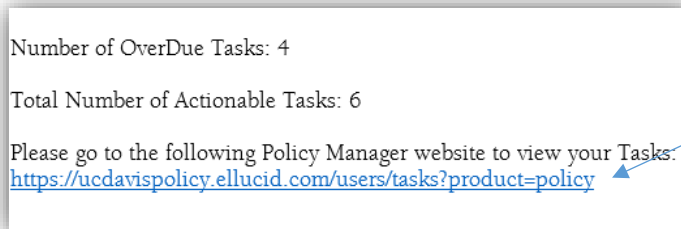
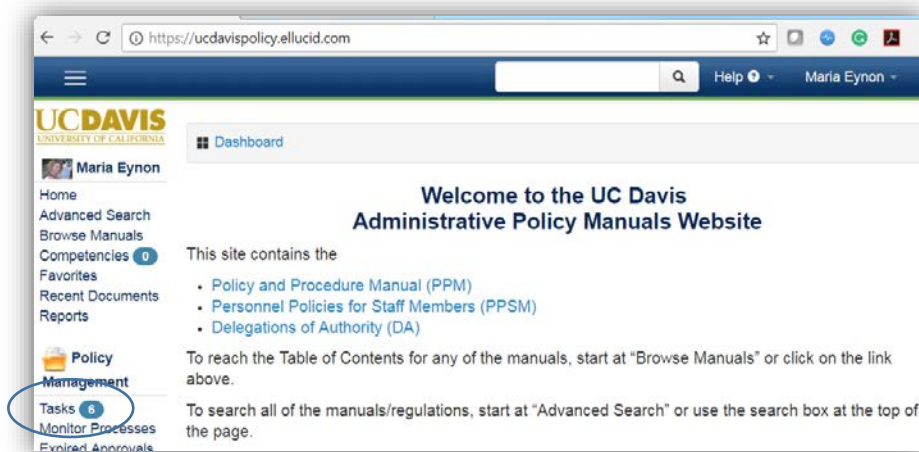


Four-Year Cycle Updates

1. The policy management system will send you a weekly email with your assigned tasks when your policy is due for update.
2. Click on the link in the email to navigate to your **Tasks** in the system



- a. If you are not already logged in, the system will take you to the login screen. Use your UC Davis credentials to log in.
- 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

Apply

Tasks

Filter Results: 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	
Development and Management of Campus Administrative Policies	3 - Formal PPM Review	3 of 7	05/18/2018	06/01/2018	Current		View

Copy CSV PDF Print Export all

4. Select **Checkout** to make changes.

Development and Management of Campus Administrative Policies Due: Jun 1, 2018

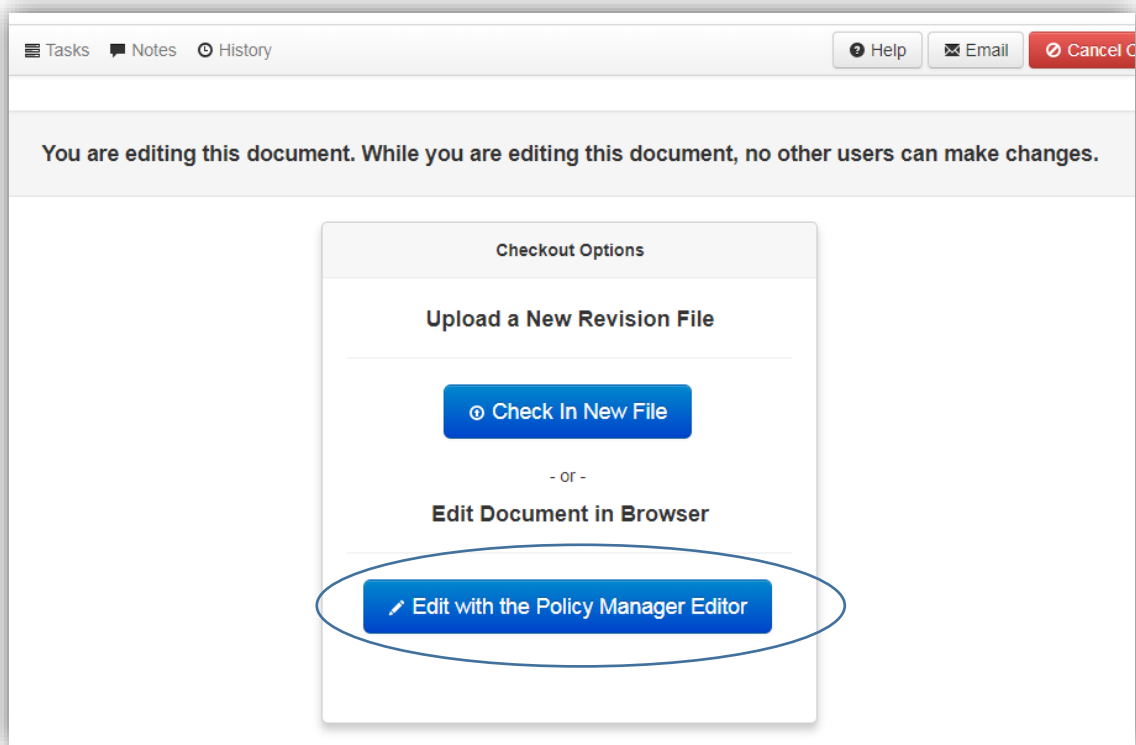
Path: / Manuals / Policy and Procedure Manual (PPM) / Introduction

Task 3 of 7: Formal PPM Review - Please review the policy and make any suggested edits or comments directly to the document online. No response by the deadline will be interpreted as your concurrence with the proposed manual section. Reviewers' comments and suggestions will be compiled, and I will work with the policy/process originator to resolve any issues. Once the comments are reconciled, I will prepare a final draft for approval by the originator, the department head and the appropriate vice chancellor or vice provost prior to publication. Contact Maria Eynon (meynon@ucdavis.edu) with any questions.

Document Tasks Notes History **New Note** Help Email **Checkout** Approve Reject

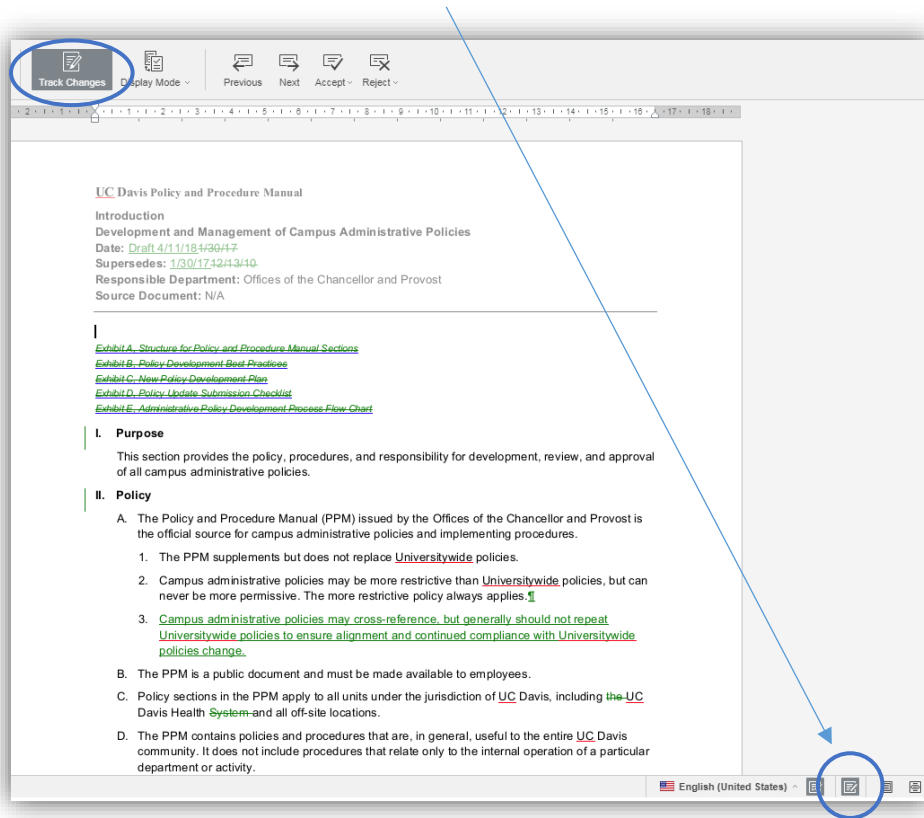
UC Davis Policy and Procedure Manual
Introduction
Development and Management of Campus Administrative Policies
Date: [Draft 4/11/18 4:00:47](#)
Supersedes: [1/30/17 4:24:34](#)
Responsible Department: Offices of the Chancellor and Provost
Source Document: N/A

5. Select **Edit With the Policy Manger Editor** to open the document in the inline editor.



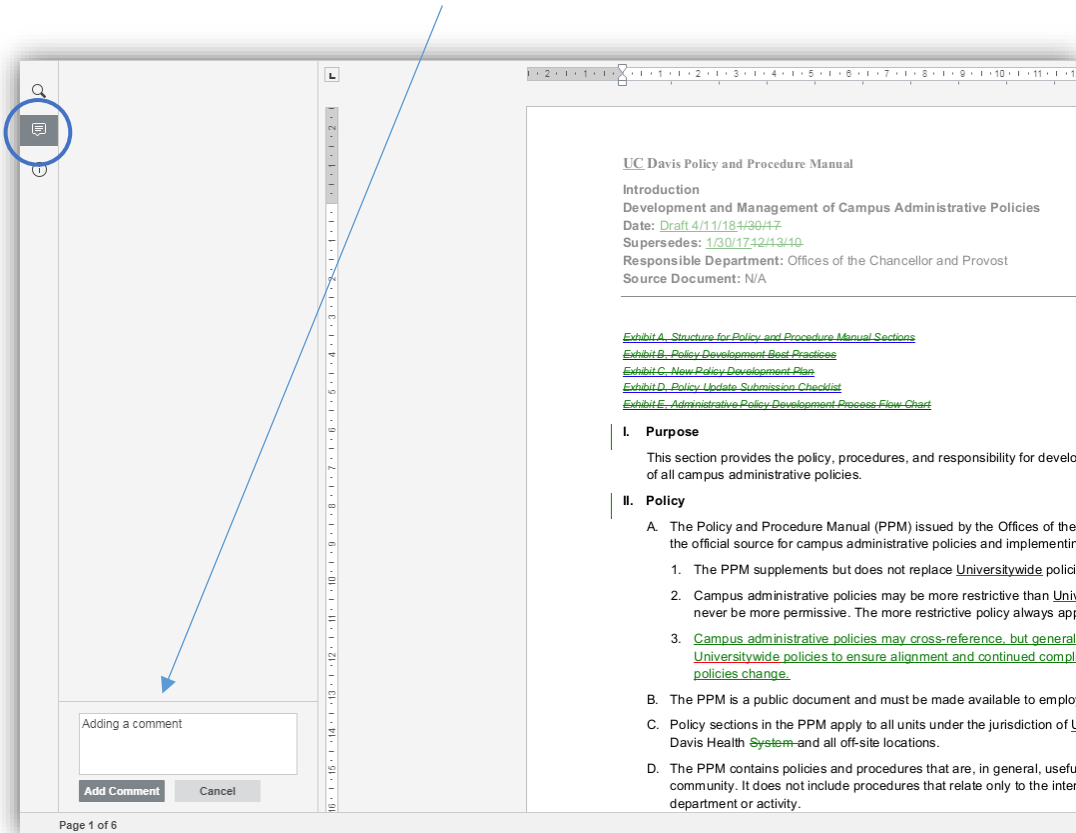
- a. Do not check in a new file without consulting with the Policy Office first.

6. Check to make sure the Track Changes mode is enabled.



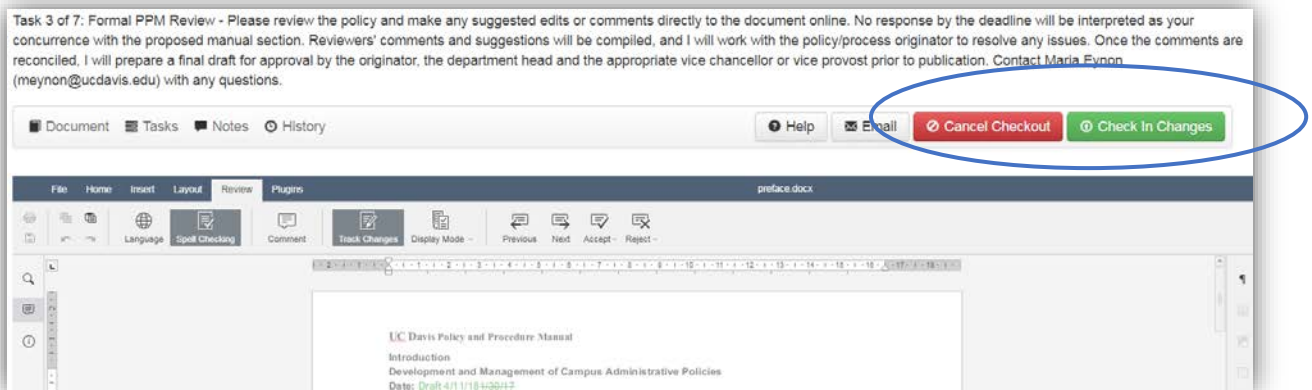
7. If it is not enabled, click either of the Track Changes buttons.

8. Enter your changes directly in the document in the system.
 - a. Comments can be added to the document by selecting **Comments**, then selecting **Add Comments to Document**.



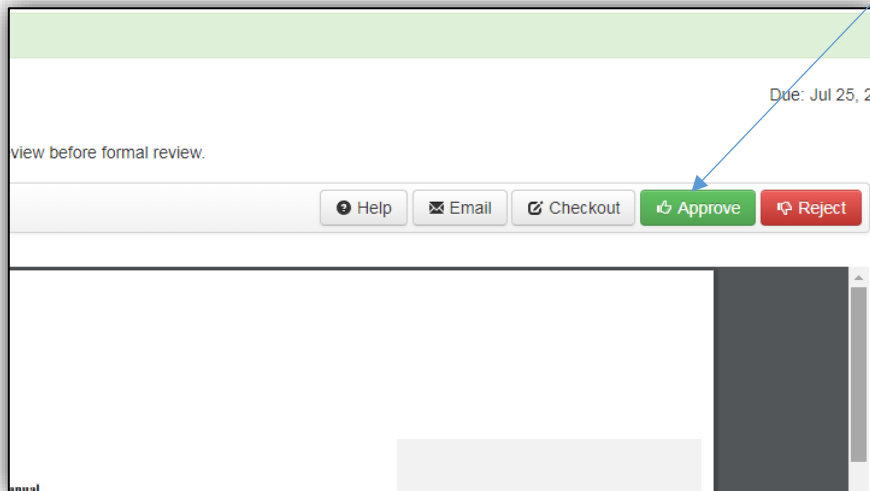
- b. Note that updates to numbering in the document will not appear while you are editing the document.

9. When you have completed your edits, select **Check in Changes**.

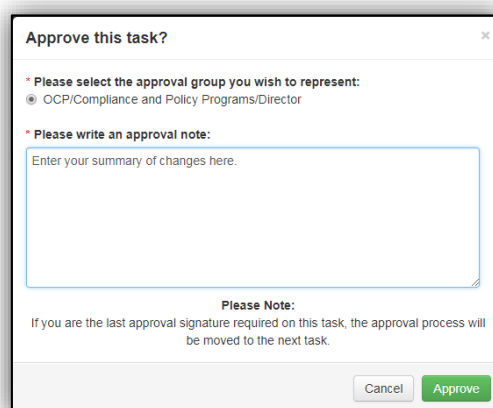


10. If you need to close the document without saving changes, select **Cancel Checkout**.

11. When you are ready to submit the policy into the review process, click **Approve**.



12. Enter a summary of your changes in the text box and select **Approve**.



Off-Cycle Updates

1. Contact the Policy Office to request initiation of an update to a policy outside of the four-year cycle.
2. The Policy Office will initiate the update/approval process in the system, and send you an email with a link to your task in the system.
3. Follow the procedures included in [Four-Year Cycle Updates](#) above.

Initiating a New Policy

1. Submit a [Policy Development Plan form](#) to the Policy Office to request initiation of a new policy.
2. The Policy Office will review the request, and if it is approved for inclusion in the PPM, activate a policy template, and send you an email with a link to your task in the system.
3. Follow the procedures included in [Four-Year Cycle Updates](#) above.