

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 from the homepage.

=			Q Help O → Guest User →
CINVERSITY OF CALIFORNIA CINVERSITY OF CALIFORNIA CINVERSITY OF CALIFORNIA CONTRACTOR CALIFICA CONTRACTOR CALIFICA CONTRACTOR CALIFICA CONTRACTOR CALIFICA CONTRACTOR CALIFICA	Dashboard This site contains the Policy and Procedure Manual (PPM) Personnel Policies for Staff Members (PPSM) Interim Policies Delegations of Authority (DA)	Welcome to the UC Davis Administrative Policy Manuals Website	

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 O		
Filter Results: development Showing 1 to 1 of 1 en	tries (filtered from 6 total entries)	Show 25 v entrie First Prev 1 Next Last
Document Name Development and Management of Campus Administrative Policie	Your Task Current Task Task Sta S - Formal PPM Review 3 of 7 05/18/20	Irt Task Due Status Checked Out
Copy CSV PDF Print Export all		First Prev 1 Next Last

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

_				٩	Help 🤋 🗸	Maria Eynon 👻
Development and Manage Path: / Manuals / Policy and Procedure Manual (Pf Task 3 of 7: Formal PPM Review - Please m concurrence with the proposed manual sect reconciled, I will prepare a final draft for app (meynon@ucdavis.edu) with any questions	ment of Campus Administrative Policie M) / Introduction aview the policy and make any suggested edits or comments direct ion. Reviewers' comments and suggestions will be compiled, and I roval by the originator, the department head and the appropriate vi	5 Will work with the policy/p ce chancellor or vice prov	No response rocess origina ost prior to pu	by the deadline ator to resolve an ublication. Contac	will be interpret y issues. Once t Maria Eynon	Due: Jun 1, 2018 ed as your the comments are
🗐 Document 📰 Tasks 🗭 Notes 🧿	History 🚺 New Note	Help	Email	Checkout	ර Approve	Reject
	UC Davis Policy and Procedure Manual Introduction Development and Management of Campus Administrative Policies Date: <u>Dreft (11/184-0017</u> Supersedies: <u>13/01/71/21/31/0</u> Responsible Department: Colles 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.

🛢 Tasks 🔎 Notes 🧿 History		Help	Email	O Cancel
You are editing this do	cument. While you are editing this document, no ot	her users ca	an make c	hanges.
	Checkout Options			
	Upload a New Revision File			
	Check In New File			
	- or -			
	Edit Document in Browser			
	✓ Edit with the Policy Manager Editor	>		

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

6. Select the Collaboration tab.



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

Treck Changes Depley Mode - Previous Next Accept - Reject -
· 2 · 1 · 1 · 1 · 1 · · · · · · · · · ·
UC Davis Policy and Procedure Manual
Introduction
Development and Management of Campus Administrative Policies
Date: Draft 4/1/18/1/30/17
Supersedes: <u>1/30/17</u> /42/13/10
Responsible Department: Offices of the Chancellor and Provost
Source Document: IVA
Exhibit A. Structure for Policy and Procedure Manual Sections
Exhibit B, Policy Development Best Practices
Exhibit C. New Policy Development Plan
Exhibit D. Policy Update Submission Checklist
Exhance, Journal and Flory Exhanging in Flores Flow Grant
I. Purpose
This section provides the policy, procedures, and responsibility for development, review, and approval of all campus administrative policies.
II. Policy
A. The Policy and Procedure Manual (PPM) issued by the Offices of the Chancellor and Provost is the official source for campus administrative policies and implementing procedures.
1. The PPM supplements but does not replace Universitywide policies.
2. Campus administrative policies may be more restrictive than Universitywide policies, but can never be more permissive. The more restrictive policy always applies.¶
 Campus administrative policies may cross-reference, but generally should not repeat Universitywide policies to ensure alignment and continued compliance with Universitywide policies change.
B. The PPM is a public document and must be made available to employees.
C. Policy sections in the PPM apply to all units under the jurisdiction of <u>UC</u> Davis, including the <u>UC</u> Davis Health System-and all off-site locations.
D. The PPM contains policies and procedures that are, in general, useful to the entire UC Davis community. It does not include procedures that relate only to the internal operation of a particular department or activity.
🔚 English (United States) ^ 📑 📝 🗟

8. If it is not enabled, click 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. Note that updates to numbering in the document will not appear while you are editing the document.
- c. To view the document without the tracked changes showing, select the Collaboration tab, Display Mode, Final All changes accepted (Preview).



Note: Additional changes can't be made in this view.

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

Task conc are n (mey	3 of 7: Formal PPM Review - Please rev urrence with the proposed manual sectio econciled, I will prepare a final draft for a non@ucdavis.edu) with any questions.	view the policy and make any suggested edits or comments dire n. Reviewers' comments and suggestions will be compiled, and pproval by the originator, the department head and the appropri	ly to the document online. No response by the deadline will be interpreted as your will work with the policy/process originator to resolve any issues. Once the comments the vice chancellor or vice provost prior to publication. Contact Maria Evnon
	Document 🖀 Tasks 🗭 Notes 🗿 H	listory	Help Email Cancel Checkout O Check In Changes
	File Home Insert Layout References	Collaboration Plugins	390-08.docx
# 6	Image:	 ▲ ▲ ⇒ ⇒ ⇒ ⇒ ⇒ ≡ ≡<th>al No Spacing Heading 1 Heading 2 Heading Heading</th>	al No Spacing Heading 1 Heading 2 Heading Heading
Q,	L	[]	<u>A</u>
-			

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.

		Due: Jul 25, 21
view before formal review.		
	😫 Help 🛛 🖉 Email 🖉 Checkout	Approve Reject
		A

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

Approve this task?		×	
* Please select the approval group you wish to re	present:		
 OCP/Compliance and Policy Programs/Director 			
* Please write an approval note:			
Enter your summary of changes here.			/
Please Note:			
If you are the last approval signature required on the be moved to the next ta	is task, the approval process v ask	vill	
be moved to the next to	aun.		/

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 🛛 📰 Ta	asks 🗭 Notes 🗿 History	Help	🖾 Email 🛛 🖉 Checkout	C Approve
8 💉 Formal PPIM F	Review			
🖌 🖍 Policy Office (Comment Review			
5 💉 <u>Policy Owner</u>	Approval			
5 💉 AVC/Unit Hea	d Approval			
′)			
otos				
otes	Enter a nev	/ note here:		
			Save Note	
Document chec — Maria Eynon (meyn	k out canceled by Maria Eynon (meynon) on) (09/1 (2018 03:27:41PM PDT)			
Document chec	ked out by Maria Eynon (meynon)			
— Maria Eynon (meyn	on) (09/17/2018 03:07:43PM PDT)			
Document chec — Maria Eynon (meyn	ked out by Maria Eynon (meynon) on) (09/17/2078 03:07:34PM PDT)			

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.