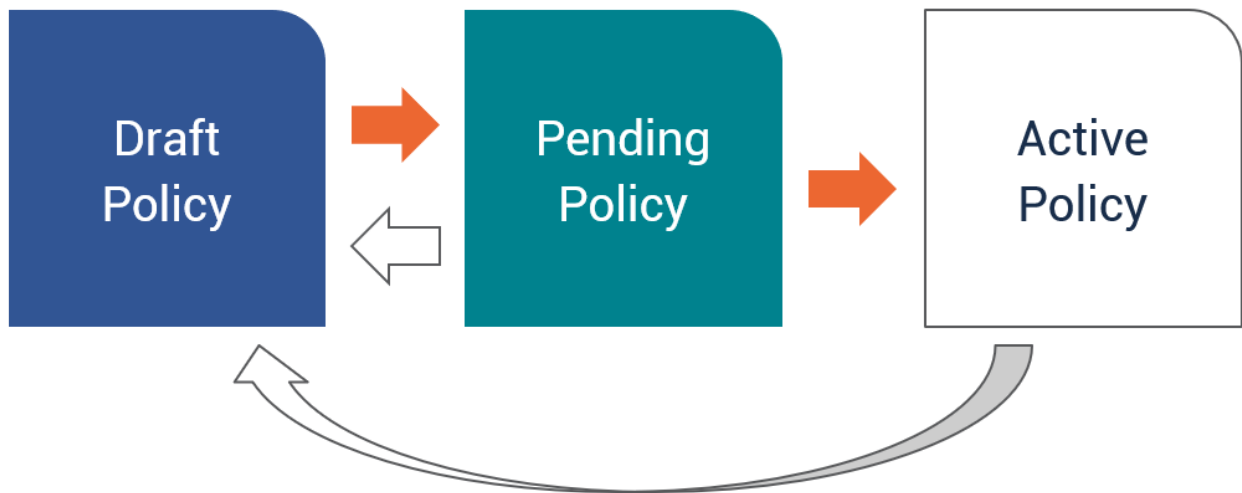


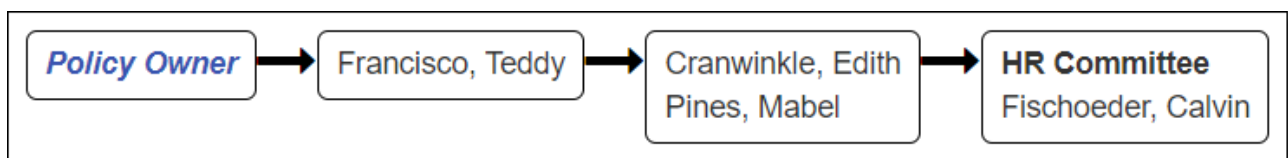
Approval Workflows in PolicyStat

All policies start in a draft format and pend for approval through an Approval Workflow. Each time edits are made, a new draft is created and the Workflow restarts. When the policy completes the Workflow, it becomes active and searchable. The graphic below displays the lifecycle process for a policy to move from draft to active within PolicyStat.

Policy Life cycle



Sample Workflow



Starting the Approval Workflow

Once a draft is considered complete, a user with Edit rights (Owner, Approver, Area Editor, Area Manager, Site Administrator) starts the Approval Workflow process.

For more information on this process, [see this article](#).



Approve During an Approval Workflow

Once the Approver marks their approval, automatic routing moves the policy from one Approver (or committee) to the next in line.

For more on how to approve a pending policy as it progresses through a workflow, [see this article](#).

Reject/Edit During an Approval Workflow

If any Approver or Committee changes, edits, or rejects the policy, a new draft is created and the approval process restarts. This ensures Approvers view and approve only the latest version.

For more on how to reject or edit a pending policy, [see this article](#).

Comments and Collaboration

DID YOU KNOW?

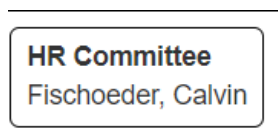
Approval Workflows cover the required steps for compliance, but PolicyStat also offers collaborative commenting to gather input from any PolicyStat users outside the Workflow within the tool.

For more on PolicyStat collaboration features, [see this article](#).

Approval Committees

Some policies require review by a committee, and sometimes membership in the committee can be fluid and change often. In PolicyStat, an Approval Workflow can list a committee name and designate one Approver as responsible for marking that committee's approval. That way, the committee can discuss the policy during a meeting and mark approvals without requiring everyone to log in to PolicyStat to do so.

In the example below, on Step 3 of this Approval Workflow, Calvin would be responsible for presenting the pending policy to the HR committee. When the members of the HR committee agree to approve the policy, Calvin will be responsible for logging in to PolicyStat to provide approval on the committee's behalf.



What Happens Once All Approvers Have Approved?

By default, once the final Approver has marked their approval, the policy becomes Active. Any user can view the policy's content and search to locate the policy.

However, an effective date can be scheduled for a date in the future. During this period, the policy will move to a status of "Scheduled" and will not yet be live and searchable.

For more on scheduling an effective date, [see this article](#).

For additional help, visit the [RLDatix Customer Portal](#) or the [RLDatix Public Knowledge Base](#) to view knowledge articles or to contact our Support team.