Providing Policy Input

1. The policy management system will send a weekly email with your assigned tasks; however, the Policy Office will send you an email request to notify you when your input is requested.

2. Click on the link in the email to navigate to your Tasks in the system.

   - If you are not already logged in, select Login with SSO from the homepage.

   Use your UC Davis credentials to login.

   - 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.

![Image of the Policy Manager Editor interface]

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

6. Select the **Collaboration** tab.

![Image of the Collaboration tab interface]
7. Ensure **Track Changes** are turned on so 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 draft 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.

   ![Commenting in a document](image1)

   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)**.

   ![Display Mode](image2)

   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.