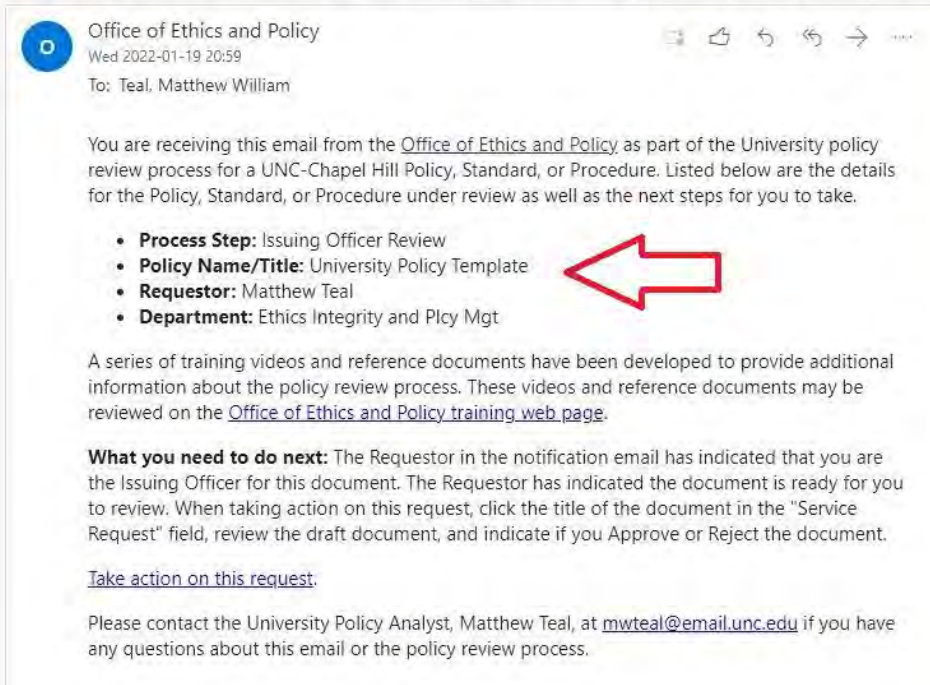


Issuing Officers - How to Approve or Reject a Draft Policy Document

Here are the steps you need to take if you receive an email stating you are the Issuing Officer for a draft policy document currently under review.

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

Action Required - Reviewing UNC Policy Document: University Policy Template



The screenshot shows an email interface. At the top left is a blue circular profile icon with a white 'O'. To its right, the sender is identified as 'Office of Ethics and Policy' with the date 'Wed 2022-01-19 20:59'. Below this, the recipient is listed as 'To: Teal, Matthew William'. On the right side of the header, there are icons for reply, reply all, forward, and other actions. The main body of the email contains a paragraph explaining the review process, followed by a bulleted list of details: 'Process Step: Issuing Officer Review', 'Policy Name/Title: University Policy Template', 'Requestor: Matthew Teal', and 'Department: Ethics Integrity and Plcy Mgt'. A red arrow points to the 'Policy Name/Title' item. Below the list is a paragraph about training videos and a link to the 'Office of Ethics and Policy training web page'. This is followed by a 'What you need to do next' section and a link 'Take action on this request'. At the bottom, there is contact information for Matthew Teal. A second red arrow points to the 'Take action on this request' link.

Office of Ethics and Policy
Wed 2022-01-19 20:59
To: Teal, Matthew William

You are receiving this email from the [Office of Ethics and Policy](#) as part of the University policy review process for a UNC-Chapel Hill Policy, Standard, or Procedure. Listed below are the details for the Policy, Standard, or Procedure under review as well as the next steps for you to take.

- **Process Step:** Issuing Officer Review
- **Policy Name/Title:** University Policy Template
- **Requestor:** Matthew Teal
- **Department:** Ethics Integrity and Plcy Mgt

A series of training videos and reference documents have been developed to provide additional information about the policy review process. These videos and reference documents may be reviewed on the [Office of Ethics and Policy training web page](#).

What you need to do next: The Requestor in the notification email has indicated that you are the Issuing Officer for this document. The Requestor has indicated the document is ready for you to review. When taking action on this request, click the title of the document in the "Service Request" field, review the draft document, and indicate if you Approve or Reject the document.

[Take action on this request.](#)

Please contact the University Policy Analyst, Matthew Teal, at mwteal@email.unc.edu if you have any questions about this email or the policy review process.

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

What you need to do next: You have been to appropriate.

[Take action on this request.](#)

Please contact the University Policy Analyst,

Issuing Officers - How to Approve or Reject 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
18310472: [University Policy Template](#)

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

Approval Step Details

Step
Issuing Officer Review

Assigned To
[Matthew Teal](#)

The workflow will move forward once any approver approves this step.

Description
The Requestor in the notification email has indicated that you are the Issuing Officer for this document. The Requestor has indicated the document is ready for you to review. When taking action on this request, click the title of the document in the "Service Request" field, review the draft document, and indicate if you Approve or Reject the document.

Approve

Reject

Re-send Notification


Requestor

MT Matthew Teal
mvrteal@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
18310472: [University Policy Template](#) 

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

Approval Step Details

Step
Issuing Officer Review

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Approve

Reject

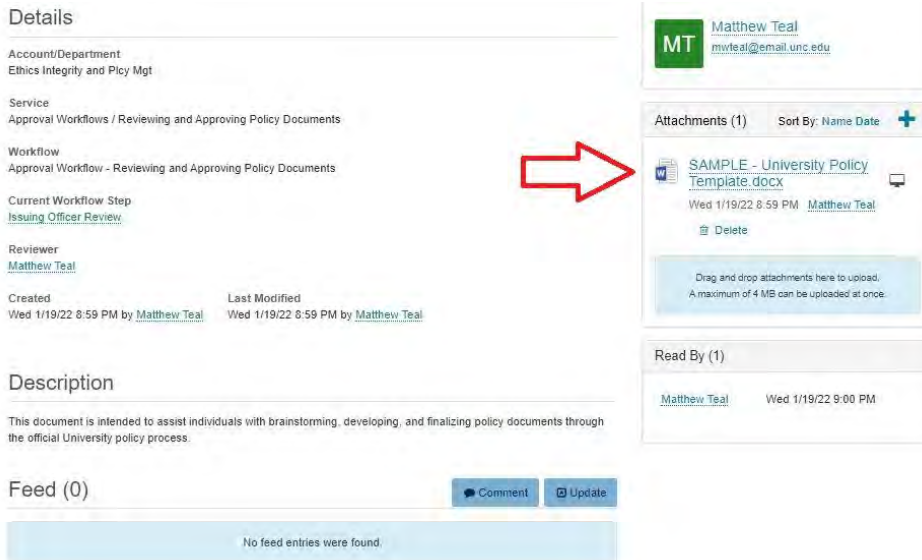
Re-send Notification

Requestor

MT Matthew Teal
mvrteal@email.unc.edu

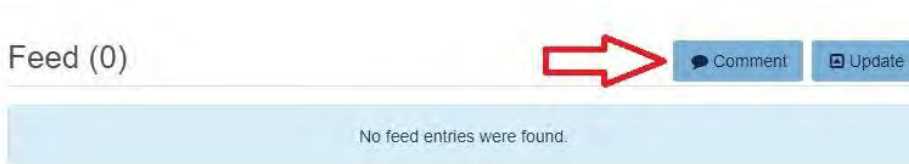
Issuing Officers - How to Approve or Reject a Draft Policy Document

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.



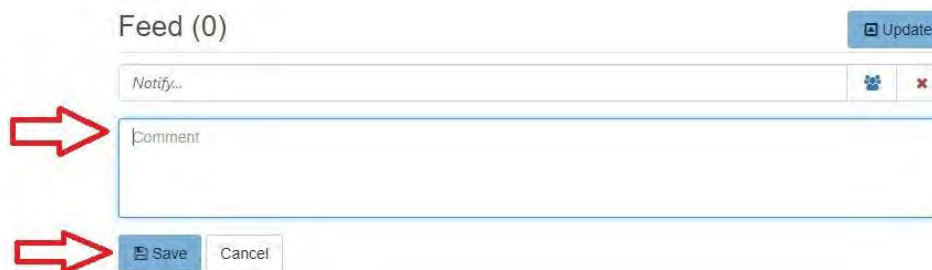
The screenshot shows a document details page. On the left, there is a 'Details' section with fields for Account/Department (Ethics Integrity and Pcy Mgt), Service (Approval Workflows / Reviewing and Approving Policy Documents), Workflow (Approval Workflow - Reviewing and Approving Policy Documents), Current Workflow Step (Issuing Officer Review), Reviewer (Matthew Teal), and Created/Last Modified dates. On the right, there is an 'Attachments (1)' section with a red arrow pointing to a document titled 'SAMPLE - University Policy Template.docx'. Below the attachments is a 'Read By (1)' section listing Matthew Teal. At the bottom, there is a 'Feed (0)' section with 'Comment' and 'Update' buttons.

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 of the document page. A red arrow points to the 'Comment' button, which is located next to the 'Update' button. Below the buttons is a light blue bar 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 the comment input form. A red arrow points to the 'Comment' text box, which has a placeholder text 'Comment'. Another red arrow points to the 'Save' button, which is located next to the 'Cancel' button. The 'Update' button is also visible in the top right corner of the form.

8. Hit the “Back” button on your browser until you are back to the screen with the “Approve” and “Reject” buttons.

Issuing Officers - How to Approve or Reject a Draft Policy Document

9. Click either the “Approve” or “Reject” button to indicate if you approve of the draft document.
 - a. If you have any concerns about the document, please contact the Requestor directly
 - b. Please also contact the University Policy Analyst, Matthew Teal, if you have any trouble with this process or have any questions.
 - i. Email: mwteal@email.unc.edu
10. You are done! You can now sign out of the policy website.