How to Create a New Approval Workflow Request

1. Log into the University’s policy website: policies.unc.edu.
2. Click “Knowledge Base” in the menu bar along the top of the page:

The University of North Carolina at Chapel Hill Policies, Procedures and Standards

The policies, procedures and standards of the University of North Carolina at Chapel Hill are maintained in the Office of Policy. To find a policy, procedure, or standard, you may utilize the search box above or browse policies by unit.

If you have any questions or concerns about a specific policy, please reach out to the Responsible Unit document. If you have general UNC-Chapel Hill policy questions, please contact the Office of Ethics and Compliance.

3. Click “Services” in the menu bar along the top of the page:

Knowledge Base

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4. Click the “Approval Workflows” link under “Service Catalog.”

5. Click the “Reviewing and Approving Policy Documents” link.
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6. Click the green “Request Service” button in the menu on the right side of the page.
   a. You may have other green buttons than those shown in this screenshot. You can ignore all options except “Request Service.”

7. The system will load a form. Please complete the form using the prompts.
8. Once you complete the form, click the “Request” button at the bottom of the page.

9. Congratulations! You will see a confirmation page saying you have successfully created an approval workflow request. You can click on the “View the ticket you just created” link to review your request.

10. 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