Policy Writer's Checklist

Updating your policy sections and exhibits:

- ☐ The policy system will send policy owners a weekly email with assigned tasks when your policy is due for update.
- ☐ For updates outside of the four-year cycle, request initiation of the policy update process from your Unit Policy Coordinator (see https://manuals.ucdavis.edu/unit-policy-coordinators). A link to the draft in the system will be provided to key in tracked changes. See Policy Owners: Submitting Policy Updates.
- ☐ Ensure that the "Track Changes" feature is turned on in the draft before keying in changes.
- ☐ Keep in mind the purpose of the policy section. Think specifically about what information campus departments will need in order to use the policy and complete their work accurately. Promotional information and details regarding your internal administrative procedures are not appropriate.
- ☐ When reviewing your procedures, focus on being clear and succinct. Use plain language. Streamline procedures when possible, but provide enough information that policy users can complete their tasks easily.
- ☐ Attempt to limit your policy section to the least number of pages necessary to keep it as user-friendly as possible. Policies that are longer than 6 pages should be closely reviewed to determine if they are addressing too many issues in a single policy, or if they are providing extra information that is not necessary. Policy sections can sometimes be divided into two or more smaller sections to provide clearer direction.
- ☐ Check all related policies and laws to ensure your policy is in compliance and discuss major changes with other stakeholder departments and the Administrative Policy Office so they are alerted to the potential change. Be aware that changes you make to one policy section may affect others.
- ☐ Check all contact information, department names, position titles, phone numbers, email addresses, and referenced sites in your policy to ensure continued accuracy.

Writing new policy sections:

- ☐ Before starting development, consult with your Unit Policy Coordinator, complete the online *New Policy Development Plan Form* and submit to the Administrative Policy Office. If the plan is approved, you will be notified of the assigned policy number and provided with a link to the system to the policy template.
- ☐ Complete the general information at the top of the policy section template, including the department responsible for the policy, and the law or systemwide policy that is the source for the campus policy when applicable.
- ☐ Refer to the *Development and Management of Campus Administrative Policies* and *Guide to Writing Policy* for guidelines regarding the standard structure for policy sections.
- ☐ Consult with the Administrative Policy Office regularly during development and consultation.

Submitting drafts for formal review:

- ☐ When the draft is ready for review, approve the Task in the system and include the following information:
    - A brief summary of the revision.
    - The names and departments of individuals who have been consulted on the update or development of the policy section.
    - The names and departments of individuals who the responsible department determines should be included in the formal review.
- ☐ The Administrative Policy Office will review the policy section, making editorial and structural changes needed for clarity. If necessary, an updated draft or questions will be returned for resolution.

Policy Writer's Checklist

Procedures for Review and Approval:

- ☐ You will receive a formal review request from the Administrative Policy Office with a link to the policy draft in the system. The review request and the workflow in the system will list the names of all individuals who have been asked to review the policy and the deadline to submit changes.
- ☐ Submit any needed revisions or comments in the system by keying in track changes, adding comments or notes by the deadline indicated on the review request.
- ☐ The Administrative Policy Office will review the submitted comments, notes and edits and will return any comments or questions that require resolution.
- ☐ When all comments have been resolved, you will receive a weekly email with your assigned tasks to navigate to the policy. Read the policy section carefully and enter your approval. The policy will advance to next step in the workflow for next individual listed to provide approval.

Update lists:

- ☐ Review the sections listed on the update list for which you are identified as the policy developer.*
- ☐ Indicate a target date for completion of the update.
- ☐ Determine which of the following actions is required for each policy section:
    - *No changes required—all policy statements, procedures, content, contact information, references, links, etc. are accurate and the policy can be reissued as is.*

      You will receive a weekly email with assigned tasks that includes a link to the system to access the final approval request to verify that the policy section remains completely accurate. The policy section will be reissued after it is fully approved.
    - *Minor revisions are required—contact information, department names, referenced policy section names have changed, but the basic content of the policy statements and procedures is still accurate; no substantive changes.*

      Key in your tracked changes to the draft in the system. The Administrative Policy Office will determine if the policy section requires formal review prior to final approval.
    - *Major revisions are required—the policy and/or procedures are outdated or out of compliance.*

      Determine your target date for submission of the update for review and key in tracked changes to the draft in the system. Consult with the Administrative Policy Office as needed to assist with content, structure, and organization.
    - *Delete from manual—this policy section is no longer required.*

      You must provide a statement describing the reason why the section is to be deleted, and where departments can go to get information on the current procedure (if applicable).
- ☐ Indicate the risk level to be associated with the policy (high, medium, low) based on assessment of legal, financial, reputational or health and safety risks of non-compliance.
- ☐ Provide a status update of each policy section to the Administrative Policy Office and your Unit Policy Coordinator.

* If you are no longer the policy developer for a specific policy, or you are misidentified as the policy developer, contact your Unit Policy Coordinator. If known, provide the name of the correct policy developer.

Note: The above information should be added in the Notes field in the system. You will receive a weekly email with assigned tasks when your policy is due for update. See [Policy Management System Training] for additional materials and resources to assist you in using the system.