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# Managing Company Policies/Policy Acknowledgement

**Overview:** Open Enrollment can be a convenient time to roll out new policies that employees can view and/or acknowledge right in ADP while they are logged in to complete their Open Enrollment. Policies can be uploaded and scheduled to roll out in advance. ADP provides a convenient dashboard to track completion and send reminders as needed.

## To access this feature, go to Setup > Tools > Manage Policies

1. From the **Manage Policies** tab, click **Create New Policy**.
2. Enter the **Policy Properties**: Policy Name, Version and Policy Description.
   -

| **Field** | **Max # of Characters** |
|---|---|
| Policy Name | 130 |
| Version | 5 (example 1.0) |
| Policy Description | 400 (entry is optional) |

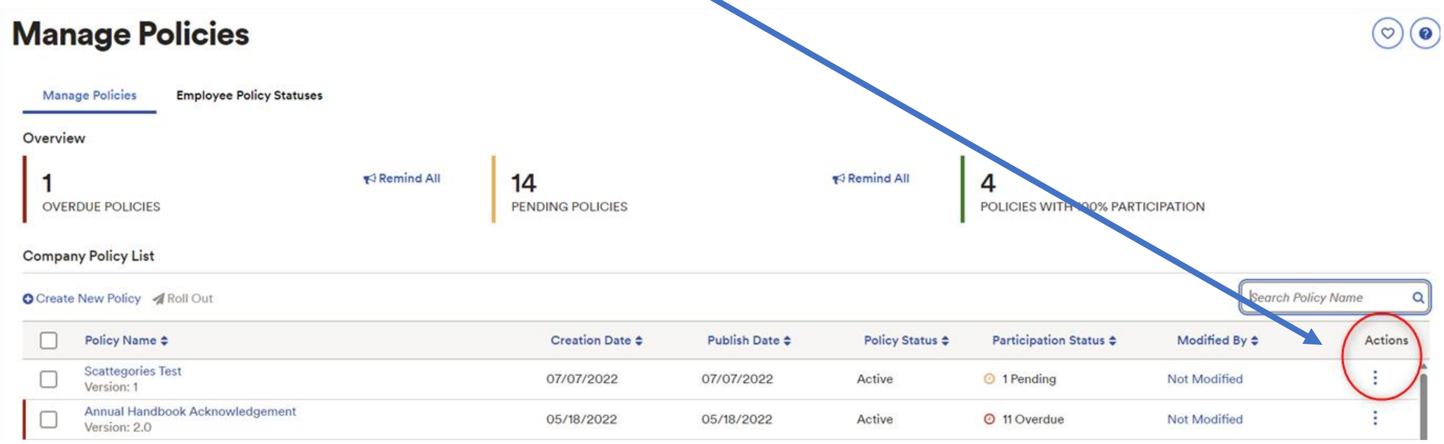
**Note:** The language field displays the client's default language.

4. In the **Content** area, select a file to upload or enter the hyperlink to access the policy.
   - Max file upload size is 24mb.
5. For **Acknowledgment**, choose if you want the policy acknowledgement to be required or not.
   - If an acknowledgment is required, you can create a **custom acknowledgment message** (max 250 characters).
6. Once complete, click **Next**
7. To setup policy properties for **Additional Languages**, expand the language needed, then complete the setup.
8. Click **Next**
9. **Review** the company policy, then select the "I agree…" check box.
10. You can **Save** your policy and roll it out later from the Manage Policies tab or **Save and Roll Out** your policy.

# Rolling out Policies

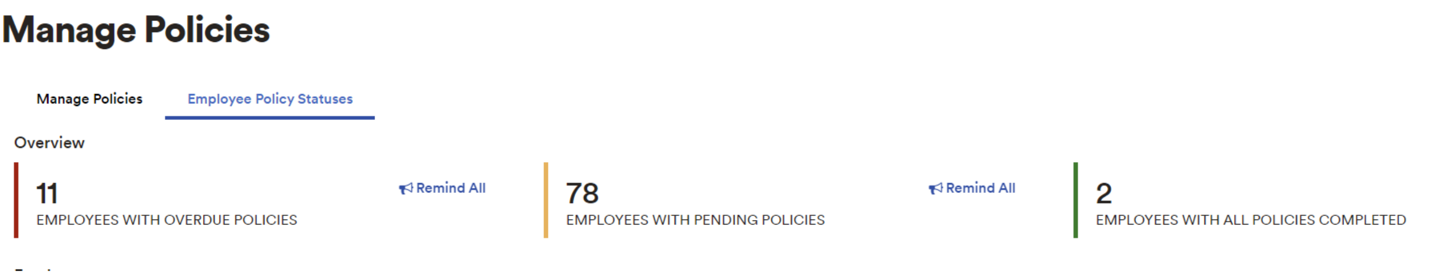
You can only roll out a policy with a policy status of **New** or edit the roll out of a policy with a policy status of **Pending** (publish date in future).

1. Access the Policy Roll Out page in one of the following ways:
   - From the Create New Policy **Review & Save** step, select **Save and Roll Out**.
   - On the **Manage Policies** tab, select the check box next to the name of the policy and click **Roll Out** or select roll out from the **Actions**




   - For policies with a policy status of **Pending**, click on the **Policy Name**, then click **Roll Out** to edit. Once you've completed the updates, click **Roll Out**, then **Close**.
2. If you have more than one policy you want to roll out for the same time frame and to the same group of people, click **Add Another Policy**, select the additional policies, then click **Confirm**.
3. Select the **Publish Date** (start date) and select if you want to set a **Due Date**. You can specify a specific due date, or you can select the rule-based date:
   - **Specific Date:** The due date is the selected calendar day. If an employee is added because of a security profile change, the due date remains the selected calendar date regardless of the time of the profile change.
   - **Rule-Based Date:** The due date is the selected number of days after the publish date. If an employee is added because of a security profile change, then the due date will be the number of days after the day they were added.
4. Select **Add Security Profiles** and choose who you want to send the policy or policies to.
5. Once you have selected the security profiles, click **Confirm**.
6. Click **Roll Out**. The policy status will show as **Active** or **Pending**, depending on the publish date (current or future).

# Checking Employee Policy Status




From the **Employee Policy Statuses** tab (Setup > Tools > Manage Policies), you can do the following:

- **View** the number of employees with overdue, pending, or completed policies
- **Search** for employees, or use **Filters** to see details for specific policies or employees
- Select employees and **send reminders** to those with either overdue or pending policies.
- Note: If you want to send a reminder to <u>all</u> employees with a pending policy, click **Remind All** in the **Employees with Pending** Policies tile located in the Overview section.
- **Export** the status details for all employees. Results are available under **My Exports**.
- **Fields included:** Company Code, Employee Name, User ID, Associate ID, Employment Status, Position ID, Job Title, Home Department, Location, Reports To, Policy Name, Policy Status, Due Date, Assigned Date, Required, Acknowledged Date, and Viewed (Yes/No).

# Running the Company Policy Acknowledgment Report

1. Access **Setup > Tools > Manage Policies**
2. Click on the **ellipsis** (actions) for the policy and select **View Status**
3. Check the box to select the employees, then click **Export**
4. Click **My Exports**, then click **download** to access the report

    - A list of previous exports is also available.

**Note:** For Managers, clients can set access to policy acknowledgement status reports for direct reports under **My Team > My Team > Company Policy Status**

# Viewing Policy Roll Out Setup

1. Access **Setup > Tools > Manage Policies**
2. Click the **Policy Name** or click on the **ellipsis** (actions) and select **View Policy**.
    - The view policy slider will display and content will be available for preview.
3. Click the **Roll Out** link.
    - On the **Policy Roll Out** slider, you can view **Publish and Due Dates** and **who** received the policy rollout.
    - If the policy was previously rolled out, you will see this message: This is a previously distributed policy so you can not make any changes to the roll out.

# Employee Experience

Employees can identify all policies that require their acknowledgement and which policies they have acknowledged or not acknowledged.

To view & acknowledge policies there are two ways to access:

**1. Resources > Company Information > Company Policies**

- In the **Pending Policies** area, click a Policy Name.
- If the policy is available in multiple languages, select the language.
- Read the policy, and then click **Acknowledge**.
- Select the "I certify that I have read the policy" check box.
- Click **Acknowledge**. The policy will move to the **Completed Policies** area.

**2. Things to Do > Tasks**

- Employees can complete the task to acknowledge the policy by using the ADP Mobile app or Workforce Now.