Link to article: https://discover.claromentis.com/knowledgebase/articles/808

Renewing Policies

Overview

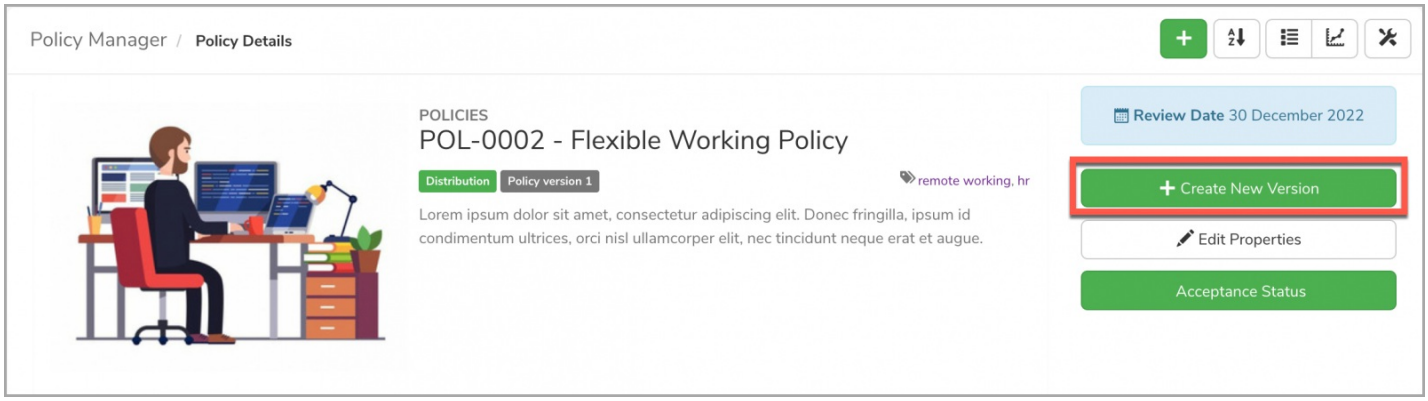
When policies are close to expiring, you'll need to renew them so they are up-to-date. In this article, we will provide you with the best way to go about renewing your annual policies while retaining the older version and its acceptance history.

If you would like to find out more about the Policy manager Lifecycle, please click here.

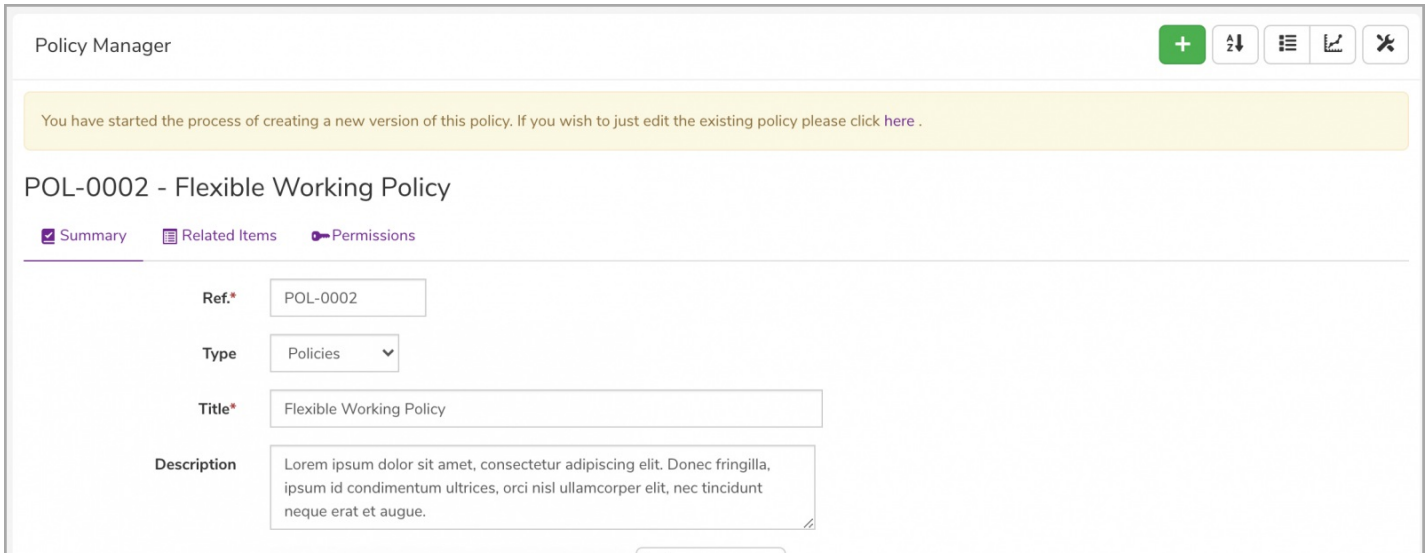
How to renew a policy

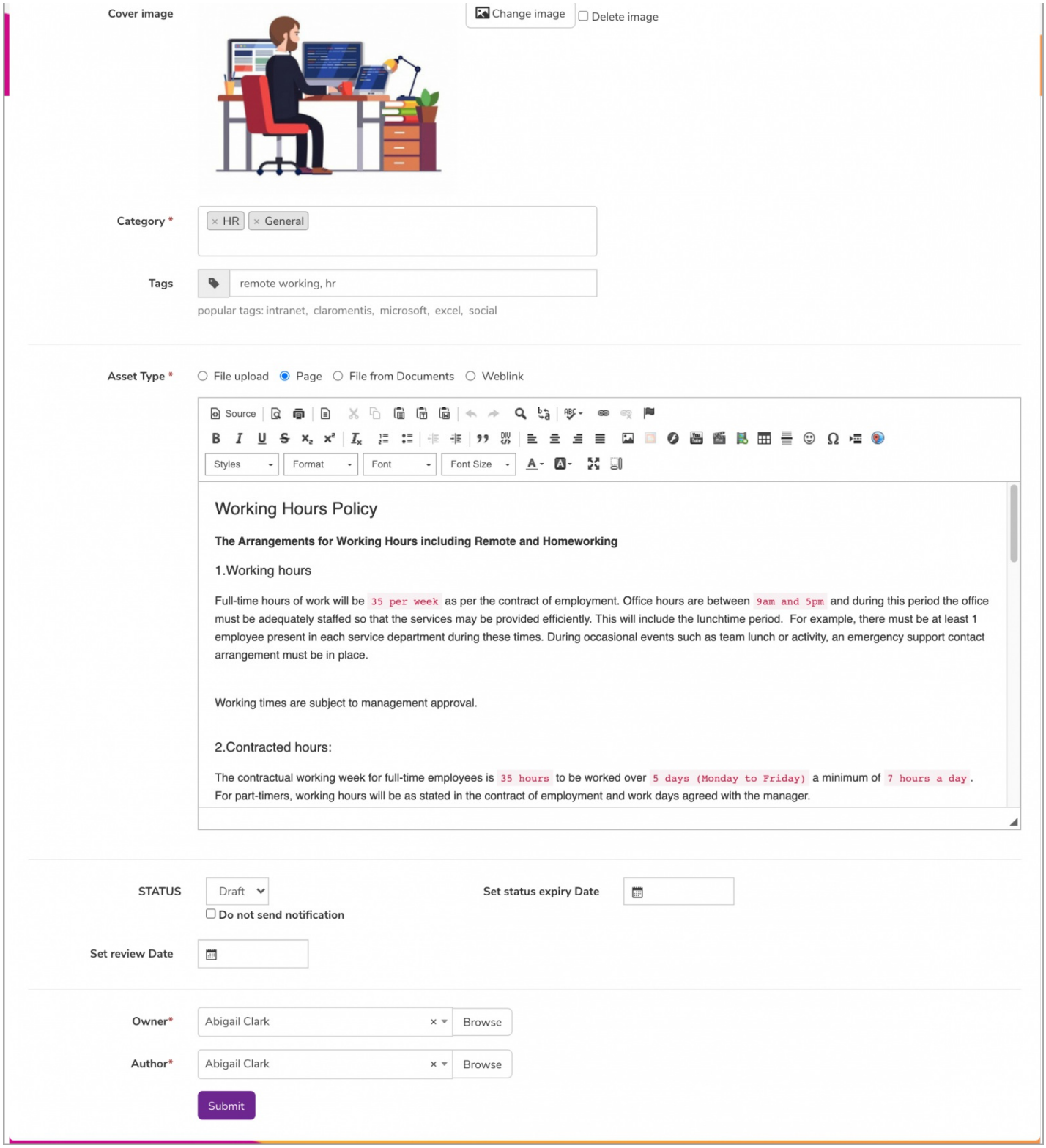
When renewing a policy, we recommend using our '+ Create New Version' feature. By doing so, the old policy will be available while the new one is created.

This policy is currently live and in version 1.

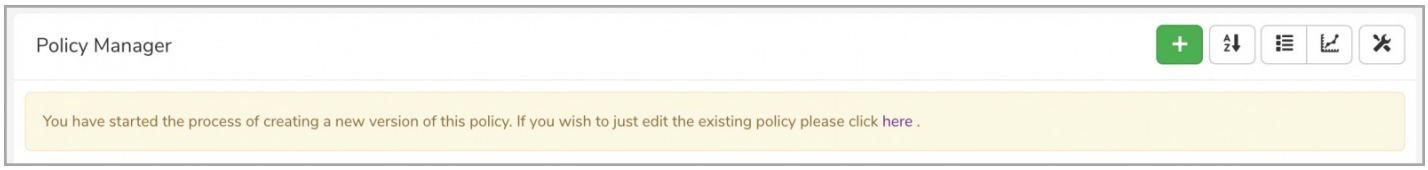


As you can see here, you can edit/update the existing policy without having to re-create one from scratch. Now you can update the reference number and content as needed to reflect the revised policy.

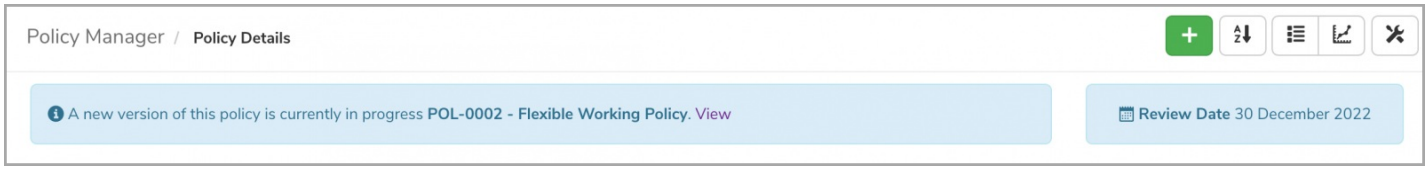




Please note: When creating a new version of the policy, you will see the following message indicating the new version is in the works and these edits will not affect the previous version.

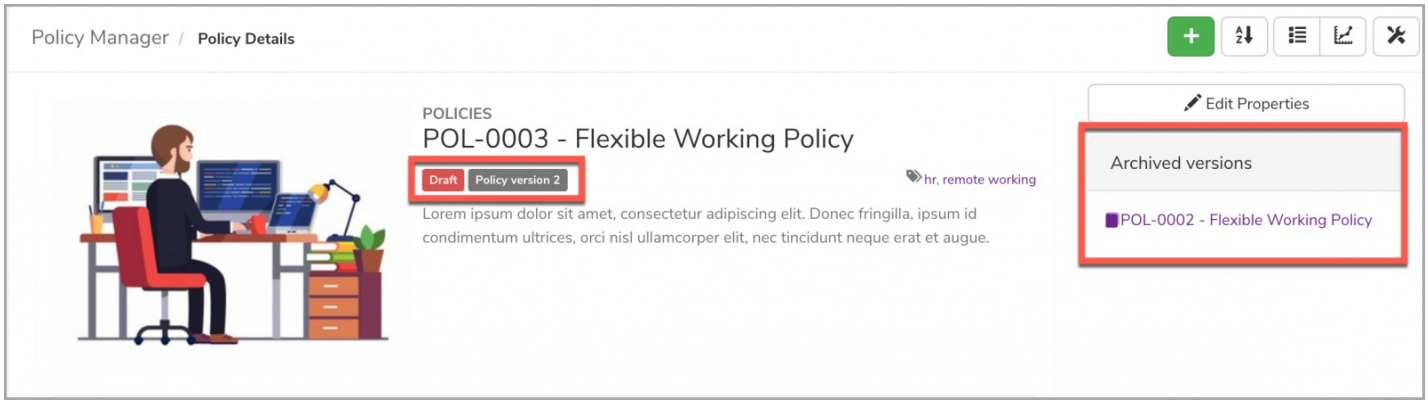


Similarly, when viewing the older version of the policy, users will see the following message indicating that the new version is currently in progress.



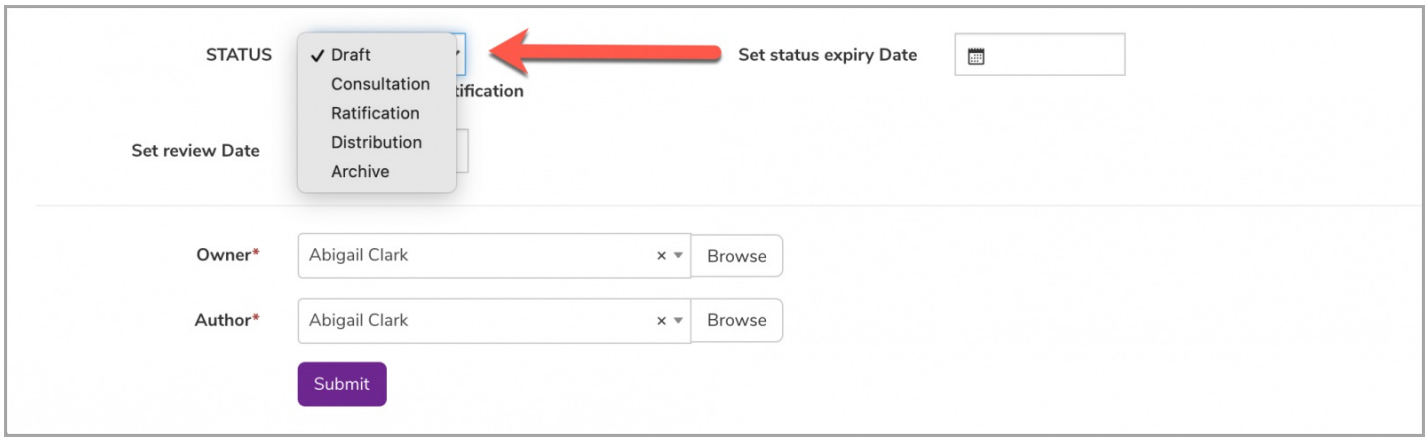
Once you have finished updating the policy and hit the 'Submit' button, the policy will save as 'Draft' and record the new version. You will also be able to see the Archived (previous) versions of the policy.

This version is currently not yet live but has been moved to version 2.



Reminder: Only those with permission will be able to see the Archived policies from the front-end of the application.

To move to the next stage of your workflow, select 'Edit properties' and change the status accordingly:



Distribution stage

Now that your policy is updated and ready to go, you can move it to the last stage, also known as the Distribution status.

Before this takes place, you will be prompted with the following option to choose whether to send a notification to users (in 'Target Distribution') of the new policy or not:

Please note: As stated above, the old version of the policy will automatically be recalled/archived and replaced with the new one. The old policy will be available from the Policy History and the acceptance history of the prior version will also be retained (in 'Acceptance Status').

For more information on recalled policies, please click here.

Your policy is now live and will appear as such:

Last modified on 1 December 2023 by Hannah Door

Created on 4 June 2021 by Veronica Kim
Tags: policy, policy manager, user guide, renew