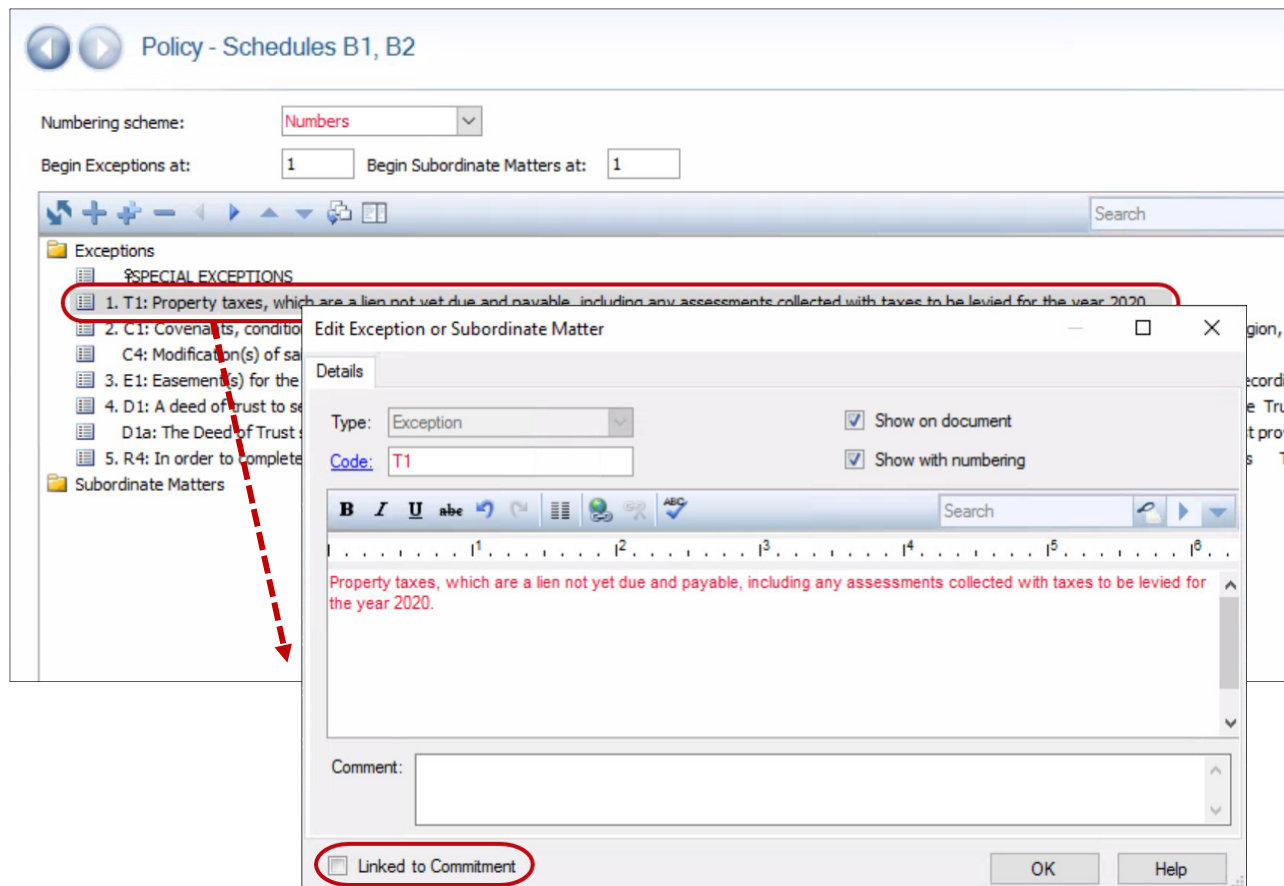Populating the **Policy - Schedules B1, B2** screen using the **Start Policy** icon, provides the ability to link the Policy exception or subordinate matter to the Commitment exception or subordinate matter. This allow edits to be made on the **Commitment Schedule B1, B2** screen while simultaneously adding the edits to the **Policy – Schedule B1, B2** screen.
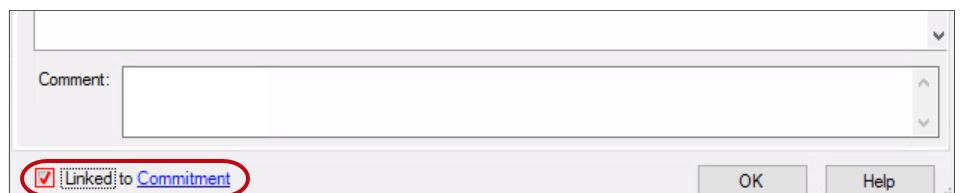
Follow these steps to link policy exceptions to their related commitment exceptions and requirements.

To link an exception,

1. Double-click the entry you wish to link

2. From the **Edit Exception or Subordinate Matter** window, check the **Linked to Commitment** check box

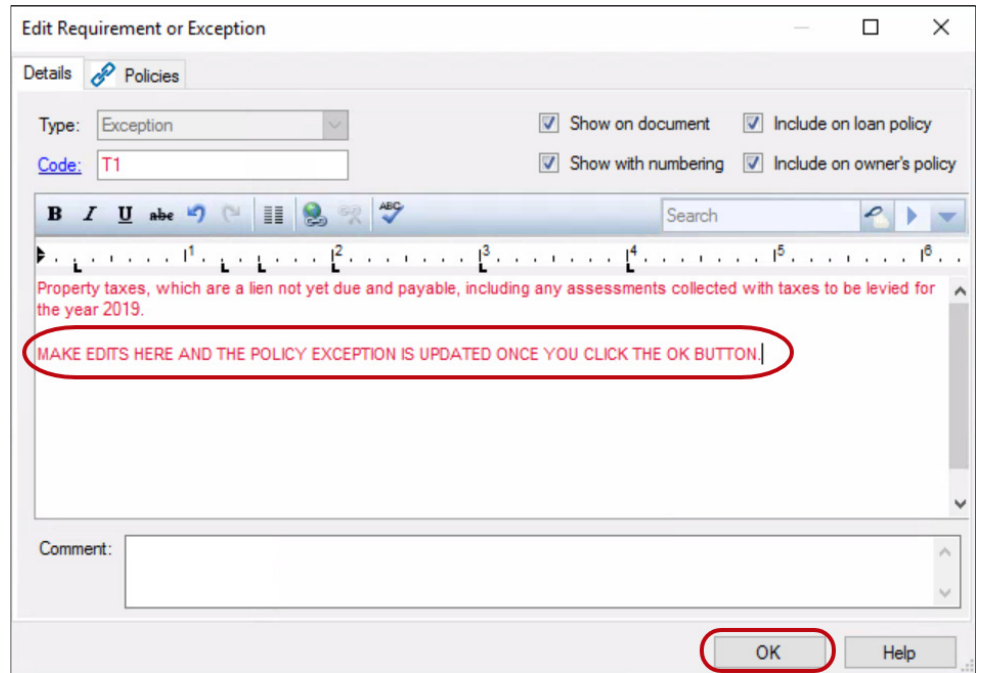The **Linked to Commitment** now has an active hyperlink to the Commitment.

3. Click the **Commitment** link to open the corresponding Commtiment exception in edit mode
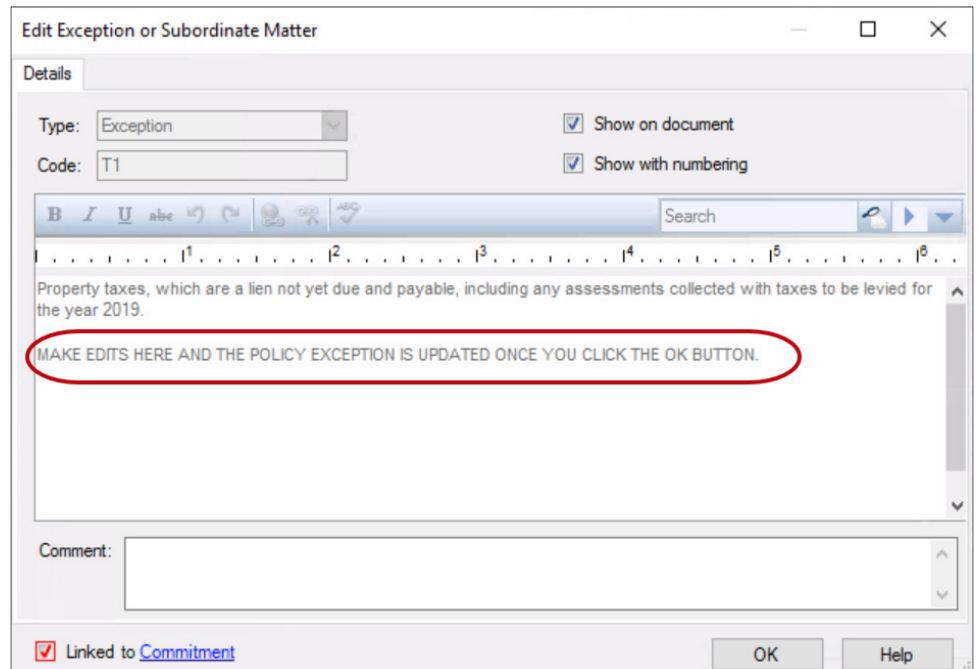
4. Make edits as needed

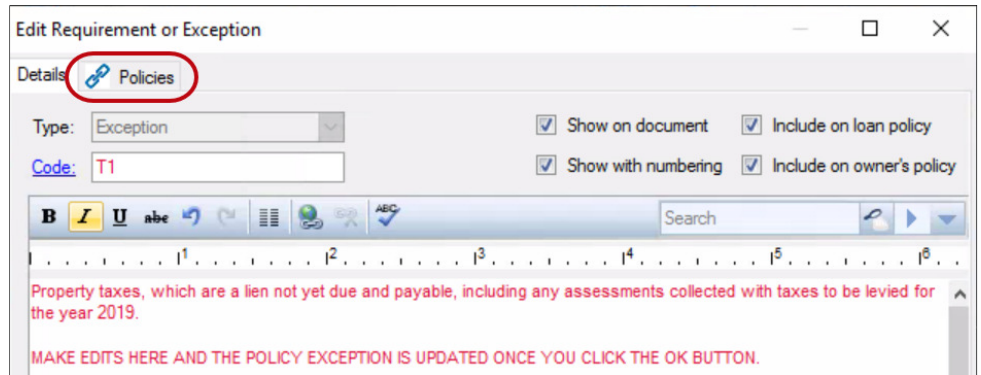5. Click the **OK** button to return to the Policy exception

The **Policy Edit Exception or Subordinate Matter** window now shows the edits made to the corresponding Commitment exception.

NOTE: Uncheck the **Linked to Commitment** check box if you no longer want them linked. This allows you to edit the Commitment exception, but the update does **not** flow to the Policy exception. It also allows you to edit the Policy exceptions to be different from the Commitment exception.

If you decide you want to link them again, check the **Linked to Commitment** check box again, and edits flow to the Policy exceptions again.

Once a **Commitment – Schedule B1, B2** exception is linked the **Edit Requirement or Exception** window shows a **Policies** tab.
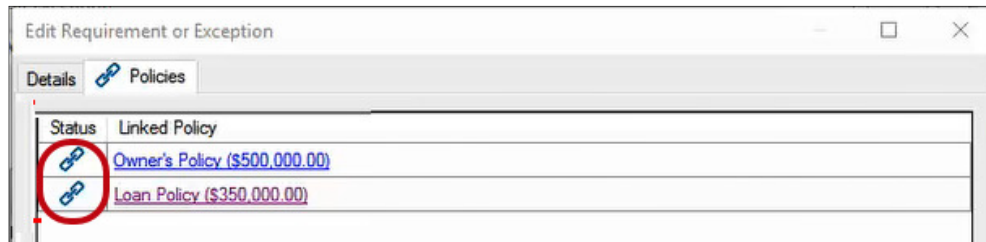

The **Policies** tab shows,

> = Exception is linked to the policy
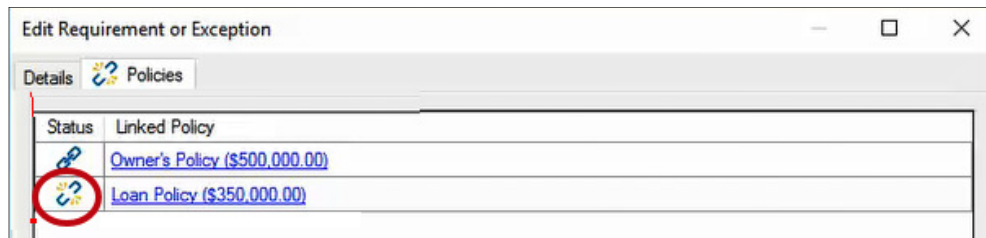
> = Exception is not linked to the policy

If you have more than one policy that has the same exception, the **Policies** tab shows,

> All exceptions are linked in all policies

> At least one exception is not linked to at least one policy