Policy Approvers: Providing Final Policy Approval

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.

   Number of OverDue Tasks: 4
   Total Number of Actionable Tasks: 6
   Please go to the following Policy Manager website to view your Tasks:
   https://ucdavispolicy.ellucid.com/users/tasks?product=polcy

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

   Use your UC Davis user name, and the generic “password” in the password field the first time you login. You will be prompted to change your password upon successfully logging in with “password”.

   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.

4. Review the Policy draft, and when you are ready to submit your approval, click the Approve button.
5. 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.

6. Enter a note in the text box and select Approve.

7. 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.

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