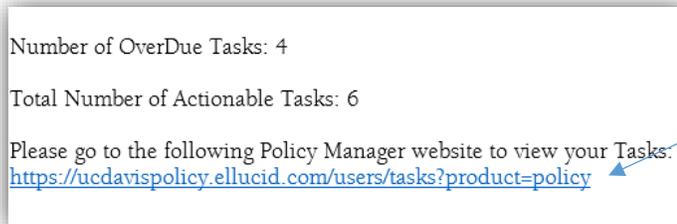


Approving a Policy

1. The policy management system will send a weekly email with your assigned tasks.
2. Click on the link in the email to navigate to your Tasks in the system.

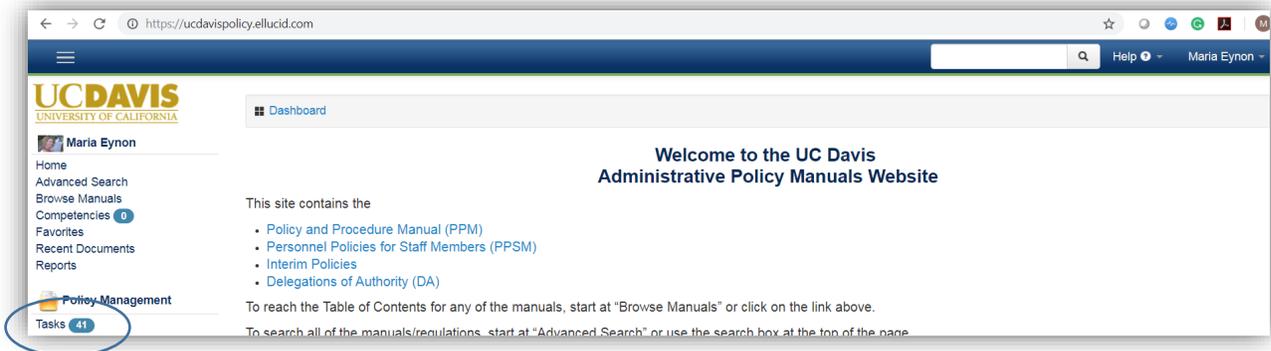


- a. If you are not already logged in, Select Login with SSO from the homepage.



Use your UC Davis credentials to login through the Central Authentication Service (CAS).

- b. You can also access Tasks from the homepage.



3. Find the policy requiring review in the list and select **View** to access the document.

Task Filters

- Display Only Actionable Tasks
- Display Only Tasks That Are Overdue
- Display Only Tasks Where Task Start Date Is From To

Tasks

Filter Results: 123 Showing 1 to 1 of 1 entries (filtered from 6 total entries)

Document Name	Your Task	Current Task	Task Start	Task Due	Status	Checked Out
Policy 123-45	6 - Final Approval	6 of 6	05/05/2018	05/19/2018	Overdue	View

Copy CSV PDF Print Export all

4. Review the Policy draft, and when you are ready to submit your approval, click the **Approve** button.

Policy 123-45 Due: May 19, 2018

Path: / Manuals / Test Manual

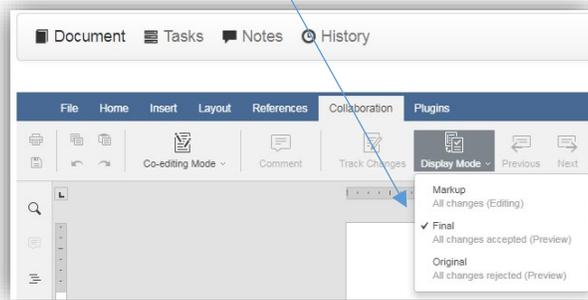
Task 6 of 6: Final Approval - Please review for final approval. Clicking the Approve button will send the policy to the Policy Office for final cleanup before posting online.

Document Tasks Notes History Help Email Checkout Approve Reject

UC Davis Policy and Procedure Manual

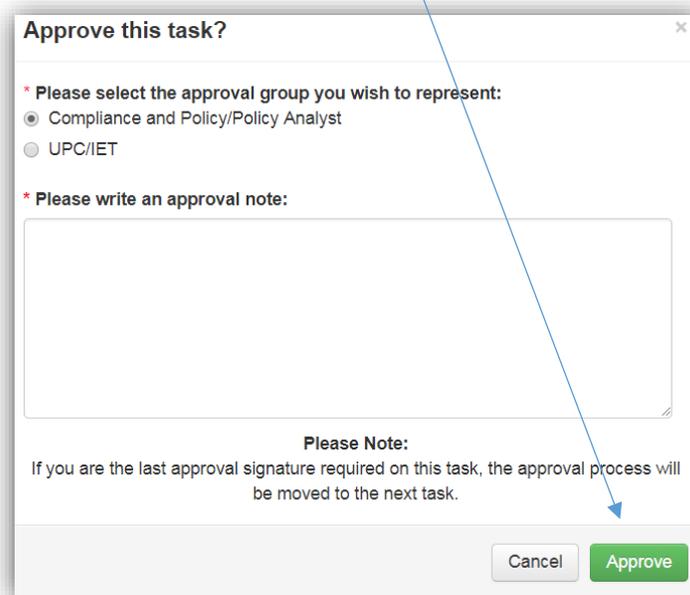
Chapter 100, UC Organization
Section 15, UC Administrative Structure
Date: 9/2/03
Supersedes: 6/1/00
Responsible Department: N/A
Source Document: N/A

- To view the document draft without the tracked changes showing, select the Collaboration tab, Display Mode, Final All changes accepted (Preview).

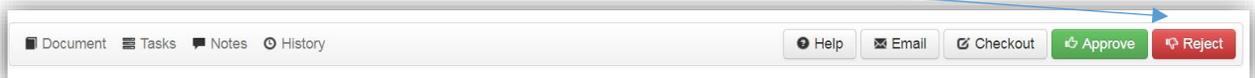


Note: Additional changes cannot be made in this view.

- Enter a note in the text box and select **Approve**.



- If there are additional changes that need to be made by the Policy Owner prior to approval, select **Reject**



8. Select the **Policy Owner Approval** step to reject the task back to the Policy Owner to make additional changes, enter a rejection note with your comments, select **Reject** to send the task back.

Reject this task? ✕

Both a step and a note are required.

Please select a step number to reject to:

- Step 1: Initial Draft Creation/Review
- Step 2: Policy Office Review Prior to Formal Review
- Step 3: Formal PPM Review
- Step 4: Policy Office Comment Review
- Step 5: Policy Owner Approval

Please write a rejection note:

Need to add requirements in section III.A to align with current practice.

Do you wish to send this approval process back to the selected step?

A confirmation message will appear when the document has been rejected.