Policy Action Form – Guide

Field	Input	Guide
Title		Policy Title
Policy Number	Enter the Reference Number (e.g., APMxxx)	
Reason	☐ Best Practice ☐ Federal Law/Regulation ☐ State Law/Regulation ☐ Minor Edits ☐ Regents Policy	Select the option that best describes the reasoning behind the new policy
Search Term(s)		Provide at least 5 common terms that customers will normally use when searching for this policy. These should be unique, to the policy, including technical and non technical jargon.
Description of Reason		Succinctly provide the reason for the create of the new policy
Policy Owner	Person responsible for creating or updating the policy	Select the PO from the address book, or type in the name and verify using the check (√)
Responsible Office		Select from the dropdown menu
Responsible Officer Title	The title of the responsible officer	
Responsible Officer		Select the RO from the address book, or type in the name and verify using the check (√)
Business Unit Coordination	☐ Academic Affairs ☐ Academic Personnel ☐ Academic Planning, Programs & Coordination ☐ Academic Senate ☐ Agriculture & Natural Resources	Select which department(s) will be affected by the policy and will provide input during development of the policy
Affected Policies or Procedures		Describe which policies may be impacted by the new/revised policy.

Implementation Methods	☐ Procedures
	☐ Forms
	☐ Training
	☑ [_____]

| Implementation Details | [_____] |

| Implementation Challenges | [_____] |

| Mechanisms to Ensure Compliance | [_____] |

| Additional Information to Support Proposed Action | [_____] |

| Financial Impact | [_____] |
| | Discuss the financial impact to the University |

| Request Status | 1. Pending |

| Approve/Return Comments | [_____] |

If the policy will require changes in procedures in order to meet the mandated actions, indicate how you plan to meet those changes and whether you anticipate any difficulties (eg. new regulations in accounting for time on projects – do you plan to train staff? Will that be difficult to accomplish Systemwide?)

How will you ensure that the policy is being followed? Track training, reporting, etc..

Please provide any additional information that would assist the review process.

Will there be any financial impact from implementing or complying with this policy? (eg. Training requirements, systems purchases)

Please describe the reason that the policy was approved/returned. What needs to be changed in order for the policy to be approved?

| Cancel | Save | Submit & Close |

New or Interim Policy Action Sample

Title		*

Policy Number	
	Enter the Reference Number (e.g., APMxxx)

Reason	☐ Best Practice *
	☐ Federal Law/Regulation
	☐ State Law/Regulation
	☐ Minor Edits
	☐ Regents Policy

Search Term(s)	*

Description of Reason	*

Policy Owner	*
	Person responsible for creating or updating the policy

Responsible Office	*

Responsible Officer Title	
	The title of the responsible officer

Responsible Officer	*

Business Unit Coordination	☐ Academic Affairs
	☐ Academic Personnel
	☐ Academic Planning, Programs & Coordination
	☐ Academic Senate
	☐ Agriculture & Natural Resources

Affected Policies or Procedures	

Implementation Methods	☐ Procedures
	☐ Forms
	☐ Training
	☑ [ ]

| Implementation Details | |

| Implementation Challenges | |

| Mechanisms to Ensure Compliance | |

| Additional Information to Support Proposed Action | |

| Financial Impact | |

Discuss the financial impact to the University

| Request Status | 1. Pending ▾ |

| Approve/Return Comments | |

| Cancel | Save | Submit & Close |

Rescission or Update Policy Action Sample

Title		
Policy Number		
	Enter the Reference Number (e.g., APMxxx)	

Existing Policy

Reason
- [ ] Best Practice
- [ ] Federal Law/Regulation
- [ ] State Law/Regulation
- [ ] Minor Edits
- [ ] Regents Policy

Search Term(s)

Description of Reason

Policy Owner

Person responsible for creating or updating the policy

Responsible Office

Responsible Officer Title

The title of the responsible officer

Responsible Officer

Business Unit Coordination
- [ ] Academic Affairs
- [ ] Academic Personnel
- [ ] Academic Planning, Programs & Coordination
- [ ] Academic Senate
- [ ] Agriculture & Natural Resources

Affected Policies or Procedures

Additional Information to Support Proposed Action

Request Status

1. Pending

Approve/Return Comments

| Cancel | Save | Submit & Close |

Minor Update Policy Action Sample

Title	
Policy Number	
	Enter the Reference Number (e.g., APMxxx)
Existing Policy	
Reason	☐ Best Practice ☐ Federal Law/Regulation ☐ State Law/Regulation ☐ Minor Edits ☐ Regents Policy
Search Term(s)	
Description of Reason	
Policy Owner	
	Person responsible for creating or updating the policy
Responsible Office	
Responsible Officer Title	
	The title of the responsible officer
Responsible Officer	
Additional Information to Support Proposed Action	
Request Status	1. Pending
Approve/Return Comments	

Cancel	Save	Submit & Close