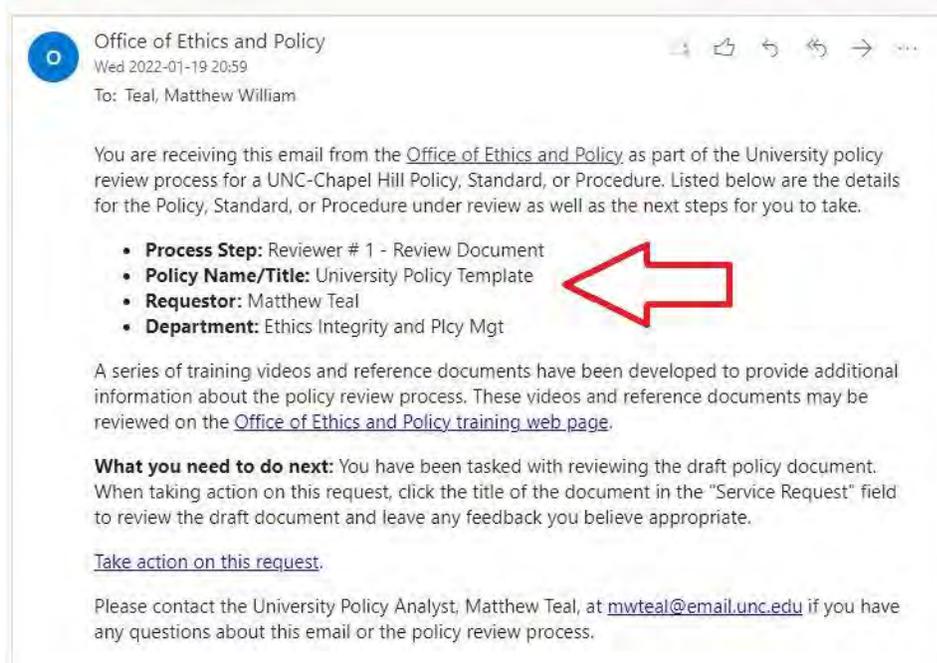


Document Reviewers - How to Review a Draft Policy Document

Here are the steps you need to take if you receive an email asking you to help review and provide feedback on a draft policy document:

1. Read the email to see the title of the draft document and the name of the Requestor who is asking for your help.



2. Click the "Take action on this request" link at the bottom of the email.

What you need to do next: You have been tasked with reviewing the draft policy document. When taking action on this request, click the title of the document in the "Service Request" field to review the draft document and leave any feedback you believe appropriate.

[Take action on this request.](#)

Please contact the University Policy Analyst,

Document Reviewers - How to Review a Draft Policy Document

3. Your web browser will open and take you to the policy website page to review the draft document.

Current Workflow Step

Service Request Details

Service Request
18310458: [University Policy Template](#)

Description
This document is intended to assist individuals with brainstorming, developing, and finalizing policy documents through the official University policy process.

Choice Step Details

Step
Reviewer # 2 - Review Document

Assigned To
[Matthew Teal](#)

Description
You have been tasked with reviewing the draft policy document. When taking action on this request, click the title of the document in the "Service Request" field to review the draft document and leave any feedback you believe appropriate.

✓ Review Complete

↻ Re-send Notification

Requestor

MT

[Matthew Teal](#)
mvt teal@email.unc.edu

4. To view the draft document, click the title of the document under "Service Request" on the left side of the page.

Current Workflow Step

Service Request Details

Service Request
18310458: [University Policy Template](#)

Description
This document is intended to assist individuals with brainstorming, developing, and finalizing policy documents through the official University policy process.

Choice Step Details

Step
Reviewer # 2 - Review Document

Assigned To
[Matthew Teal](#)

Description
You have been tasked with reviewing the draft policy document. When taking action on this request, click the title of the document in the "Service Request" field to review the draft document and leave any feedback you believe appropriate.

✓ Review Complete

↻ Re-send Notification

Requestor

MT

[Matthew Teal](#)
mvt teal@email.unc.edu

Document Reviewers - How to Review a Draft Policy Document

5. On the next page, click the draft document in the “Attachments” section on the right side of the page. This will download the draft document to your computer.
 - a. There may also be attachments that accompany the document as well. Be sure to review all documents.

The screenshot displays a document review interface. On the left, the 'Details' section includes: Account/Department: Ethics Integrity and Picy Mgt; Service: Approval Workflows / Reviewing and Approving Policy Documents; Workflow: Approval Workflow - Reviewing and Approving Policy Documents; Current Workflow Steps: Reviewer # 1 - Review Document, Reviewer # 2 - Review Document, Policy Analyst Review; Reviewer: Matthew Teal; Created: Wed 1/19/22 1:05 PM by Matthew Teal; Last Modified: Wed 1/19/22 1:05 PM by Matthew Teal. The 'Description' section states: 'This document is intended to assist individuals with brainstorming, developing, and finalizing policy documents through the official University policy process.' The 'Feed (0)' section has 'Comment' and 'Update' buttons and a message: 'No feed entries were found.' On the right, the 'Attachments (1)' section shows a document titled 'SAMPLE - University Policy Template.docx' uploaded on Wed 1/19/22 1:05 PM by Matthew Teal, with a 'Delete' button. Below it is an upload area: 'Drag and drop attachments here to upload. A maximum of 4 MB can be uploaded at once.' The 'Read By (2)' section lists: Matthew Teal (Wed 1/19/22 1:17 PM) and Jen DeNeal (Wed 1/19/22 1:05 PM). A red arrow points from the 'Attachments' section towards the 'Description' section.

6. Once you have reviewed the draft, you can add any comments you feel are appropriate by clicking the “Comment” button.

The screenshot shows the 'Feed (0)' section with 'Comment' and 'Update' buttons. A red arrow points to the 'Comment' button. Below the buttons is a light blue box with the text: 'No feed entries were found.'

7. Type your comment in the box that appears and click the “Save” button.

The screenshot shows a comment input form. At the top is 'Feed (0)' and an 'Update' button. Below is a notification bar with 'Notify...' and icons. A large text input box contains the placeholder text 'Comment'. A red arrow points to this text box. Below the text box are 'Save' and 'Cancel' buttons. Another red arrow points to the 'Save' button.

8. Hit the “Back” button on your browser until you are back to the screen from Steps 3 and 4, above.

Document Reviewers - How to Review a Draft Policy Document

9. Click the green "Review Complete" button to let the Requestor know that you have completed your review.

Current Workflow Step

Service Request Details

Service Request
18310428 TEST - Parking Ordinance

Description
This document will help people park good.

Choice Step Details

Step
Reviewer # 2 - Review Document

Assigned To
[Matthew Teal](#)

Description
You have been tasked with reviewing the draft policy document. When taking action on this request, click the title of the document in the "Service Request" field to review the draft document and leave any feedback you believe appropriate.



Review Complete

Re-send Notification

Requestor

MT Matthew Teal
mteal@email.unc.edu

10. You are done! You can now sign out of the policy website.
11. Please contact the University Policy Analyst, Matthew Teal, if you have any trouble with this process or have any questions.
 - a. Email: mwteal@email.unc.edu