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:

   - Number of OverDue Tasks: 4
   - Total Number of Actionable Tasks: 6
   - Please go to the following Policy Manager website to view your Tasks: https://ucdavispolicy.ellucid.com/users/tasks?product=policy

   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 Manger Editor* to open the document in the inline editor.

![Screenshot of the Policy Manager Editor](image1.png)

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

6. Select the **Collaboration** tab.

![Screenshot of the Collaboration tab](image2.png)
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 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.