



Review and Accept Plans

When a management plan is created due to a conflict, it is important that you understand the plan and agree with the steps that have been documented. Users will receive a notification when a management plan has been routed for review. Log on to the system and navigate to your Disclosure Profile to complete the review.

To review and accept the management plan

1. On the disclosure workspace, click **Review and Accept Plans**.

	Action Required	İ
Dis con 11/2 Trai 11/2	closure profile last npleted: 24/2020 ining last completed: 23/2020 Your training has expired	
V	Complete Disclosure Profile Update	
•	Review and Accept Plans	

2. Click **Update** next to the management plan that you want to review. **Note:** There may be multiple management plans to review.

view and Accept Plans	
1. Management Plans	Edit Management Plan Document Information
ピ Update Mana	1. Management plan document: Managment Plan for Bob Smith.docx(0.01) ···
Update Cert	2. Date of plan creator's comments: 1/13/2021
2. Comments:	 Comments from plan creator: Here's your management plan. Review and accept the management plan. Supporting documents from plan creator:
	Name There are no items to display
	5. * Do you accept this plan? ② O Yes O No <u>Clear</u>
	* Required OK Cancel



- 3. Click the management plan document to review the details of the management plan.
- Select Yes to accept the management plan. Alternatively, select No if you need to clarify the details of the management plan or suggest edits to it.
 Note: If you select No, then you have to provide a reason for not accepting the management plan. You can also upload documents to indicate the reason.
- 5. Click **OK**.