



## Recalling Policies

### Overview

If for any reason you need to recall an existing policy, you can follow the steps provided below to keep your policies organised and up-to-date.

Any recalled policies will no longer be active and users will only be able to view them.

If you are simply looking to renew an existing policy, please refer to our article [here](#).

### How to recall a policy

1. To recall a policy, click into the edit properties of the policy in question.

A screenshot of the Policy Manager interface. The breadcrumb navigation shows 'Policy Manager / Policy Details'. On the right, there are several icons: a plus sign, a double-headed arrow, a list icon, a pencil icon, and a close icon. Below these are three green buttons: '+ Create New Version', 'Edit Properties' (which is highlighted with a red rectangle), and 'Acceptance Status'. The main content area shows an illustration of travel items (luggage, suitcase, hat, hot air balloon, palm trees, and an airplane) on the left. To the right of the illustration, the text reads: 'INSTRUCTION INS-0002 - Foreign travel advice', 'Distribution Policy version 1', and 'Travel Advice from UK Government'. A small logo for 'claromentis, travel' is visible to the right of the text.

2. From the Summary tab, you will see the 'Recall this policy' option. Once you check this box, hit 'Submit'.

STATUS   Do not send notification

Set status expiry Date

Set review Date

Recall this policy

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Owner\*

Author\*

3. You will be prompted with the following message where you can (1) confirm the action and (2) check the box to notify users of the recall.

Recall

You are about to recall this policy

Send notification to users?

4. Now you will be taken back to the front end of the policy where a message will let users know that the policy is no longer live and will be deleted/replaced.

Policy Manager / Policy Details

INSTRUCTION  
INS-0002 - Foreign travel advice

claromentis, travel

Travel Advice from UK Government

**Reminder:** Unlike when a policy is being renewed, when one has been recalled, users will only be able to view the policy and will no longer be able to

interact with it (i.e. accept policy).

**Please note:** As an admin, you will still be able to view the 'Acceptance History' of the policy if needed ↓

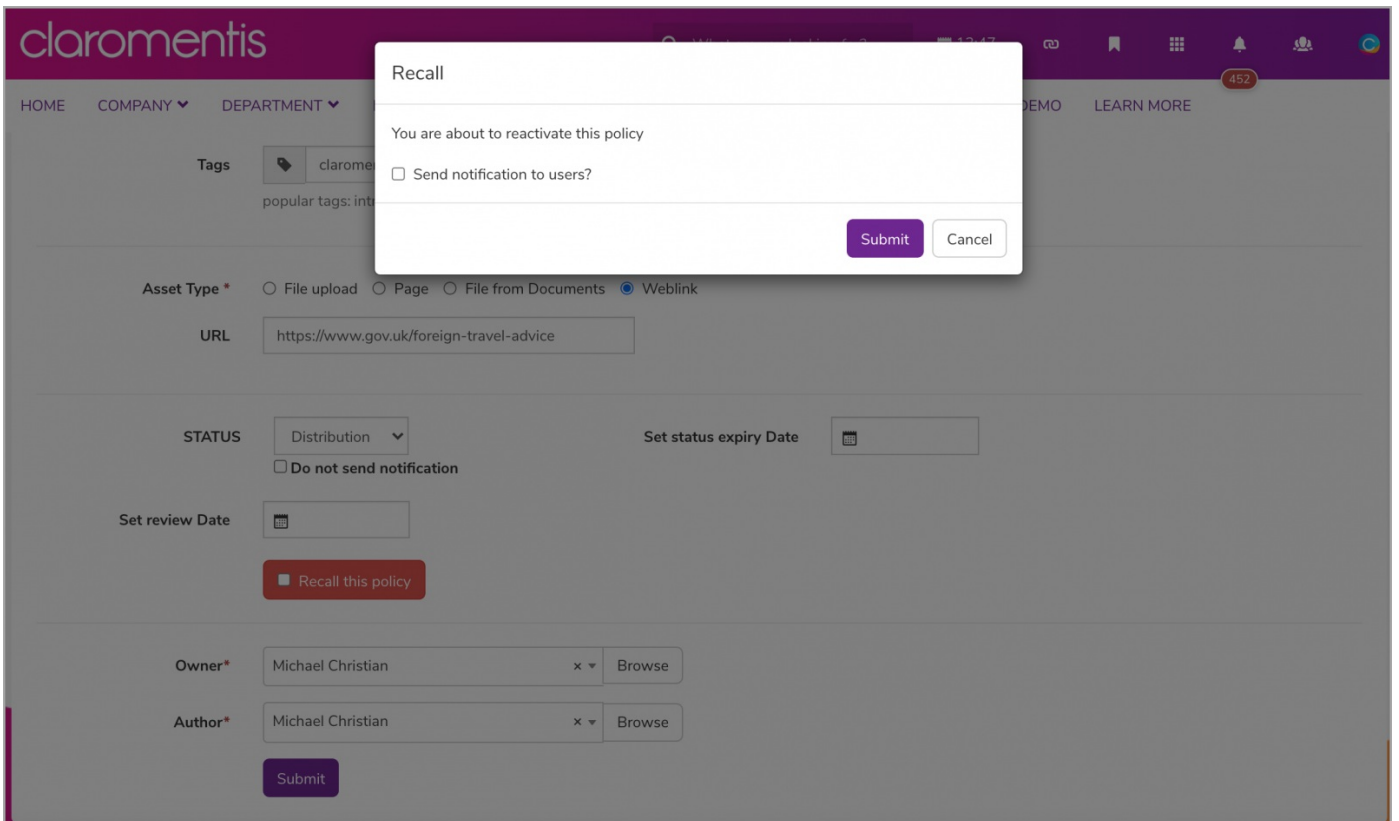
The screenshot shows the 'Policy Manager / Policy Details' page. At the top, there is a warning message: 'This policy has been withdrawn, and eventually admin will delete it or the new version will replace it.' Below this, the policy title is 'INS-0002 - Foreign travel advice' with a status of 'Distribution' and 'Policy version 1'. The description is 'Travel Advice from UK Government'. On the right side, there are three buttons: '+ Create New Version', 'Edit Properties', and 'Acceptance Status'. The 'Acceptance Status' button is highlighted with a red border.

## How to reactivate a policy

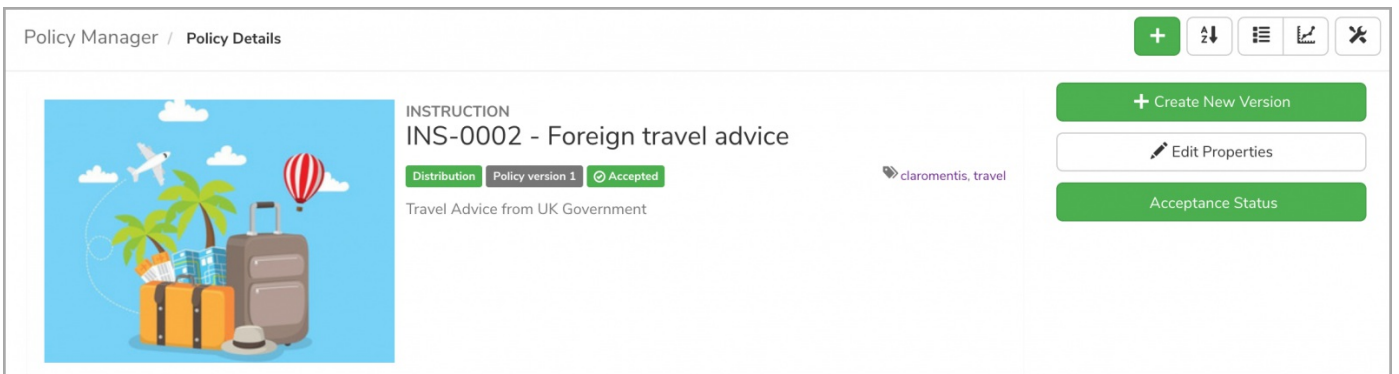
1. You can undo a recall on a policy by simply reactivating it. To do so, uncheck the 'Recall this policy' option and press 'Submit'

The screenshot shows the policy configuration form. The 'STATUS' is set to 'Distribution'. There is a 'Set status expiry Date' field. The 'Do not send notification' checkbox is unchecked. The 'Set review Date' field is empty. The 'Recall this policy' checkbox is checked, and a red arrow points to it, indicating it should be unchecked. The 'Owner\*' and 'Author\*' fields are both set to 'Michael Christian'. A 'Submit' button is at the bottom.

2. You will once again be prompted with the following message where you can (1) confirm the action and (2) choose to notify users of the reactivation.



3. As per the Distribution status, the policy will again be live and users will be allowed to accept the policy if required.



**Please note:** Reactivating a policy is not the same as renewing a policy. Reactivating a policy will only reinstate the policy to resume its original version.

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Last modified on 1 December 2023 by [Hannah Door](#)

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