

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

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 t:
appropriate.

[Take action on this request.](#)

Please contact the University Policy Analyst,

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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.

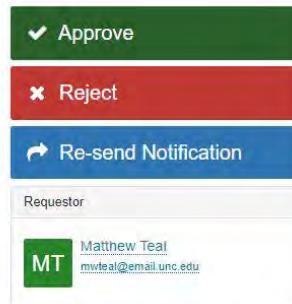
Approval Step Details

Step
Issuing Officer Review

Assigned To
[Matthew Teal](#)

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

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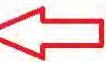


4. To view the draft document, click the title of the document under "Service Request" on the left side of the page.

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Service Request Details

Service Request
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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 "Details" page for a policy document. It includes sections for "Account/Department" (Ethics Integrity and Policy 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" and "Last Modified" dates (Wed 1/19/22 8:59 PM). A red arrow points to the "Attachments (1)" section, which lists a file named "SAMPLE - University Policy Template.docx" uploaded by Matthew Teal on Wed 1/19/22 8:59 PM. Below the attachments is a placeholder for dragging and dropping more files. The "Read By (1)" section shows Matthew Teal reading the document on Wed 1/19/22 9:00 PM. At the bottom, there is a "Feed (0)" section with a "Comment" button.

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

The screenshot shows a "Feed (0)" page. A red arrow points to the "Comment" button, which is highlighted in blue. Below the feed, a message says "No feed entries were found."

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

The screenshot shows a modal dialog box for commenting. A red arrow points to the "comment" text input field. Another red arrow points to the "Save" button at the bottom left of the dialog. The dialog also includes a "Notify..." dropdown and "Cancel" button.

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

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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.