

Reviewed and Revised Policy Report

Whenever changes are made to a policy, the person making the modifications will be required to leave a comment describing their actions. A report of all these summaries can easily be generated to provide to a surveyor as part of a review.

To begin, navigate to the Admin tab. Then, click the Reviewed and Revised link in the Reports column.

The generated report will automatically display policies with changes in the last 90 days. Filters can be applied to view only policies in the selected Areas or policies with changes after a certain date. Click the Filter Policies button to apply the filters, if you choose to use them.

The comments summarizing the changes made to policies as well as the date each policy was revised will be listed here.

This report can also be exported as a CSV file. CSV files open in spreadsheet programs like Microsoft Excel.

To export your report, click the Excel icon in the header.

Click the download link when your report is ready. How your report downloads may vary based on your local browser settings.