

Review Process for an Existing UCPL Document



Unscheduled review
– may be initiated at any stage prior to the scheduled review

Scheduled review
– initiated by PU 90 days prior to the review date

Scheduled review date

Policy review overdue

CO to email PU to advise that an unscheduled policy review is to commence and to request the link to edit the official UCPL document

PU to email CO the link to edit the UCPL document

PU to email CO (& cc AA) at 90, 60 and 30 days (as required) prior to review date advising policy due for review & enclosing link to edit the UCPL document

If no action by CO

Overdue reminder emails sent to CO (& cc AA) at 30 day intervals after review date

CO to review policy:

1. Open link using Internet Explorer browser
2. Edit document using “track changes” in Review tab
3. Save document within browser not separately

CO: Does policy require further consultation, i.e., with SMTi or other committees/ stakeholders?

CO to take policy out for consultation

CO to update policy following consultation

CO to email PU once review complete & to recommend length of review period (1, 2 or 3 years)

PU to review policy:

1. Check for consistency with UCPL standards and style guide
2. Update glossary
3. Update cross-referenced compliance docs
4. Update metadata

PU: Are there major changes requiring AA endorsement?

PU to email AA link to policy document to review

AA to review policy:

1. Open link using Internet Explorer browser
2. Edit using “track changes” in Review tab
3. Save document within browser

AA to take policy to SMT for information (as per Metapolicy)

AA to email PU to advise document approved for publishing

PU to complete review & publish policy document:

1. Update metadata if required
2. Accept all changes
3. Save document within browser
4. Save as PDF in Published Compliance Documents library
5. Check if updated document published
6. Update UCPL web pages and SMT report

Key:
AA = Approval Authority
CO = Contact Officer
PU = Policy Unit
UCPL = UC Policy Library

