

Accepting or Rejecting Converted Documents

After submitting your files through the Implementation Dashboard and having them converted, the final step is to accept or reject the converted policy.

On the Home tab, click the header of the Policies Requiring Acceptance report. The resulting page will list all policies requiring acceptance after the conversion process.

Double-click an Area name to filter the policies if necessary.

Click a policy name to view the converted version. To compare it to the original document, click View File in the top blue bar.

If the policy reflects what you submitted, even if you have plans to change or retire the policy, click the Accept button.

If the policy does not at all reflect the original file, click the Reject tab. Review the directions to ensure rejection is the appropriate action.

Use the comment box to explain the rationale behind the rejection, then click the Reject button so our team can address the issue and resubmit the policy for acceptance.

Policies can also be accepted in bulk by clicking the checkboxes or clicking to select and accept all policies.