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.

   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.

4. Select **Checkout** to make changes.
5. Select *Edit With the Policy Manager 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. Select the **Collaboration** tab.

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

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**.

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**.
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.