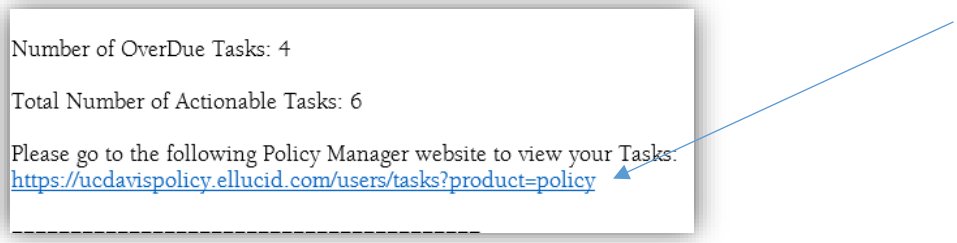
Policy Owners: Submitting Policy Updates

Four-Year Cycle Updates

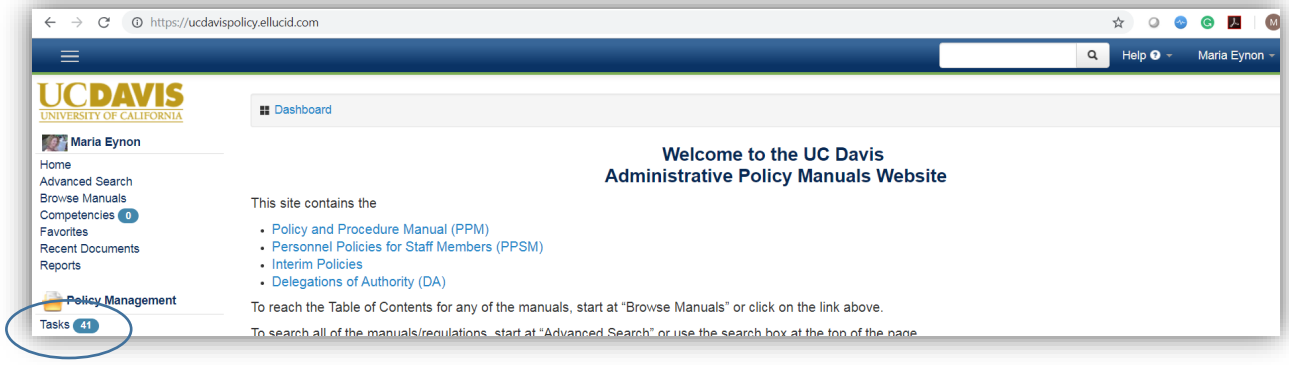
1. The policy management system will send you a weekly email with your assigned tasks when your policy is due for update.
2. Click on the link in the email to navigate to your Tasks in the system



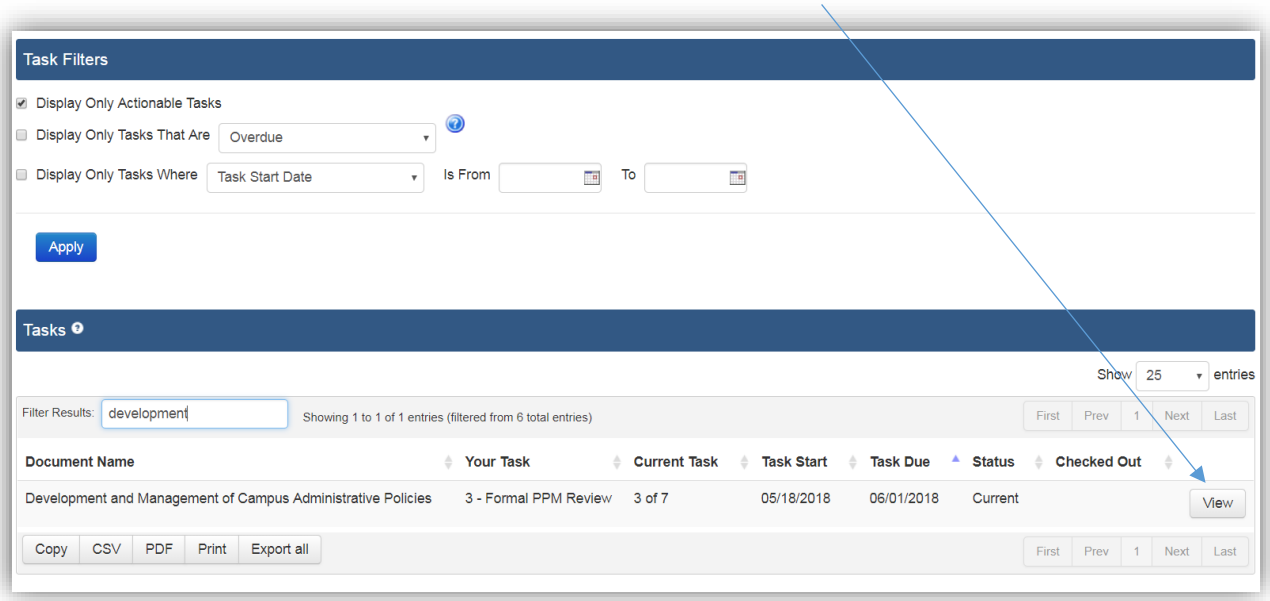
   a. If you are not already logged in, Select Login with SSO from the homepage.

   Use your UC Davis credentials to login.

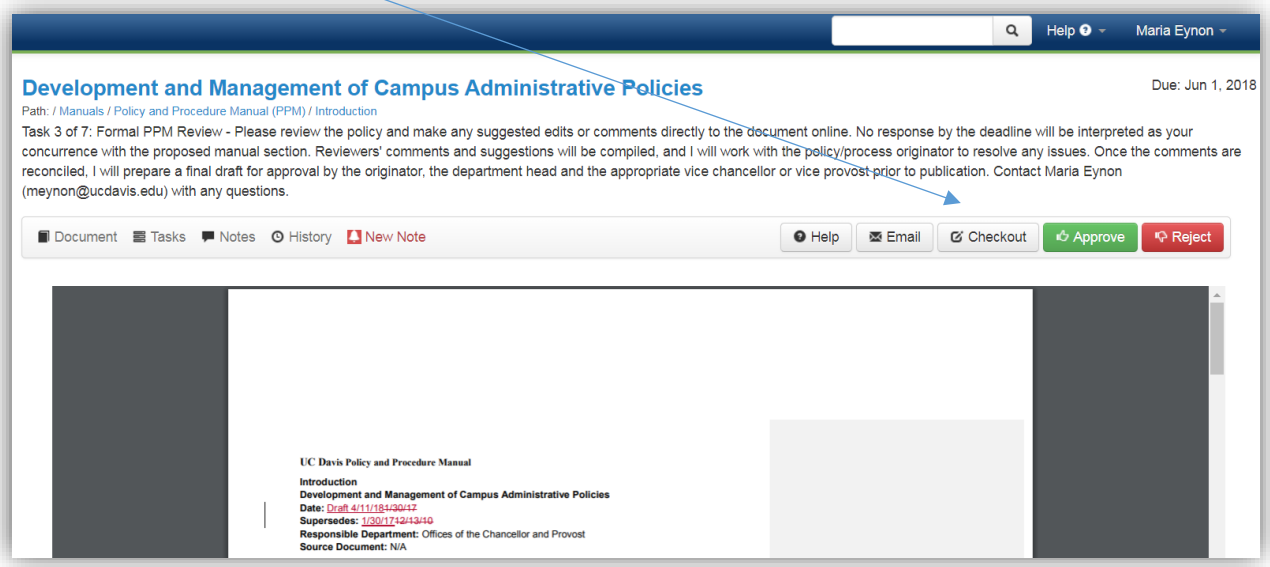
   b. You can also access Tasks from the homepage.



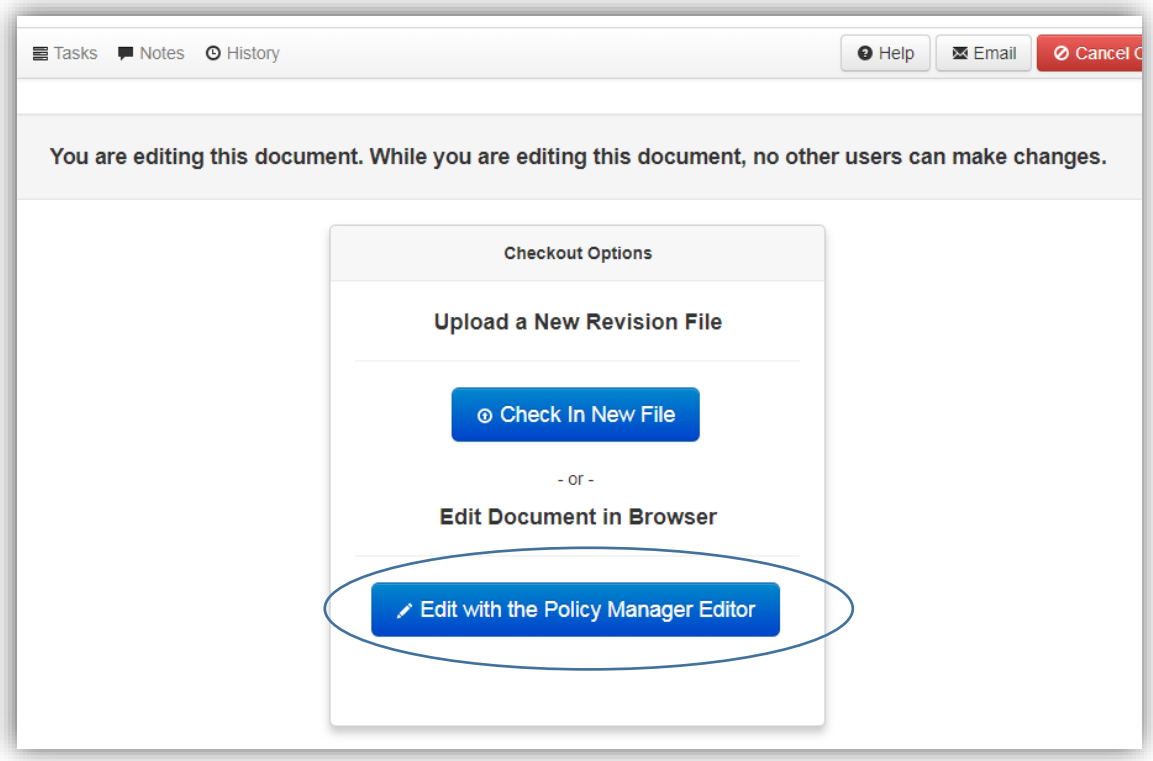
3. Find the policy requiring review in the list and select **View** to access the document.



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

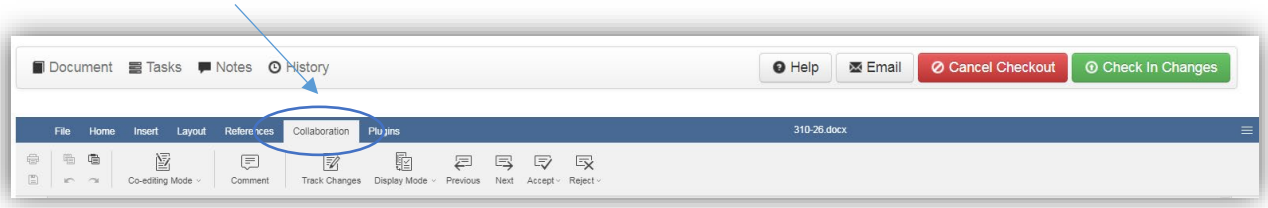


5. Select **Edit With the Policy Manger Editor** to open the document in the inline editor.

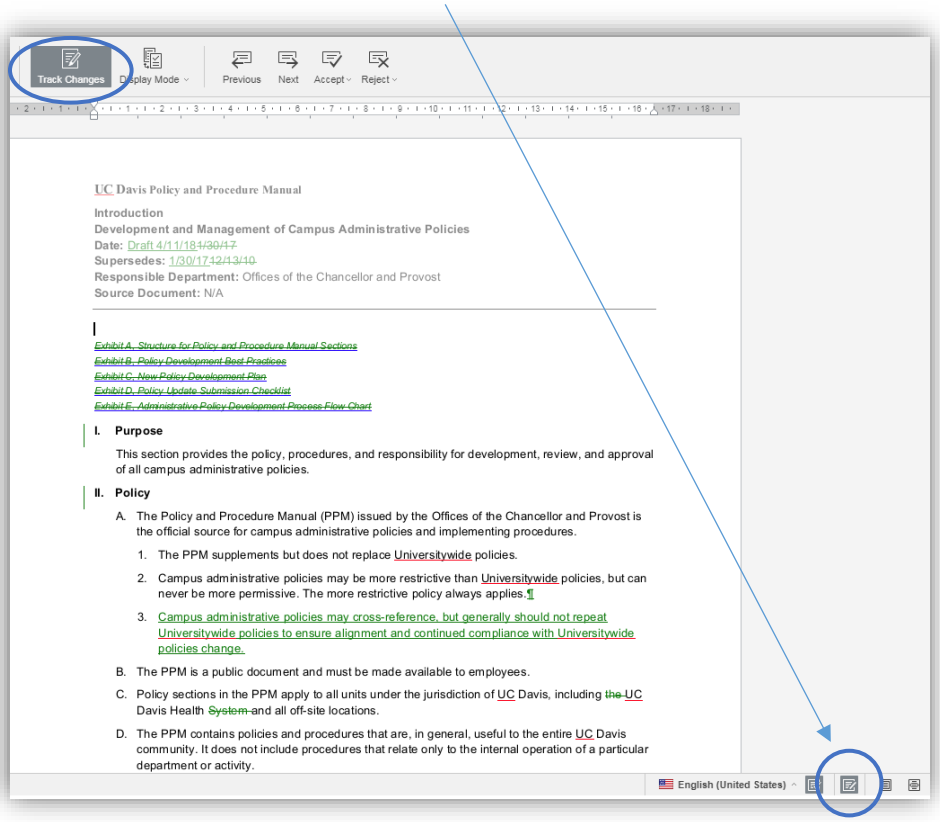


   a. Do not check in a new file (upload) without consulting with the Policy Office first.

6. Select the Collaboration tab.



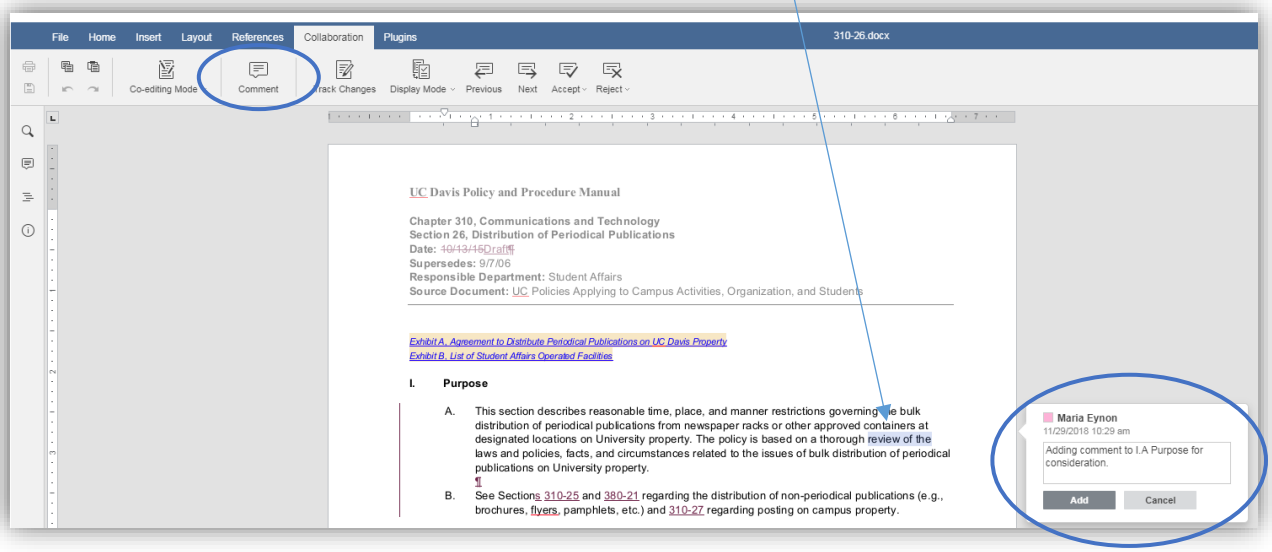
7. Ensure that the Track Changes function is turned on prior to making edits to ensure all changes made are tracked for Reviewers and Approvers to identify.



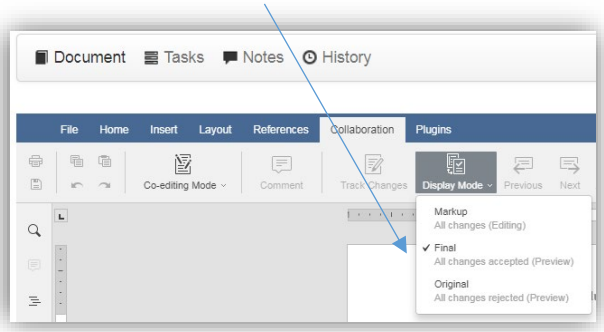
8. To enable Track Changes, select either of the Track Changes buttons. The track changes button at the top of the document can be accessed in the Collaboration tab.

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.

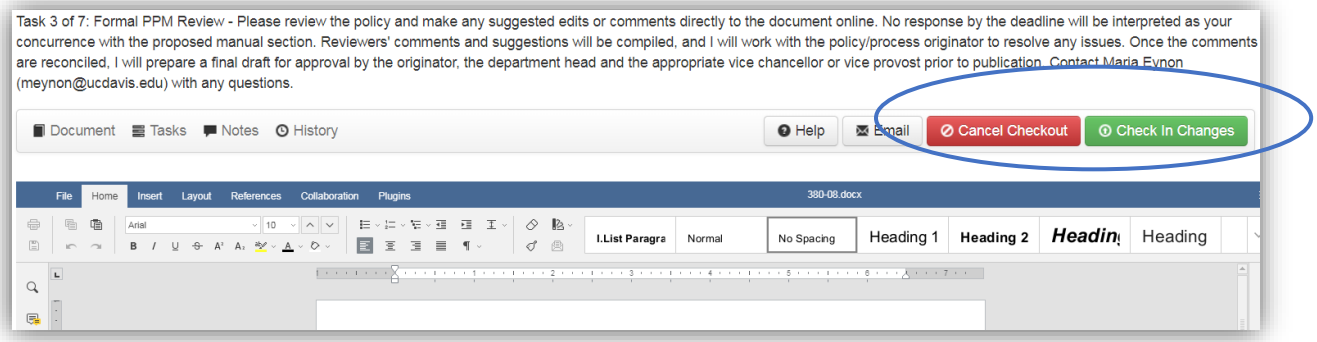


    b. Updates to numbering and formatting in the document are made through the **Home** tab.
    c. To view the document without the tracked changes showing, select the **Collaboration** tab, **Display Mode, Final All changes accepted (Preview)**.

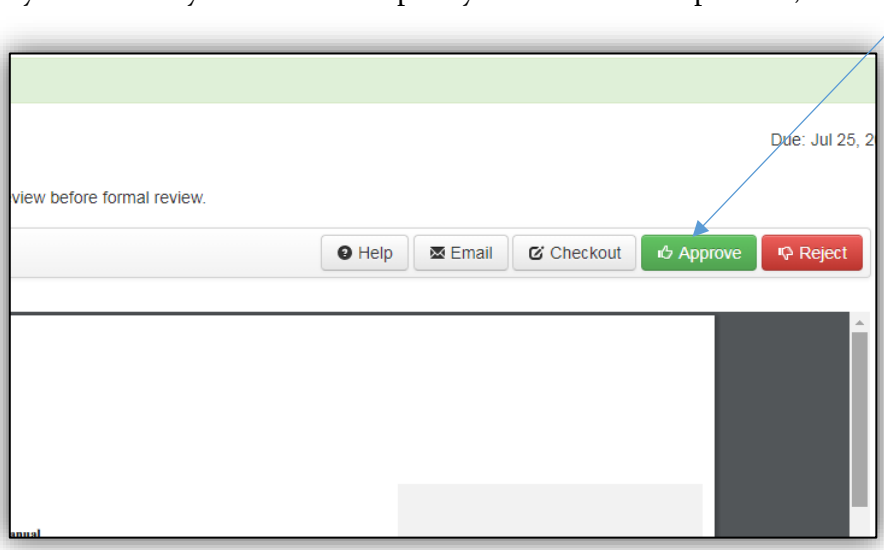


Note: Additional changes cannot be made in this view.

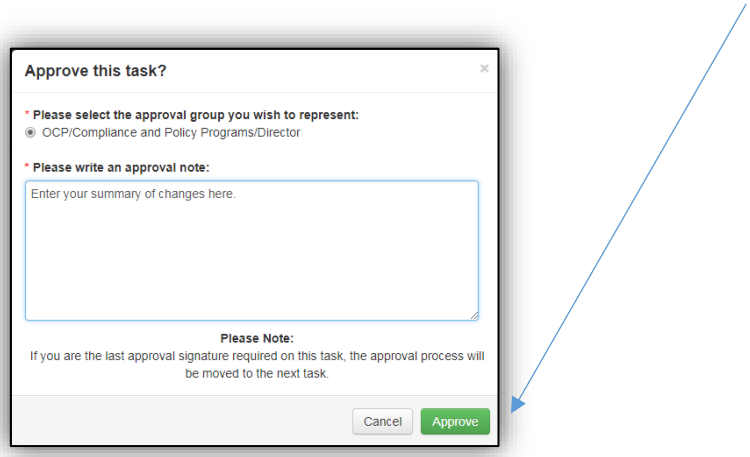
10. When you have completed your edits, select **Check in Changes** to save them and allow other users in the approval flow to access the draft and make changes.



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**.

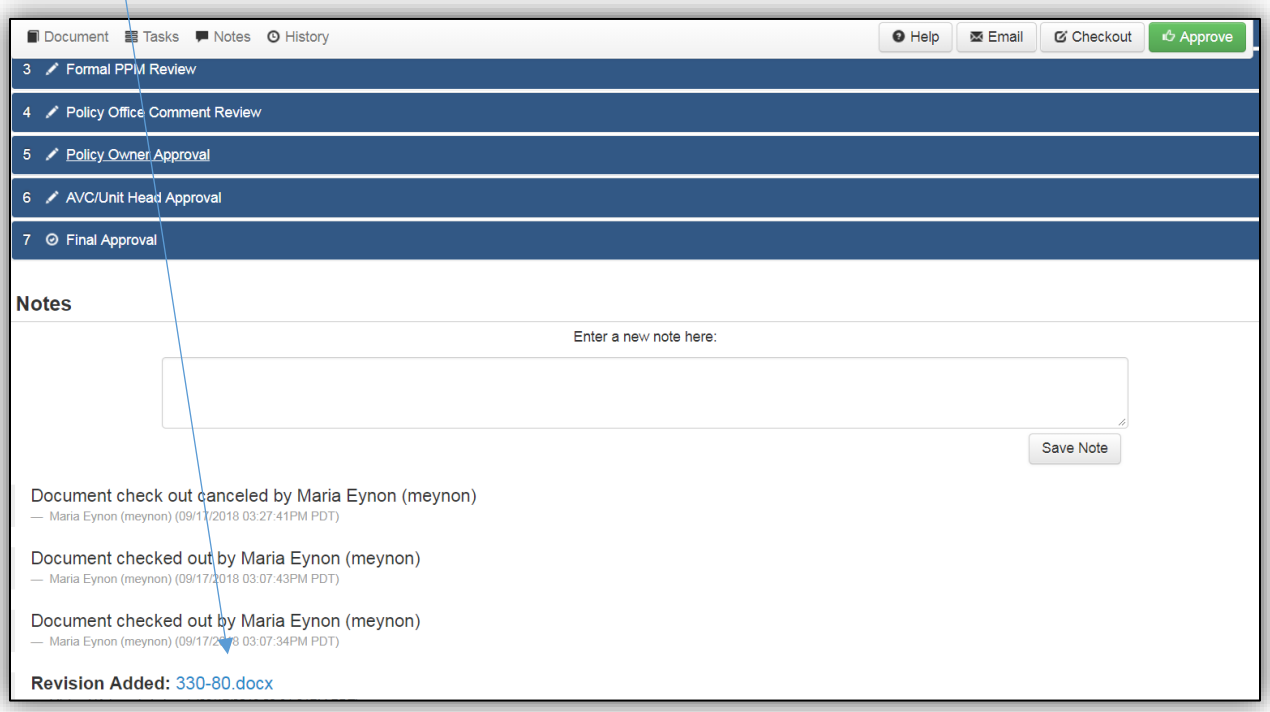


13. Enter a summary of your changes in the text box and select **Approve**.



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.



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.