

Ensuring that policy documents are up-to-date and accessible is crucial for maintaining organizational standards and compliance. This document provides guidance on how to publish new or updated policy documents, who is responsible for the publication process, and how to update review dates without altering the policy content.

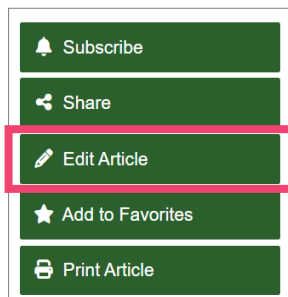
Note: Only the University Policy Office administrators can publish a policy document.

Updating Review Dates Only

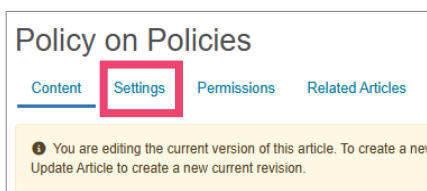
The policy repository sends automatic monthly reports to each unit listing out what policies belonging to that unit are out-of-date. They are considered out-of-date if the Next Review date has already passed. If a unit changes that date to be in the future, it will no longer appear in future automatic reports.

If there are no changes to the policy document, follow these steps to update only the repository dates:

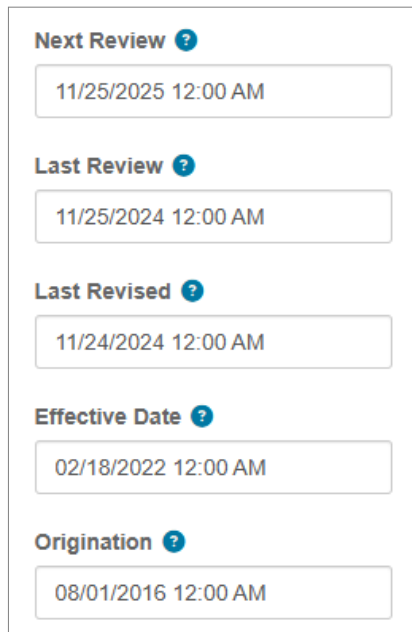
1. Login to the policy repository with your SSO.
2. Navigate to the policy you are ready to publish.
3. Click the **Edit Article** button.



4. Click the **Settings** tab.



5. Update any of the available dates (Next Review, Last Review, Last Revised).



Next Review ?	11/25/2025 12:00 AM
Last Review ?	11/25/2024 12:00 AM
Last Revised ?	11/24/2024 12:00 AM
Effective Date ?	02/18/2022 12:00 AM
Origination ?	08/01/2016 12:00 AM

6. Click the **Save** button.

Result: The automatic reports will pull from these new dates.

Notifying the University Policy Office When a Policy Draft is Ready for Publication

There are two ways to communicate when a policy draft is ready to be published.

Option 1: Email the University Policy Office

Email Matthew Teal (mwteal@email.unc.edu) and Shoshana Ellis (shoellis@unc.edu) with the information below:

- **Title of Policy:** The title of the policy you are ready to publish.
- **Next Review:** When you want to revisit this policy. Default is 1 year, but 3 years can be done for low-risk policies that don't change often.

- **Last Review:** Typically the same day you request publication.
- **Last Revised:** Typically the same day as the “last review” if more than minor typographical changes were made.
- **Effective Date:** When the new language goes into effect. This date may not need to be changed if the policy has not substantively changed.

Option 2: Send a Comment via the Policy Repository

1. Login to the Policy Repository with your SSO.
2. Navigate to the policy you are ready to publish.
3. Click the **Comment** button at the bottom of the page.
4. Enter **Matthew Teal** and **Shoshana Ellis** in the Notify field.
5. Enter information about when you want to publish and the next review dates for the policy in the Comment field.
6. Click the **Save** button.

The screenshot shows a web interface for a policy repository. At the top, there are tabs for 'History (40)' and 'Feedback (0)'. Below these is a 'Comment' button, which is highlighted with a red box. Underneath is a 'Notify' field containing the names 'Matthew Teal' and 'Shoshana Ellis', also highlighted with a red box. Below the 'Notify' field is a 'Comment' field with a rich text editor toolbar. The text in the comment field is 'I'm ready to publish this policy. Here are the dates for you to update:' followed by a bulleted list: 'Next Review', 'Last Review', 'Last Reviewed', and 'Effective Date'. This entire comment area is highlighted with a red box. At the bottom of the form are 'Save' and 'Cancel' buttons, with the 'Save' button highlighted in red.

Result: Prior to publication, the policy repository will contact you with any questions. Once published, they will inform you that the updates have been made.