

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

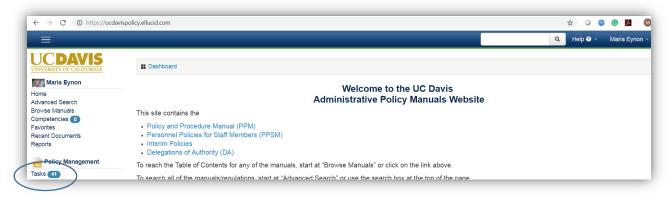


a. If you are not already logged in, Select Login with SSO from the homepage.

≡		Q Help 🛛 -	Guest User 👻
UCDAVIS UNIVERSITY OF CALIFORNIA Guest User Home Advanced Search	# Dashboard Welcome to the UC Davis Administrative Policy Manuals		
Browse Manuals Login with SSO	This site contains the following manuals maintained by the Administrative Policy Office in the Office of Compliance and Policy: Policy and Procedure Manual (PPM) Personnel Policies for Staff Members (PPSM) Interim Policies Delegations of Authority (DA)		

Use your UC Davis credentials to login.

b. You can also access Tasks from the homepage.



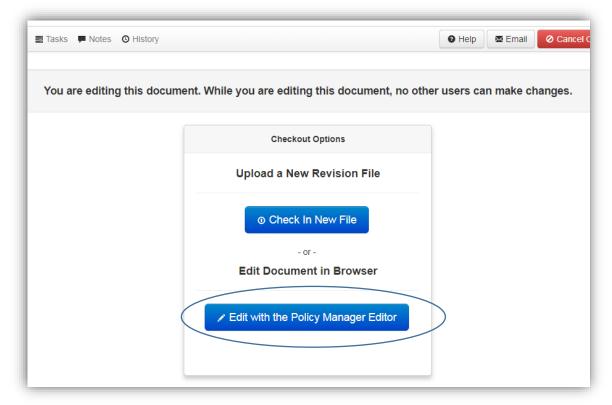
3. Find the policy requiring review in the list and select **View** to access the document.

Task Filters		
 Display Only Actionable Tasks Display Only Tasks That Are Overdue Display Only Tasks Where Task Start Date • 	Is From To To	
Apply Tasks O		
Filter Results: developmen(Showing 1 to 1 of 1 en	ries (filtered from 6 total entries)	Show 25 • entries First Prev 1 Next Last
Document Name Development and Management of Campus Administrative Policie		ask Start Task Due Status Checked Out Status Checked Out View View
Copy CSV PDF Print Export all		First Prev 1 Next Last

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

				٩	Help 🧿 👻	Maria Eynon -
Path: / Manuals / Policy and Procedure Manual (PPM) Task 3 of 7: Formal PPM Review - Please revie concurrence with the proposed manual section	ent of Campus Administrative Policies / Introduction w the policy and make any suggested edits or comments directly to th . Reviewers' comments and suggestions will be compiled, and I will wa al by the originator, the department head and the appropriate vice characteristics	ork with the policy/p	rocess origina	ator to resolve ar	iy issues. Once	
🛢 Document 🗮 Tasks 🗭 Notes 🗿 His	tory [] New Note	Help	🖾 Email	Checkout	🖒 Approve	Reject
in D D S R	C Davis Policy and Procedure Manual troduction evelopment and Management of Campus Administrative Policies at: <u>Cand 4111420427</u> aperades: <u>TSOPT24014310</u> asponsible Department: Offices of the Chancellor and Provost surce Document: N/A					

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

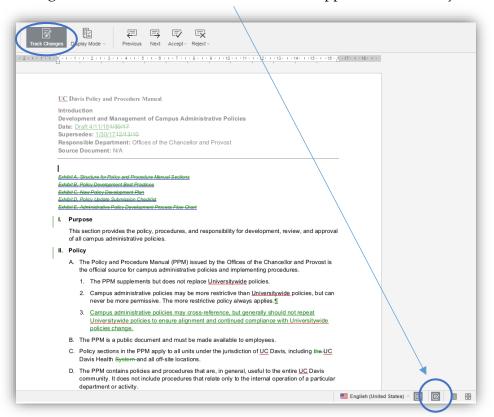


a. Do not check in a new file (upload) without consulting with the Policy Office first.

6. Select the Collaboration tab.



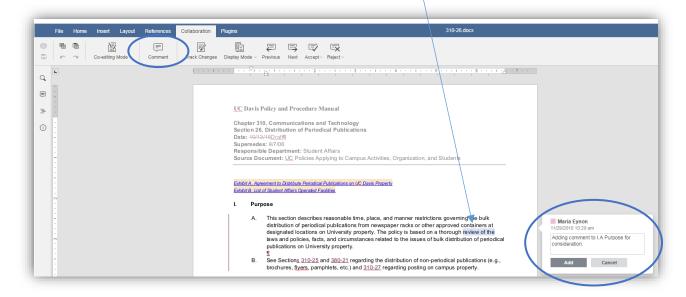
7. Ensure that the Track Changes function is turned on prior to making edits to ensure all changes made are tracked for Reviewers and Approvers to identify.



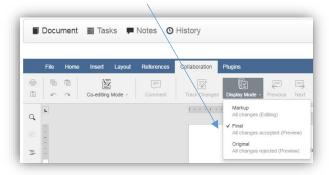
8. To enable **Track Changes**, select either of the **Track Changes** buttons. The track changes button at the top of the document can be accessed in the **Collaboration** tab.

- 9. Enter your changes directly in the document in the system.
 - a. Comments can be added to the document by highlighting text, selecting **Comment** from the **Collaboration** tab, adding text to the comment box, then selecting Add.

Note: To view or respond to other comments when the draft is check out, click on highlighted text.



- b. Updates to numbering and formatting in the document are made through the **Home** tab.
- c. To view the document 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.

10. When you have completed your edits, select **Check in Changes** to save them and allow other users in the approval flow to access the draft and make changes.

non@ucdavis.edu) with any que	stions.			
Document 📑 Tasks 🗭 Note	es 🗿 History	🛛 Help 🖉 Email	⊘ Cancel Checkout 🛛 💿 🤇	Check In Changes
File Home Insert Layout Refe	rences Collaboration Plugins	380-08.docx		
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11. If you need to close the document without saving changes, select Cancel Checkout.

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

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view before formal review.		
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13. Enter a summary of your changes in the text box and select **Approve**.

Approve this task?			×
* Please select the approva OCP/Compliance and Po		sent:	
* Please write an approval			
Enter your summary of cha	nges here.		
	Please Note:		
If you are the last approval	signature required on this ta be moved to the next task.	isk, the approval process wil	
		Cancel Approve	

Note that you are not approving the final version for release but the initial draft. The Policy Office will work with you to finalize the draft prior to sending it for formal review to campus stakeholders.

14. To print or share/email a revision of the document, navigate below the document **Notes**, select **Revision Added** to download the document with all the comments and changes tracked included.

Document 📰 Tasks	s 🗭 Notes 🧿 History	O Help	🖾 Email	C Checkout	Approve	
3 🖌 Formal PPM Rev						
4 💉 Policy Office Com	iment Review					
5 Policy Owner, Approval						
6 🖋 AVC/Unit Head Approval						
7						
Notes						
	Enter a new note here:					
				Save Note		
Document check out canceled by Maria Eynon (meynon) — Maria Eynon (meynon) (09/11/2018 03:27:41PM PDT)						
Document checked out by Maria Eynon (meynon) — Maria Eynon (meynon) (09/17/2018 03:07:43PM PDT)						
	Document checked out by Maria Eynon (meynon) — Maria Eynon (meynon) (09/17/2478 03:07:34PM PDT)					
Revision Added:	330-80.docx					

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 <u>Policy Development Plan form</u> 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.