

Guest Users

1. Access the UC Davis policy manuals at [policy management system](#) (no login required).

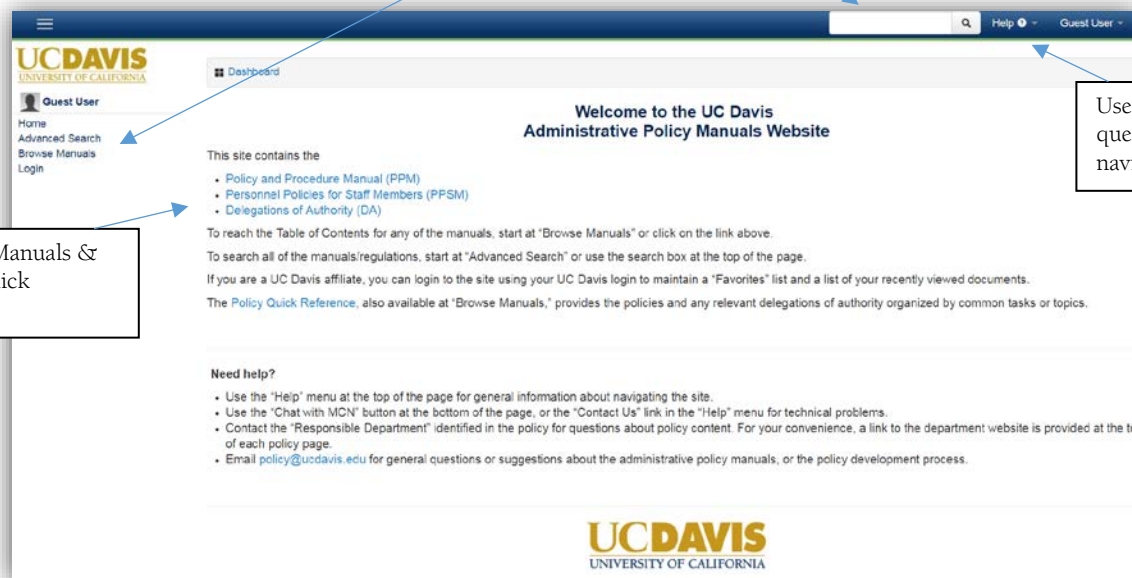
The homepage includes the following (also available to UC Davis affiliates):

- Policy and Procedure Manual (PPM)
- Personnel Policies for Staff Members (PPSM)
- Delegations of Authority (DA)
- Search & Advanced Search
- Browse Manuals
- Policy Quick Reference
- Help

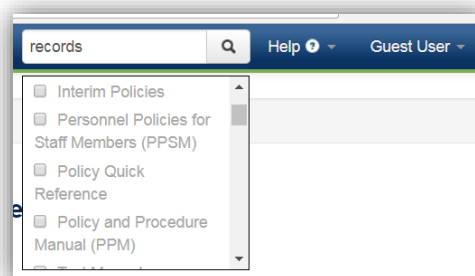
Use Search, Advanced Search or Browse Manuals to find policies

Use Help for general questions or site navigation assistance.

Links to Manuals & Policy Quick Reference



2. Use **Search** or **Advanced Search** to search within specific manual(s).



- Select **Advanced Search** in the navigation menu to refine your search.

- Use drop down menus to limit search results.

Advanced Search

Search: records

Advanced Search

Limit results by Fields

Document title

Limit results by Manual

Policy and Procedure Manual (PPM)

Limit results by Document Classification

Policy

Please enter a search term

3. Manuals contain a **Folder Structure** by policy chapter. Each folder contains a list of documents in that chapter.
 - Select a folder to access the list of documents available.

Policy and Procedure Manual (PPM)

Manuals / Policy and Procedure Manual (PPM)

- Introduction
- 100, UC Organization
- 200, Campus Organization and Management
- 210, Instruction
- 220, Research--General
- 230, Sponsored Programs
- 240, Research Involving Human Subjects
- 250, Intellectual Property
- 260, Gifts and Endowments
- 270, Properties Use and Extracurricular Activities
- 280, Student Affairs
- 290, Health and Safety Services
- 300, Travel and Transportation
- 310, Communications and Technology
- 320, Records and Archives
- 330, Financial Management and Services
- 340, Rates, Recharges, and Sales Activittes
- 350, Supplies and Equipment
- 360, Physical Facilities

4. Select a **Document** link from the list to view the policy.



5. The Policy Document Page will open and includes the following information:

A screenshot of the '280-20, Voluntary Campus-Based Student Fees (280-20)' policy document page. The page includes a breadcrumb trail, a search bar, and a user profile for 'Guest User'. The main content area displays the following information:

- Reference Code:** 280-20
- Related Documents:** +
 - 270-05, Campus Organizations
 - 270-05, Exhibit A, Constituent Organizations and Student Government
 - 270-05, Exhibit B, Registered Student Organizations
 - 280-15, Compulsory Campus-Based Student Fees and Referendum Elections
 - 320-21, Privacy and Disclosure of Information from Student Records
- External links:**
 - UC Davis Student Accounting
 - UC Davis Student Affairs
 - UC Policies Applying to Campus Activities, Organizations, and Students, Section 70, Policy on Registered Campus Organizations
 - UC Policies Applying to Campus Activities, Organizations, and Students, Section 80.00, Policy on Compulsory Campus-Based Student Fees
 - UC Policies Applying to Campus Activities, Organizations, and Students, Section 90, Policy on the Campus Assessment of Voluntary Student Contributions To Student Governments and Registered Campus Organizations

Callouts provide additional instructions:

- Breadcrumbs allow you to navigate back to the chapter listing, the policy listing, or the list of manuals.** (Points to the breadcrumb trail)
- Select Approval Details to view date approved and approved by.** (Points to the 'Approval Details' button)
- Links to external documents referenced in the policy.** (Points to the 'External links' section)
- Print the document.** (Points to the 'Print' button)
- Links to related UC Davis policies referenced in the policy and Revision history. Select the + to expand the list of related documents.** (Points to the 'Related Documents' section)
- Use the scroll bar to view the rest of the policy.** (Points to the scroll bar on the right)

The main content area shows the following text:

UC Davis Policy and Procedure Manual
Chapter 280, Student Affairs
Section 20, Voluntary Campus-Based Student Fees
Date: 8/15/16
Supersedes: 5/21/08
Responsible Department: Student Affairs
Source Document: UC Policies Applying to Campus Activities, Organizations, and Students (Section 90.00, Policy on the Campus Assessment of Voluntary Student Contributions to Student Governments and Registered Campus Organizations)

I. Purpose

6. To access policies and any relevant delegations of authority organized by common tasks or topics, select **Policy Quick Reference** link on the homepage.

This site contains the

- [Policy and Procedure Manual \(PPM\)](#)
- [Personnel Policies for Staff Members \(PPSM\)](#)
- [Delegations of Authority \(DA\)](#)

To reach the Table of Contents for any of the manuals, start at "Browse Manuals" or click on the link above.

To search all of the manuals/regulations, start at "Advanced Search" or use the search box at the top of the page.

If you are a UC Davis affiliate, you can login to the site using your UC Davis login to maintain a "Favorites" list and a list of your recently viewed documents.

The [Policy Quick Reference](#), also available at "Browse Manuals," provides the policies and any relevant delegations of authority organized by common tasks or topics.

- Select a **Folder** with the topic of interest to view the policies and/or delegations that are related.



The screenshot shows the "Policy Quick Reference" page. At the top, there is a blue header with the text "Policy Quick Reference" and a share icon. Below the header, the breadcrumb "Manuals / Policy Quick Reference" is visible. A list of folders is displayed, each with a folder icon and a blue text label: "Complaints/Grievances", "Conflict of Interest", "Event Planning/Entertainment/Hospitality", "Payroll", "Purchasing", "Recruitment/Hiring", and "Trips/Travel". A blue arrow points from the text "Select a Folder" in the previous block to the "Complaints/Grievances" folder.

- Select the **Document** to view the policy or delegation for a topic.

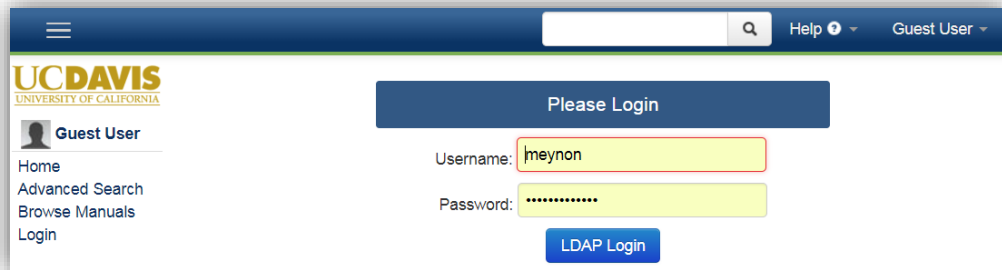


The screenshot shows the "Complaints/Grievances" page. At the top, there is a blue header with the text "Complaints/Grievances" and a share icon. Below the header, the breadcrumb "Manuals / Policy Quick Reference / Complaints/Grievances" is visible. A list of documents is displayed, each with a document icon, a checkbox, and a blue text label: "220-05, Integrity in Research", "380-17, Improper Governmental Activities/Whistleblower Protection", "400-15, Complaints of Discrimination or Harassment", "400-20, Sexual Violence and Sexual Harassment", and "UCD70, Complaint Resolution". At the bottom of the page, there are two buttons: "← Back" and "Save Document(s) To Favorites".

UC Davis Affiliates

Individuals affiliated with UC Davis (e.g., faculty, staff) have access to the tools described in **Guest Users** above, as well as additional tools as follows.

1. Login to the system with your UC Davis credentials. (Suggested internet Browsers: Chrome or Firefox preferred).



2. The additional tools below are available:

- Favorites
- Recent Documents
- Tasks, including a notification badge
- Dashboard
- My Preferences

Favorites allows you to navigate to the list of documents bookmarked

Recent Documents allows you to navigate to the list the last 50 documents viewed

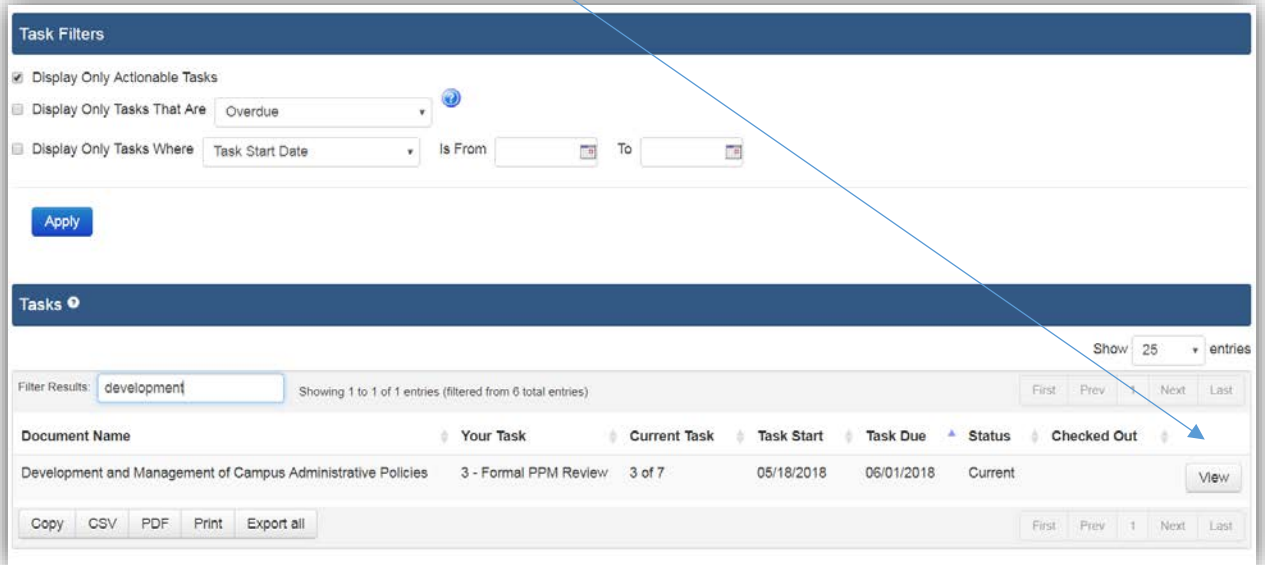
Use the Dashboard to view User specific Calendar

Use My Preferences to edit the frequency of notifications or sign up for policy updates

Select Tasks to view the list of tasks assigned to you



3. From **Tasks**, select **View** next to a task to access the **Document Section** and complete your task (review/approve).
 - **Task Filters** allow Users to search for tasks based on task status, or a date range.



- **Tasks** appear in three colors:
 - Black font – current.
 - Gray font – unavailable (in another step of the process or a future task).
 - Red font – overdue.

4. The Policy Section will open and includes:

- File path location within the system.
- Due date of the step in process.
- The name of the step the process is currently on, including a description.
- View of the document.
- Buttons to Email, Download, Checkout, and Approve.

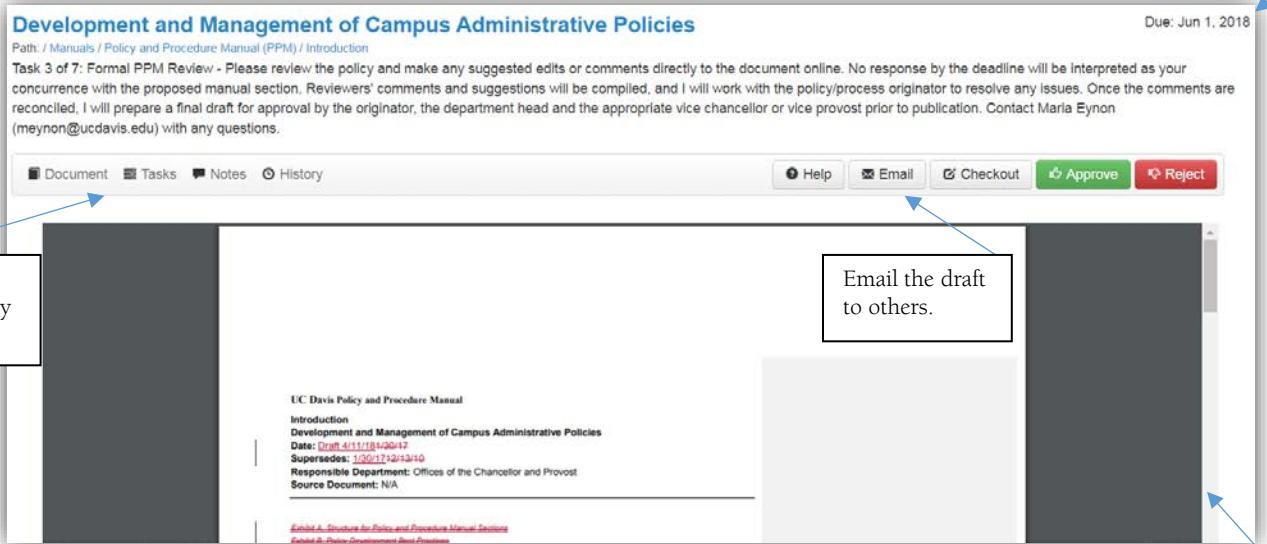
Approval Process step and Task description

Task Due Date

Select navigation buttons to quickly access functions

Email the draft to others.

Use the scroll bar to view the rest of the policy



5. The **Tasks** below the draft Document Page includes:

- All steps in the process, select the name of the step to view the approval groups and its members.
- Type of signature required (All signatures required or any signature required).
- Members of the process (Approval Groups in red have not completed their task. Approval Groups in green have completed their task.)

Document Tasks Notes History Help Email Checkout Approve Reject

4. Ensures access to current policies for employees without internet access, and for emergency purposes (e.g., network outages).

E. Administrative Policy Office

1. Establishes and enforces standards for structure and style of policy sections.
2. Establishes standards for policy reviews and updates.
3. Leads policy development in areas identified as high risk or compliance issues for the campus.
4. Manages the official review of draft policies among appropriate units and resolution of issues raised during policy review.
5. Manages publication and campus communication of approved policy sections.

Tasks

1 Initial Draft Creation/Review ✓

Requires approval from any approval group Editing Task Due On: 05/11/2018

Your policy is due for review. Please make any updates to the draft online, using track changes. When you have completed all of the edits needed and are ready for the policy to be reviewed, click on the Approve button. Enter a summary of your changes and the individuals consulted in the comments field for submission. Contact Maria Eynon (meynon@ucdavis.edu) with questions.

(Approved By: Molly Theodosy)
Compliance and Policy/Policy Analyst
Maria Eynon

OCP/Compliance and Policy Programs/Director
Molly Theodosy

2 Policy Office Review Prior to Formal Review ✓

3 Formal PPM Review

4 Policy Office Comment Review

5 Policy Owner Approval

6 AVC/Unit Head Approval

View the Approval Process steps, due date, status, and members of each task step.

- Policy Developers, Reviewers, Approvers receive an email (default weekly) with a link to pending **Tasks**. To change the frequency of notifications or to sign up for policy updates, see the process for updating **My Preferences** below.
- To take action on a task see [Policy Reviewers: Providing Policy Input](#), [Policy Approvers: Providing Final Policy Approval](#). Additional guidance, instructions and a video is available at [Help Completing a Task](#).

6. The **Notes** section below the draft document includes:

- A free-form text field to enter in messages that might be pertinent to the approval process.
- Links to document files that have been added as part of the approval process.
- Annotations about the approval process, including who checked out the document and when, and approval/rejection notes.

Add your input or comments in Notes

Notes

Enter a new note here:

Save Note

Document check out canceled by Maria Eynon (meynon)

— Maria Eynon (meynon) (05/01/2018 09:33:19AM PDT)

Document checked out by Maria Eynon (meynon)

— Maria Eynon (meynon) (04/19/2018 11:01:42AM PDT)

Document check out canceled by Maria Eynon (meynon)

— Maria Eynon (meynon) (04/12/2018 01:42:10PM PDT)

Document checked out by Maria Eynon (meynon)

— Maria Eynon (meynon) (04/12/2018 10:39:21AM PDT)

Revision Added: [280-10.docx](#)

— Maria Eynon (meynon) (04/04/2018 11:03:32AM PDT)

Document checked in by Maria Eynon (meynon) using Inline Editing

— Maria Eynon (meynon) (04/04/2018 11:03:32AM PDT)

Document checked out by Maria Eynon (meynon)

— Maria Eynon (meynon) (04/04/2018 11:01:37AM PDT)

Document check out canceled by Duane Lindsay (dlind)

— Duane Lindsay (dlind) (03/08/2018 03:28:17PM PST)

Document checked out by Duane Lindsay (dlind)

Download draft versions added

View approval process activity

7. The **History** section below the draft document includes:

- An audit history of the process.
- An option to print the history of the approval process or view drafts added.

View note and revision activity by member and date

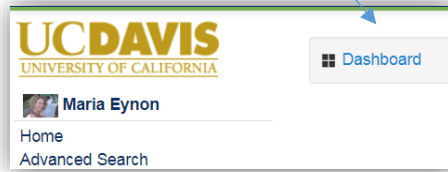
Print the audit history

History				
<input checked="" type="checkbox"/> Display Notes <input checked="" type="checkbox"/> Display Revisions <input type="checkbox"/> Display Logs				
Type	Task	Created By	Note	Created On
Note	1	Maria Eynon (meynon)	Document check out canceled by Maria Eynon (meynon)	05/01/2018 09:33:19AM PDT
Note	1	Maria Eynon (meynon)	Document checked out by Maria Eynon (meynon)	04/19/2018 11:01:42AM PDT
Note	1	Maria Eynon (meynon)	Document check out canceled by Maria Eynon (meynon)	04/12/2018 01:42:10PM PDT
Note	1	Maria Eynon (meynon)	Document checked out by Maria Eynon (meynon)	04/12/2018 10:39:21AM PDT
Revision	1	Maria Eynon (meynon)	Revision Added: 280-10.docx	04/04/2018 11:03:32AM PDT
Note	1	Maria Eynon (meynon)	Document checked in by Maria Eynon (meynon) using Inline Editing	04/04/2018 11:03:32AM PDT
Note	1	Maria Eynon (meynon)	Document checked out by Maria Eynon (meynon)	04/04/2018 11:01:37AM PDT
Note	1	Duane Lindsay (dlind)	Document check out canceled by Duane Lindsay (dlind)	03/08/2018 03:28:17PM PST
Note	1	Duane Lindsay (dlind)	Document checked out by Duane Lindsay (dlind)	03/08/2018 03:18:43PM PST
Note	1	Duane Lindsay (dlind)	Document checked in by Duane Lindsay (dlind) using Inline Editing	03/08/2018 03:18:16PM PST
Revision	1	Duane Lindsay (dlind)	Revision Added: 280-10.docx	03/08/2018 03:18:16PM PST
Note	1	Duane Lindsay (dlind)	Hello	03/08/2018 03:15:17PM PST
Note	1	Duane Lindsay (dlind)	Document checked out by Duane Lindsay (dlind)	03/08/2018 03:08:22PM PST
Note	1	Maria Eynon (meynon)	Made edits and comments for testing purposes.	03/08/2018 02:38:06PM PST

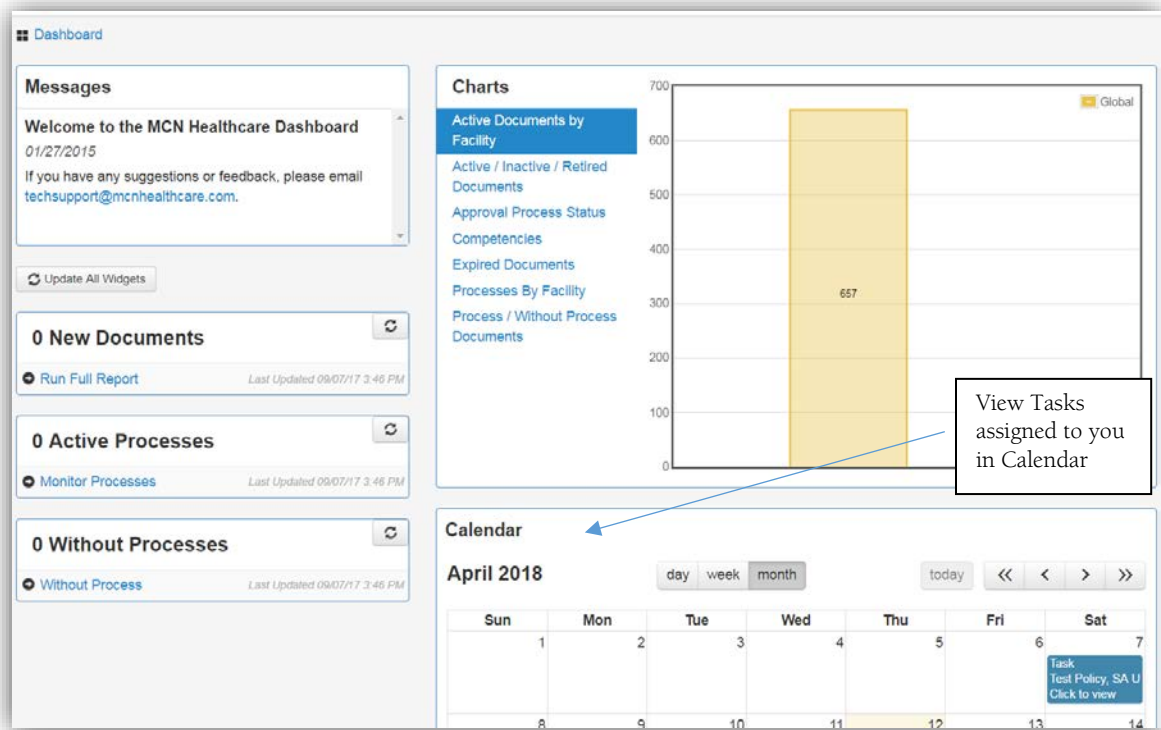
Download draft versions added

- The Policy Office is the last approver in the workflow and conducts a quality check, or makes any necessary edits based on Approver input prior policy publication.
- Upon publication of the approved policy, the old revision of the policy and full review/approval history is archived automatically.
- The full audit history is accessible by the Policy Office for future reference.

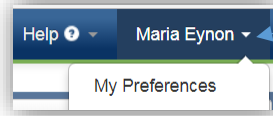
8. Access the User specific **Dashboard** from the homepage and includes a calendar that includes assigned **Tasks** by date.



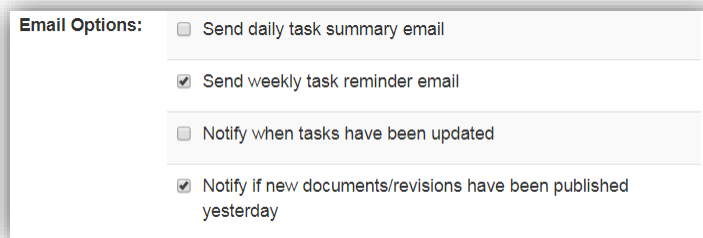
- The following information is included:
 - Messages from the vendor.
 - Number of New, Active or Documents Without Processes.
 - Charts.
 - User specific calendar with tasks.



9. Go to **My Preferences** from the homepage to edit preferences, frequency of task notifications, and sign up for policy updates.
 - Edit Email Options, select the drop down menu or arrow next to your name on the upper right corner of the screen, select **My Preferences**.

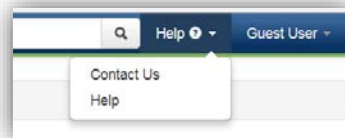


- Edit **Email Options**, as necessary, select save.



Need Additional Assistance?

1. Use the **Help** menu at the top of the homepage to contact the vendor MCN Healthcare to access general information about navigating the site, provide feedback or for technical support. These tools are not used for general support or to provide policy related feedback.



- Select **Contact Us** for technical support and feedback to the vendor.

This is the best way to contact the MCN Healthcare staff directly.
Logging problems through this form allows us to work quickly and efficiently to answer questions or resolve issues.

[Click here](#) to visit the MCN Community

To request membership in the MCN Community, please send an email to techsupport@mcnhealthcare.com, and indicate your interest in joining the community.

You can also contact us by phone or fax:
Toll free: 800-538-6264
International: +1-303-762-0778
Fax: 303-762-0774

Feedback Type: *

Your Name: *

Subject: *

Your Email Address: *

Phone Number:

Preferred Method of Contact: By Email
 By Phone
 I do not want to receive a reply to my feedback.

Reply:
Comments: *

- Select **Help** to access general information about navigating the site.

MCN Healthcare Help Section

Popular Help Topics

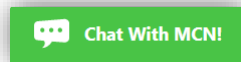
Basic Functions <ul style="list-style-type: none">• Browsing Manuals• Completing Competencies• Logging In• Searching for Documents	Document Management <ul style="list-style-type: none">• Creating and Uploading Documents• Managing Manuals and Folders• Quick Approve
Site Administration <ul style="list-style-type: none">• Assign Competencies• Backups• Departments• Email Preferences• Guest Settings• Users• User Import	Approval Process <ul style="list-style-type: none">• Approval Groups• Approval Templates• Completing A Task- NEW Editor!
	Open Training Sessions <ul style="list-style-type: none">• Open Training Sessions Descriptions• Calendar

Can't find an answer?
Email Us
techsupport@mcnhealthcare.com

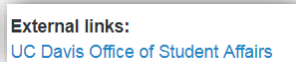
By Phone
Product and Technical Support:
Toll free: 800-538-6264
International:
+1-303-762-0778
Fax: 303-762-0774

Was this information helpful?
 Yes No

- Use the **Chat with MCN** button at the bottom of the homepage, for technical problems/support from the vendor.

A white chat form with a green header bar that says "Now Chatting" and a dropdown arrow. Below the header, it says "Please let us know who you are!". There are three input fields: "Enter Your Name", "Enter Your Email", and "Enter Your Phone". At the bottom is a green button with the text "Click here to start chatting".

2. Contact the **Responsible Department** identified in the policy for questions about policy content. A link to the department website is provided at the top of each **Policy Document Page** under **External Links**.



3. Email policy@ucdavis.edu for general questions or suggestions about the administrative policy manuals, or the policy development process.