
POLICY MANAGEMENT WORKSHEET

Policy-review template

Document change, review, approval and communication completely.

SIX REVIEW AREAS

1 **Review identity · Scope and affected parties**

2 **Change inputs · Content decision**

3 **Approval · Communication and next review**

Four pages · ready to complete · one copy per case

Document one complete policy review.

Use the prompts as meeting notes or transfer them into your policy system. Attach the concrete reviewed version and supporting evidence.

1. REVIEW IDENTITY

Identify the review and the concrete policy version.

☐ Policy title, identifier and current version:

☐ Policy owner and review coordinator:

☐ Review date, reason and target decision date:

OWNER

DUE DATE

STATUS

NOTES AND NEXT ACTION

2. SCOPE AND AFFECTED PARTIES

Clarify where the policy applies and who is affected.

☐ Entities, locations, teams, processes or systems in scope:

☐ Internal and external audiences affected:

☐ Connected procedures, contracts, controls or policies:

OWNER

DUE DATE

STATUS

NOTES AND NEXT ACTION

Document one complete policy review.

3. CHANGE INPUTS

Record what triggered or informed the review.

- ☐ Regulatory, contractual or normative changes considered:
- ☐ Risk changes, incidents, audit findings or exceptions considered:
- ☐ Feedback, usage evidence or effectiveness signals considered:

OWNER	DUE DATE	STATUS
NOTES AND NEXT ACTION		

4. CONTENT DECISION

Describe changes and unresolved questions.

- ☐ Material changes proposed and their reason:
- ☐ Sections confirmed without change:
- ☐ Open questions, dependencies and responsible follow-up:

OWNER	DUE DATE	STATUS
NOTES AND NEXT ACTION		

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5. APPROVAL

Make the version decision explicit.

☐ Decision: approve unchanged / approve revised / return for work:

☐ Approver, decision date and any qualification:

☐ Approved concrete version and effective date:

OWNER

DUE DATE

STATUS

NOTES AND NEXT ACTION

6. COMMUNICATION AND NEXT REVIEW

Turn approval into an operating policy.

☐ Affected audiences and communication channel:

☐ Acknowledgement, training or implementation action required:

☐ Next review date, trigger and responsible owner:

OWNER

DUE DATE

STATUS

NOTES AND NEXT ACTION