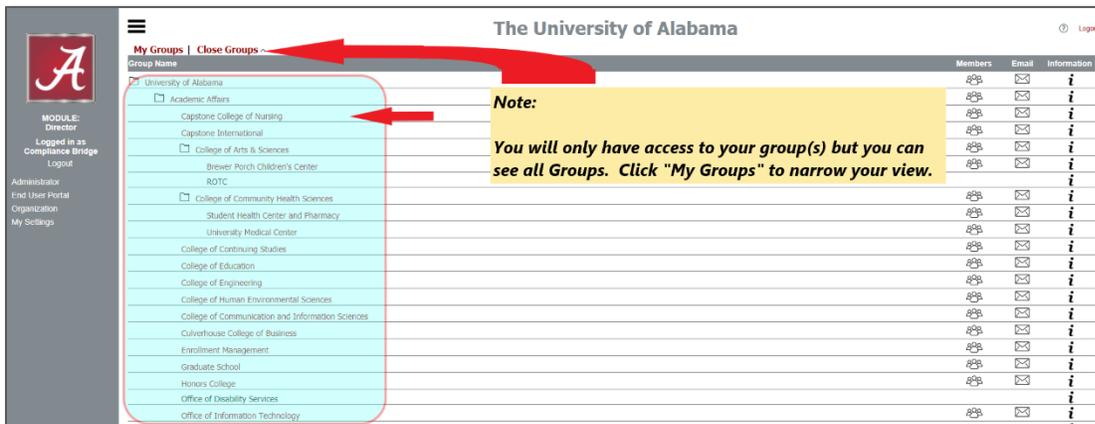
## Policy Review Process

### Create a Draft

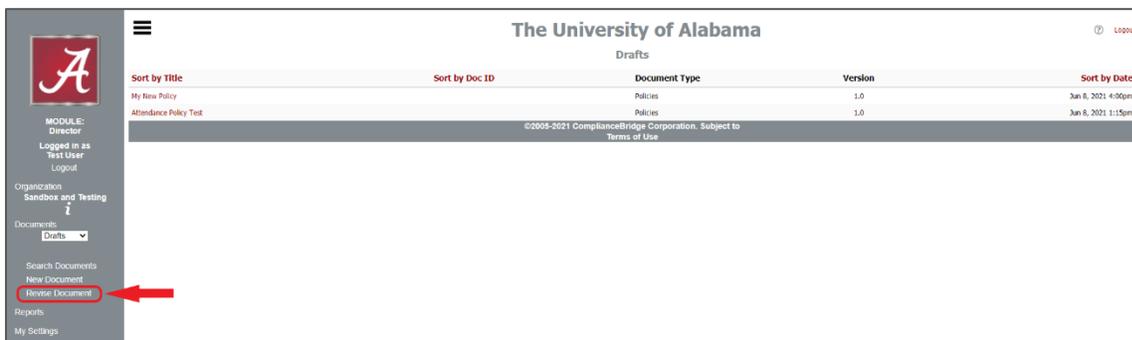
1. Log in to ComplianceBridge using your local site credentials. Single Sign-On access begins in **End User Portal** module. To access your policies, click on **Director**.



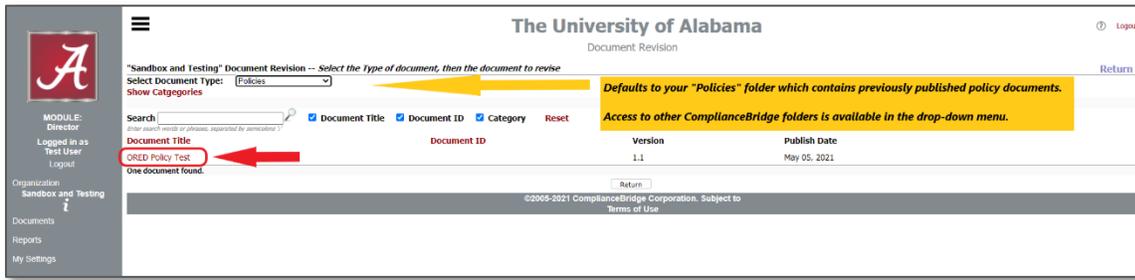
2. In the Organization dashboard, click to select your **Group**.



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

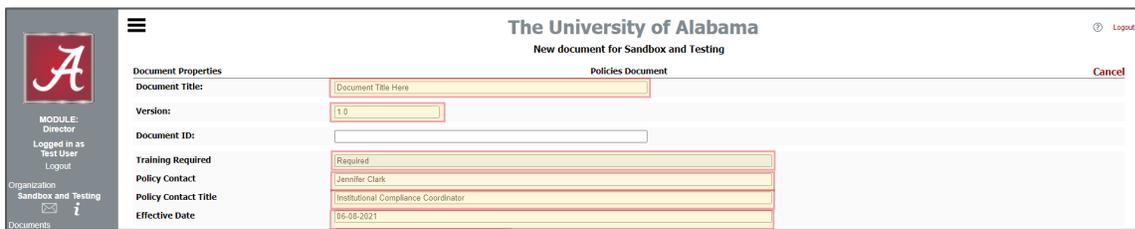


- Click on the **Document Title** to begin your policy review.



- 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.



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

## Review the Content

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

- Check all hyperlinks within the policy body to ensure that they are still active.
- Read the content to ensure that it is still current.
- 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 [Policy Editor QuickStart Guide](#).

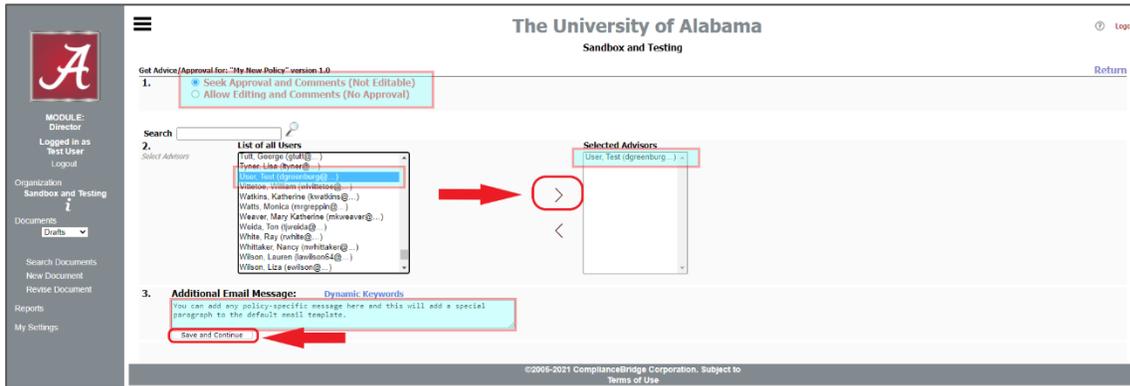
## If NO Changes are Needed

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

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



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



**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**.