UC **DAVIS**
UNIVERSITY OF CALIFORNIA

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)
   - Interim Policies
   - Delegations of Authority (DA)
   - Search & Advanced Search
   - Browse Manuals
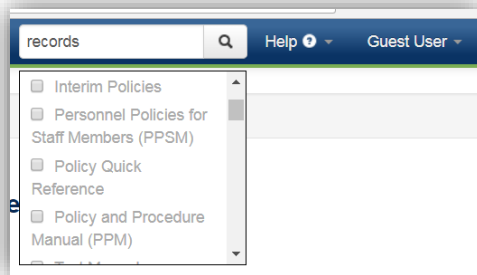   - Policy Quick Reference
   - Help

> 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.

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.

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

280, Student Affairs

Manuals / Policy and Procedure Manual (PPM) / 280, Student Affairs

☐ 📄 280-01, Student Rights and Responsibilities

☐ 📄 280-10, Death of a Student, Former Student, or Applicant

☐ 📄 280-15, Compulsory Campus-Based Student Fees and Referendum Elections

☐ 📄 280-20, Voluntary Campus-Based Student Fees

← Back   Save Document(s) To Favorites

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

Breadcrumbs allow you to navigate back to the chapter listing, the policy listing, or the list of manuals.

Links to external documents referenced in the policy.

Print the document.

Links to related UC Davis policies referenced in the policy and Revision history. Select the **+** to expand the list of related documents.

Use the scroll bar to view the rest of the policy.

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.

Policy Quick Reference ☑

Manuals / Policy Quick Reference

📁 **Complaints/Grievances**

📁 **Conflict of Interest**

📁 **Event Planning/Entertainment/Hospitality**

📁 **Payroll**

📁 **Purchasing**

📁 **Recruitment/Hiring**

📁 **Trips/Travel**

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

Complaints/Grievances ☑

Manuals / Policy Quick Reference / Complaints/Grievances

☐ 📄 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

☐ 📄 UCD70, Complaint Resolution

← Back   Save Document(s) To Favorites

UC Davis Affiliates

Individuals affiliated with UC Davis (e.g., faculty/academics, 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 via Single Sign On /SSO through the Central Authentication Service CAS (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 o edit the frequency of notifications or sign up for policy updates

Select Tasks to view the list of tasks assigned to you
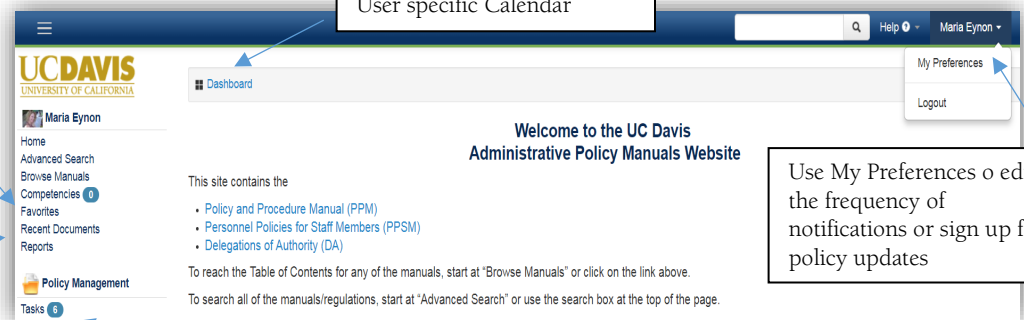
3. From **Tasks**, select **View** next to a task to access the **Document Section** (document draft) and complete your task (review/approve).

  ▪ **Task Filters** allow Users to search for tasks based on task status, or a date range.

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

Development and Management of Campus Administrative Policies

Due: Jun 1, 2018

Path: / Manuals / Policy and Procedure Manual (PPM) / Introduction

Task 3 of 7: Formal PPM Review - Please review the policy and make any suggested edits or comments directly to the document online. No response by the deadline will be interpreted as your concurrence with the proposed manual section. Reviewers' comments and suggestions will be compiled, and I will work with the policy/process originator to resolve any issues. Once the comments are reconciled, I will prepare a final draft for approval by the originator, the department head and the appropriate vice chancellor or vice provost prior to publication. Contact Maria Eynon (meynon@ucdavis.edu) with any questions.

Document | Tasks | Notes | History

Help | Email | Checkout | Approve | Reject

Select navigation buttons to quickly access functions

Email the draft to others.

UC Davis Policy and Procedure Manual

Introduction
Development and Management of Campus Administrative Policies
Date: Draft 4/11/18 1/30/17
Supersedes: 1/30/17 12/13/10
Responsible Department: Offices of the Chancellor and Provost
Source Document: N/A

Exhibit A, Structure for Policy and Procedure Manual Sections
Exhibit B, Policy Development Best Practices

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.)

- 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 (e.g., summary of changes, individuals consulted as part of the update, questions, etc.)
   - 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)

Download draft versions added that include comments and changes tracked

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)

View approval process activity

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)

7. The **History** section below the draft document includes:
   - A full audit history of the process.
   - An option to print the history of the approval process or view drafts (revisions added).

<table>
<tr><td>View note and revision activity by member and date</td></tr>
</table>

History

<table>
<tr><td>☑ Display Notes</td><td>☑ Display Revisions</td><td>☐ Display Logs</td><td colspan="2" align="right">🖶 Print History</td></tr>
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<tr><td>Revision</td><td>1</td><td>Maria Eynon (meynon)</td><td>Revision Added: 280-10.docx</td><td>04/04/2018 11:03:32AM PDT</td></tr>
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<tr><td>Note</td><td>1</td><td>Duane Lindsay (dlind)</td><td>Document check out canceled by Duane Lindsay (dlind)</td><td>03/08/2018 03:28:17PM PST</td></tr>
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<tr><td>Revision</td><td>1</td><td>Duane Lindsay (dlind)</td><td>Revision Added: 280-10.docx</td><td>03/08/2018 03:18:16PM PST</td></tr>
<tr><td>Note</td><td>1</td><td>Duane Lindsay (dlind)</td><td>Hello</td><td>03/08/2018 03:15:17PM PST</td></tr>
<tr><td>Note</td><td>1</td><td>Duane Lindsay (dlind)</td><td>Document checked out by Duane Lindsay (dlind)</td><td>03/08/2018 03:08:22PM PST</td></tr>
<tr><td>Note</td><td>1</td><td>Maria Eynon (meynon)</td><td>Made edits and comments for testing purposes.</td><td>03/08/2018 02:38:06PM PST</td></tr>
</table>

Print the audit history

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.
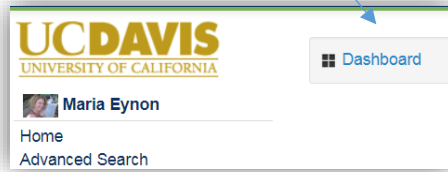

- ▪ The following information is included:
  - o Messages from the vendor.
  - o Number of New, Active or Documents Without Processes.
  - o Charts.
  - o User specific calendar with tasks.
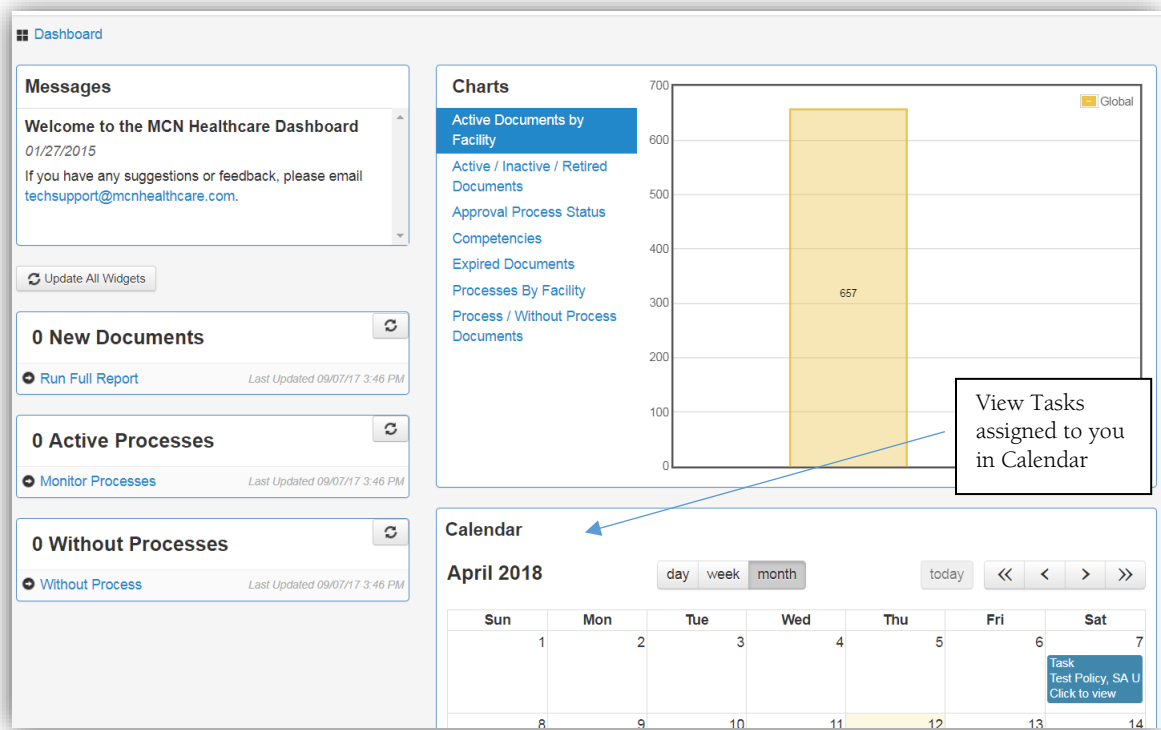
9. Go to **My Preferences** from the homepage to edit preferences, frequency of task notifications, and sign up for policy updates.
   ▪ Edit Email Options, select the drop down menu or arrow next to your name on the upper right corner of the screen, select **My Preferences**.
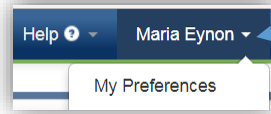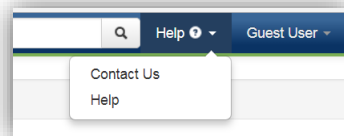
   ▪ Edit **Email Options**, as necessary, select save.
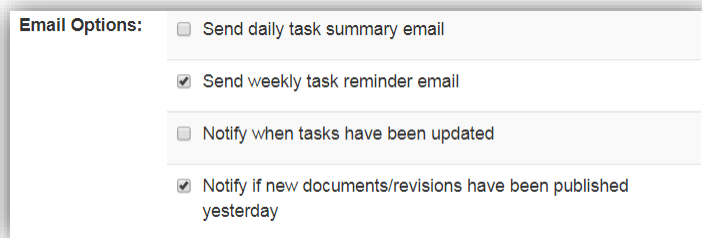
Need Additional Assistance?

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: *	Please select Feedback Type ▼
Your Name: *	Maria Eynon
Subject: *	
Your Email Address: *	meynon@UCDAVIS.EDU
Phone Number:	
Preferred Method of Contact:	● By Email ○ By Phone
Reply:	☐ I do not want to receive a reply to my feedback.
Comments: *	

Send Feedback

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

MCN Healthcare Help Section

[   ] Search

Popular Help Topics

Basic Functions
- Browsing Manuals
- Completing Competencies
- Logging In
- Searching for Documents

Site Administration
- Assign Competencies
- Backups
- Departments
- Email Preferences
- Guest Settings
- Users
- User Import

Document Management
- Creating and Uploading Documents
- Managing Manuals and Folders
- Quick Approve

Approval Process
- Approval Groups
- Approval Templates
- Completing A Task– NEW Editor!

Open Training Sessions
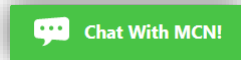- Open Training Sessions Descriptions
- Calendar

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.

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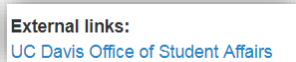
3. Email policy@ucdavis.edu for general questions or suggestions about the administrative policy manuals, or the policy development process.