PolicyStat Navigation Guide

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PLEASE NOTE: Do not click "**Start Approvals**" until instructed to do so by Policy Officer

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Get Started

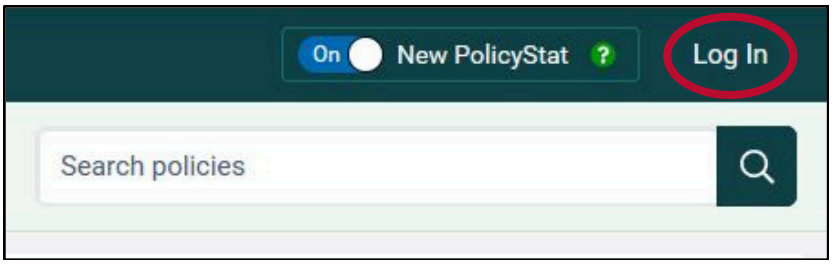
Site Selection

Currently, there are nine (9) UNM sites managed in PolicyStat. For Owners, Editors, Co-Editors, all work is completed in site **3. University Administrative (UAP)**

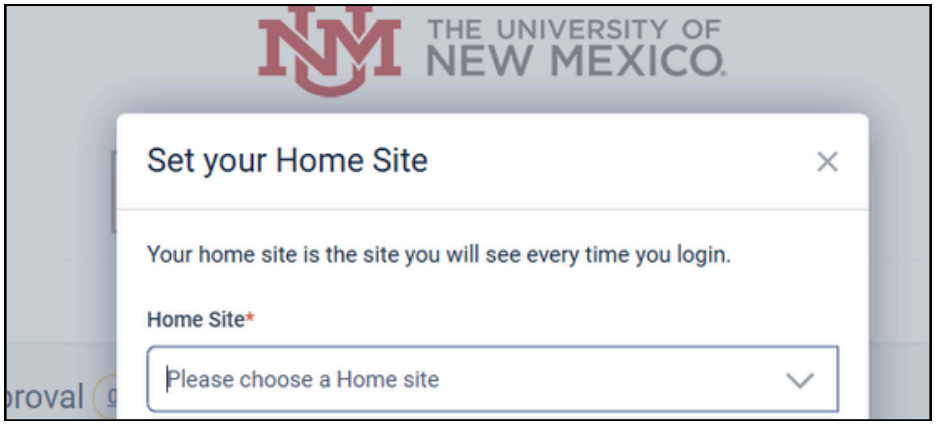


Logging In (Owners, Editors, Co-Editors, etc.)

Log in to PolicyStat online by using your UNM SSO login credentials.



You will be prompted to select a home site. Chose **3. University Administrative (UAP)**. This site is for editing and managing all policies as a Policy Owner or Designated Co-Editor. If you select a different site by mistake, contact the Policy Office to have this fixed.



Please Note: Any UNM community member with an @unm or @salud account will also be able to log in. However, they will only have guest access to policies unless higher permission levels are granted by the Policy Office.

Permission Levels

What are user roles and what permissions do they have in PolicyStat?

UNM Community and Guests (Public Access, Search and Download)

- Ability to search, view, read, print, and share all policies across PolicyStat.

Policy Process Owner (Edit and Manage Policies)

- Responsible for editing and managing the documents for which they are considered designated as Policy Owners.
- Start the review process when policies are due for review (every 3 years).
- Approve if included in the workflow.

Designated Co-Editor (Edit and Manage Policies)

- Create and edit policies within designated section (i.e. Section 2000).

Please Note: Because of the PolicyStat permissions functionality, Designated Co-Editors have access that must be used with restraint. Please see the following page on those details.

Request Co-Editor Access

Use the link here or scan the QR code below for the PolicyStat Co-Editor Request form.

The form is also located in the Policy Toolkit https://policy.unm.edu/policy-resources/policy-toolkit/index.html.

What is "Area Editor" Access and How Does It Relate to Editors and Designated Co-Editors?

In PolicyStat, the system permissions that are granted to a Designated Co-Editor to create and edit policies within a policy section (e.g., the 2000 section) is called "**Area Editor**."

At UNM, we will continue using the term "**Designated Co-Editor**" for clarity, but when using PolicyStat's support resources, please note that the system refers to this role as "**Area Editor**."

Because of PolicyStat's permission structure:

- Designated Co-Editors will have access to all policies within the UAPPM section in which their policy resides, *including policies they do not officially own*.
- Designated co-editors can open and edit any policy in the section they have been granted editing permissions. However, all edits must still go through the Policy Owner, Policy Office and the formal approval workflow process, ensuring changes are reviewed and published appropriately.

We trust all co-editors to edit only the policies their unit is responsible for.

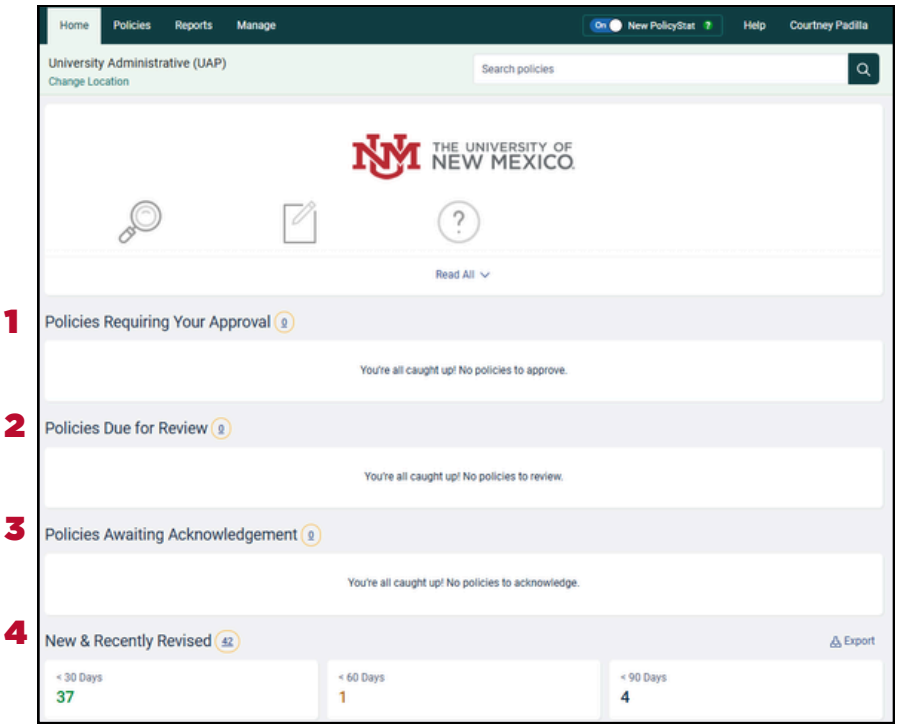
Helpful Related Links

- What are user roles and what permissions do they have in PolicyStat?
- 1.1 Owner Overview: What is an Owner?

Policy Owner/Editor Dashboard

Policy Owner/Editor Dashboard

Log in to PolicyStat online by using your UNM SSO login credentials.



1. **Policies Requiring Your Approval**: List of policies waiting for your review and approval. They appear on your home dashboard if you are a member of an Approval Workflow and the policies are awaiting your review and approval.
   - How do I see the policies requiring my approval?
2. **Policies Due for Review:** List of policies you own (or policies in a section of the UAPPM you have permissions), that are nearing their scheduled review date.
   - The Review Process: Due For Review Report
   - What are user roles and what permissions do they have in PolicyStat?
3. **Polices Awaiting Acknowledgement:** We do not use this feature currently.
4. **New & Recently Revised:** A color-coded breakdown of the number of policies newly created/revised in the last 30, 60, and 90 days.
   - Can I view a list of new and recently revised policies?

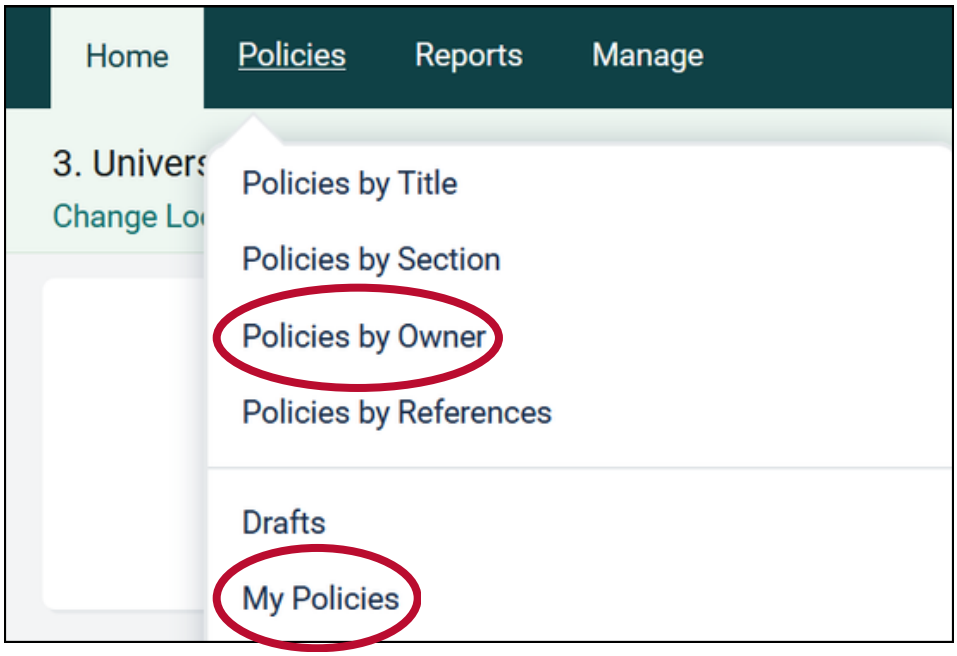
Helpful Related Links

- What displays on the PolicyStat home page?
- How do I narrow the list of pending policies?
- Approval Workflow

Find Your Policies

Log in to PolicyStat online by using your UNM SSO login credentials.

- After you've logged in, select Site **3. University Administrative (UAP).**
- Click Policies in the top left hand menu and select **My Policies.**
- This will display all your policies.
- You can also search by **Policies by Owner.** The end result is the same, but the Policies by Owner approach has two more steps.



Helpful Related Links

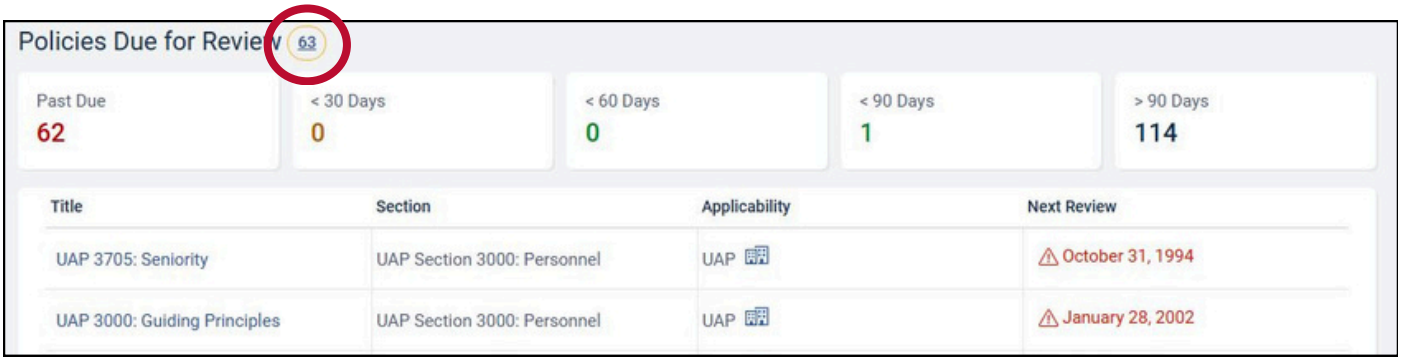
- What displays on the PolicyStat home page?
- How do I narrow the list of pending policies?
- Approval Workflow

Policies Due For Review

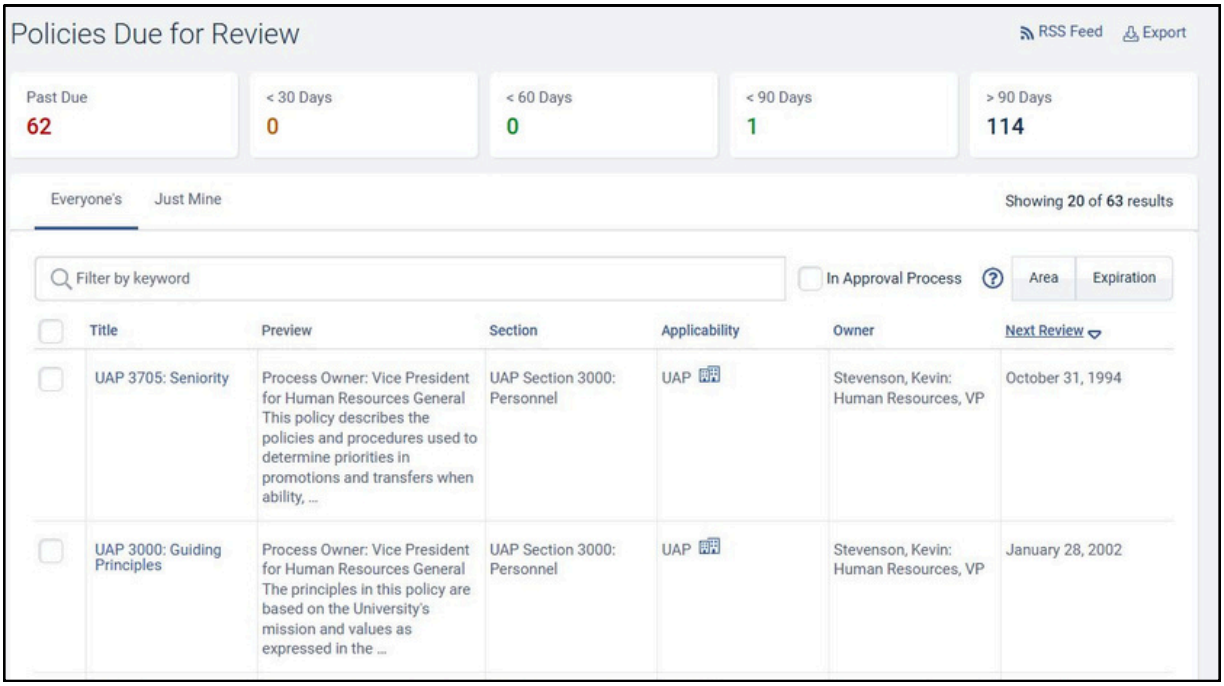
Review dates assigned within the system every three (3) years per UAP 1100.

- **Due for Review Report**

On your home page, you will see a preview of the Policies Due For Review dashboard. Click the circled number next to **Policies Due for Review** to access the full list of policies.



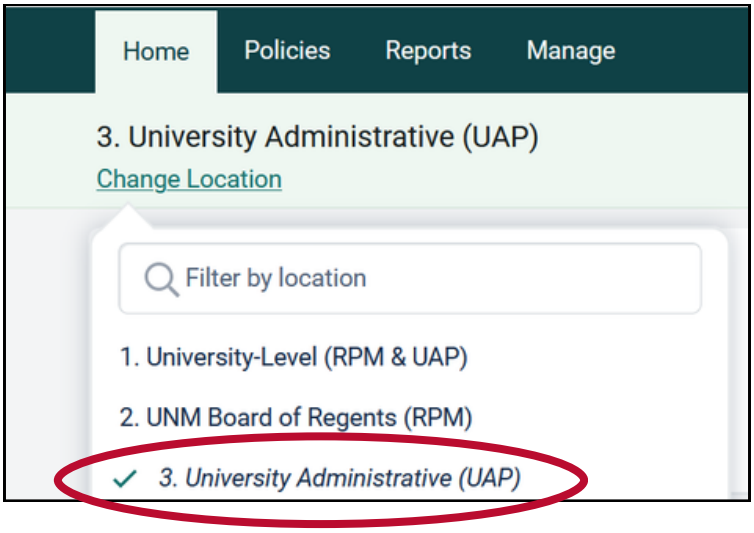
This will take you to the Policies Due for Review dashboard, that includes all policies coming up for review, title, section, owner, and next review date.



Review and Edit a Policy

Editing a Policy: How do I edit a Policy?

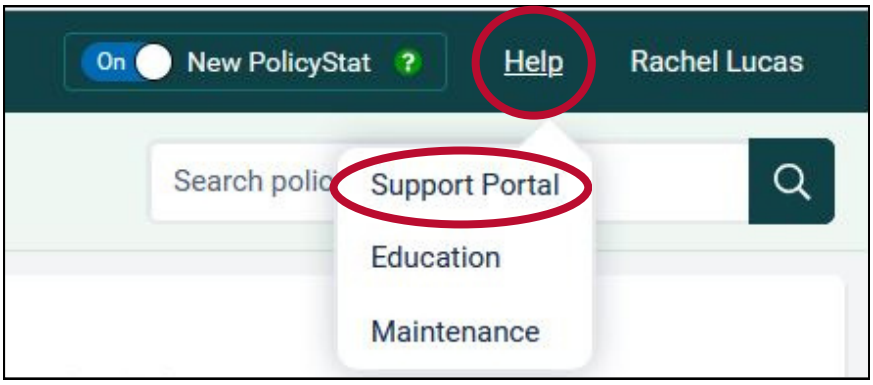
Be sure you are in the **University Administrative (UAP)** site. If not, click **Change Location** and select it.



Open the policy you wish to edit and click **Edit** or **Review** in the top bar.



You will then be taken to the **Editor** for that policy. Please use the following pages as a guide for editing and also the PolicyStat **Support Portal** located under **Help** as a resource during the editing and approval process.

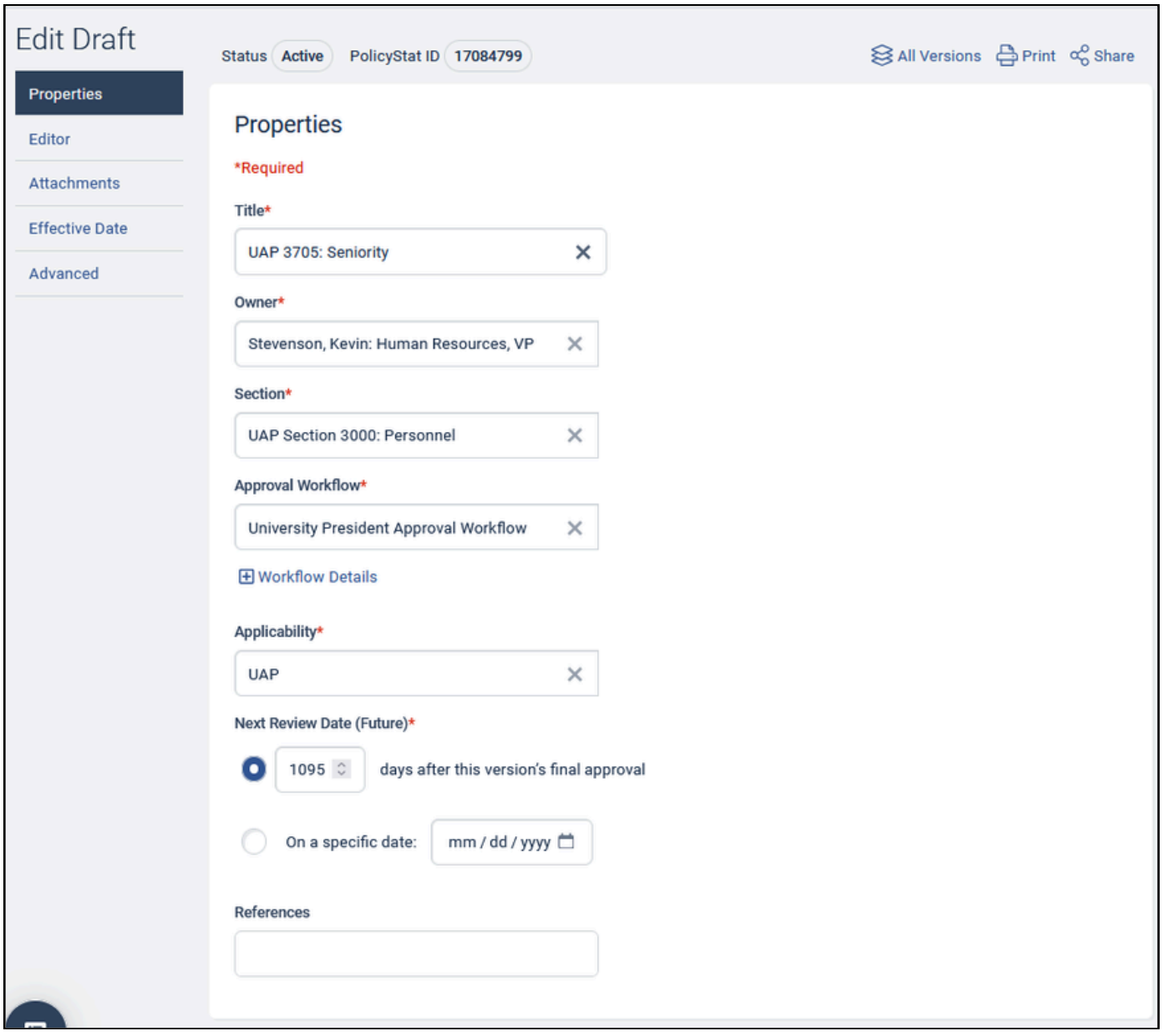


Policy Properties: Properties and Content

Once you have started the edit process, there are five separate areas to address, the first being **Policy Properties**. In this section, you will fill out the following information:

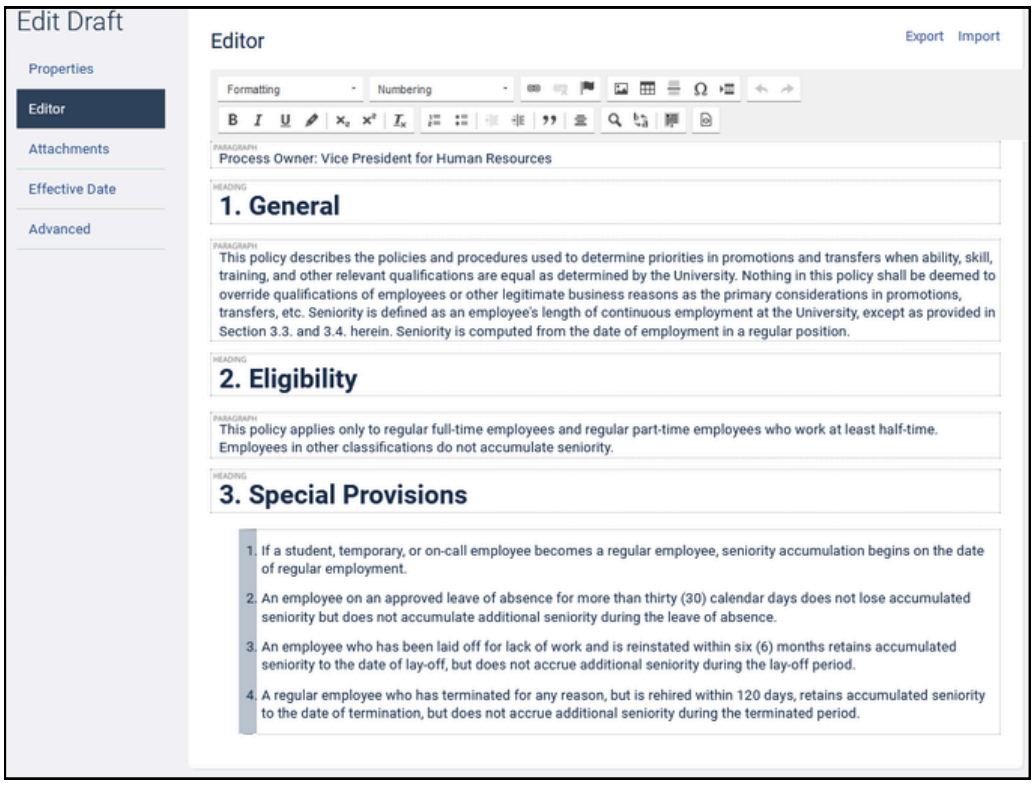
- **Title**
- **Owner**
- **Section**
- **Approval Workflow**.
- **Applicability**
- **Next Review Date**
- **References**

Please Note: If requesting change, consult with the Policy Office before editing.



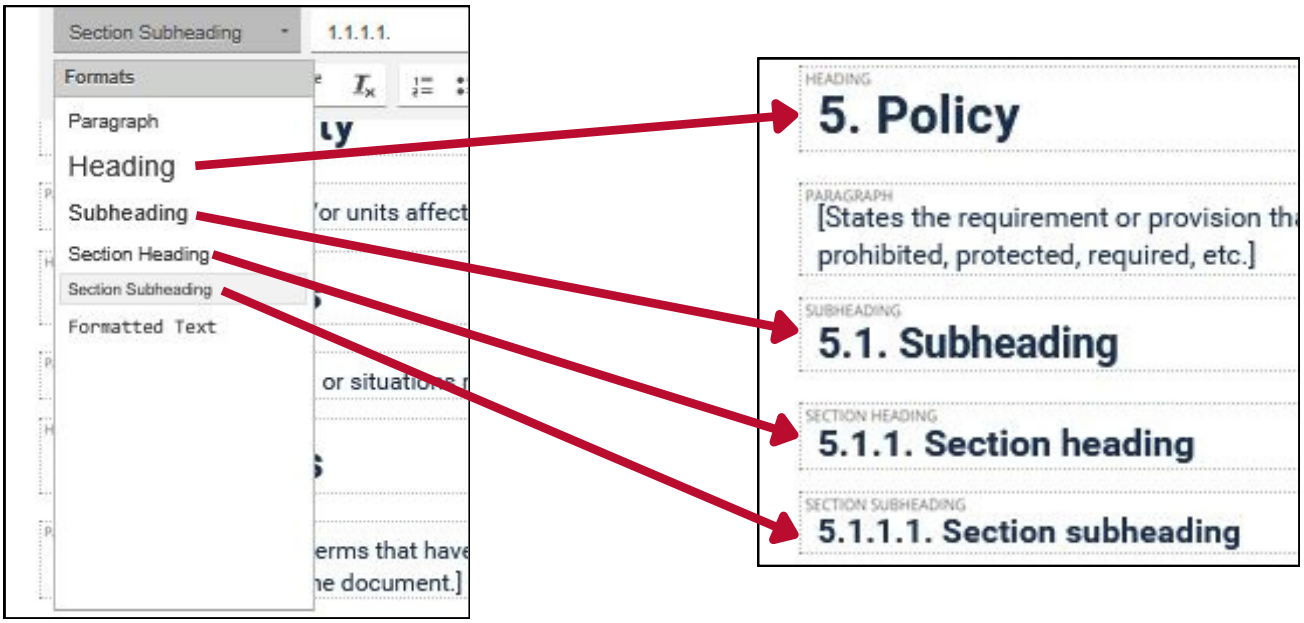
Editor: 101 Basics Handout

The next section is Editor. Here is where the content of the policy should be added.



Sub-headings

The PolicyStat Editor can go four (4) levels deep. Select the Formatting at the top and then one of the headings as appropriate.



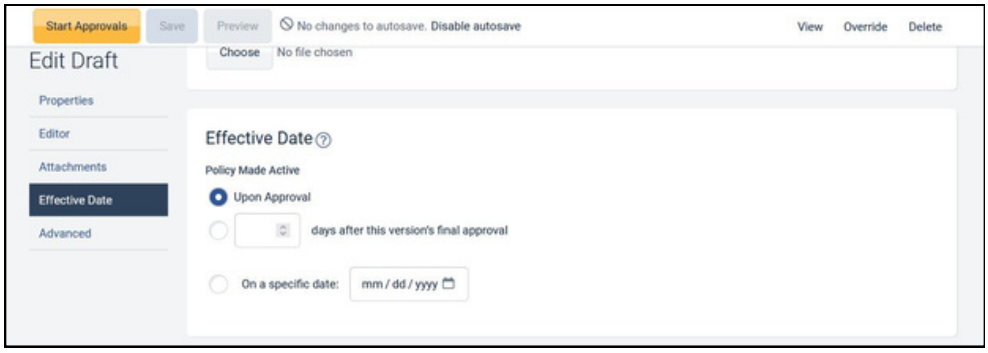
Attachments: Attachments and Images

The use of attachments is not a requirement but may be useful in some instances. Upload an attachment to a document by following the instructions found in **Attachments**. It can be renamed/replaced at any time. If attachments are referenced in the document as appendices, ensure they are named accordingly.



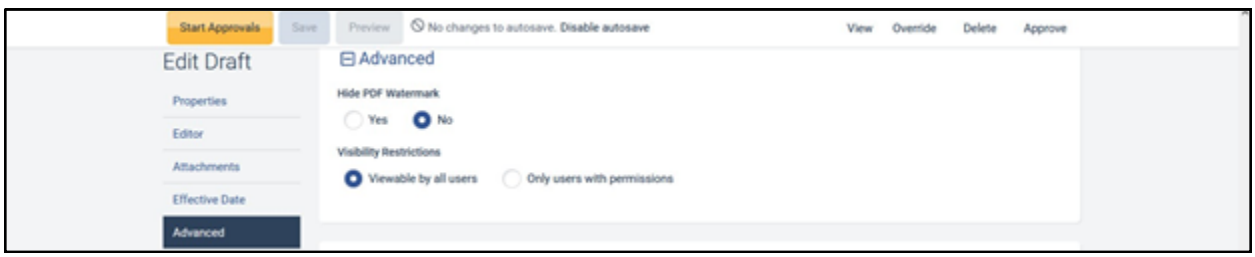
Effective Date

Policies may be set to take effect upon approval, on a specific date, or upon a certain number of days after the last approval. **The standard is "Upon Approval".** Contact the Policy Office before making changes to this section



Advanced

These settings are managed by the Policy Office and are applicable only in certain instances. Contact the Policy Office before making changes to this section.

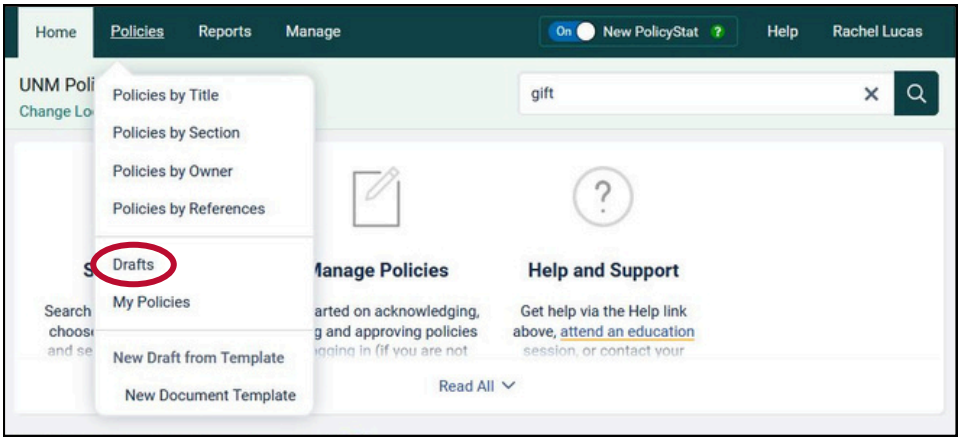


Draft Policies

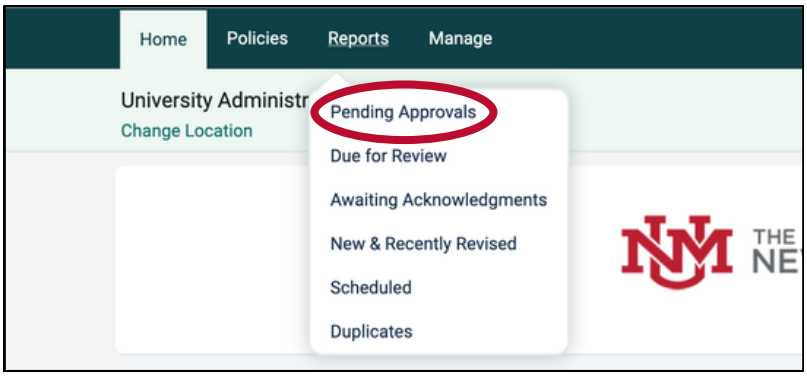
Accessing Drafts

You must have permissions to view pending policies. Users will only see pending policies if they are owners/designated co-editors for that policy.

From the Draft List:
Open the **Policies** menu in the top navigation bar and select **Drafts**.



From Pending Approval Report:
Open the **Reports** menu in the top navigation bar and select **Pending Approvals**.



As an owner, all of your pending policies will display by default.

If you a Co-Editor, you can also see policies pending approval by selecting **Everyone's** at the top of the report. You will see any policy pending approval that you have create and edit access in (e.g. section 2000). Use the filter to narrow the list of policies or manually locate the policy in question. Click the policy title to open it.

From Within a Policy Version:
A policy's status can be Active, Pending, Draft, Old, Old Draft, or Retired. For more information on each status, see What do these Statuses Mean?

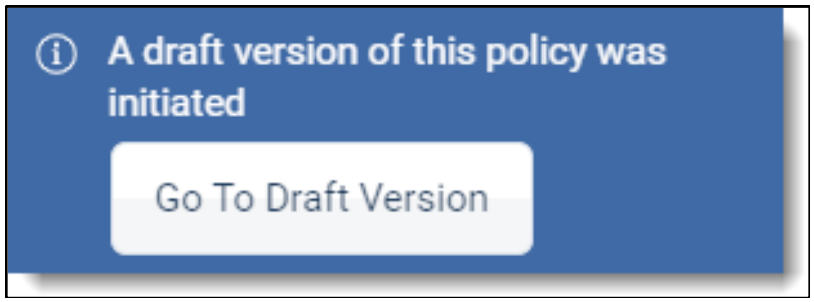


As a policy moves through an Approval Workflow, it will exist both as Pending and potentially as one or more Drafts. Follow this procedure to make sure that you are viewing the version most appropriate for your role in the approval process. The most recent changes are always going to be on the draft version.

View Pending Version from Active Version:
From the active version of the policy, click the **Go To Version Pending Approval** button in the bottom-right pop-up.



View Draft Version from Pending Version:
From the pending policy, click the **Go To Draft** Version button in the bottom-right pop-up.



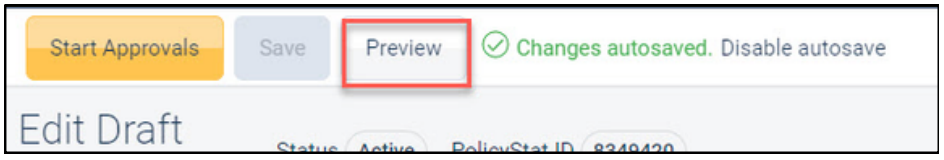
Helpful Related Links

- Where Do I Find Pending and Draft Policies?

Preview a Draft: How Do I Preview a Draft?

To preview what a draft policy will look like in its final form, click the **Preview** button at the top of the draft page.

Please Note: The Preview button will only be enabled if the policy has been edited.



The Preview will open and allow for testing of hyperlinks, text alignment checks, and table appearance.

To see track changes of a draft, please see the **Track Changes** section in this guide.

Delete a Draft

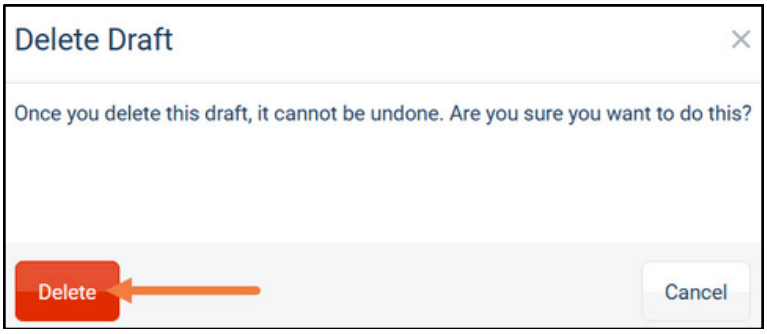
Deleting a draft will not impact or delete the active or pending versions of that policy if they exist.

After deleting a draft, if a pending or active version exists, selecting **Edit** or **Review** will create that content as a new draft.

While in Draft:
To delete an existing draft of a policy from within the draft, click the **Delete** button found at the top right of the page.

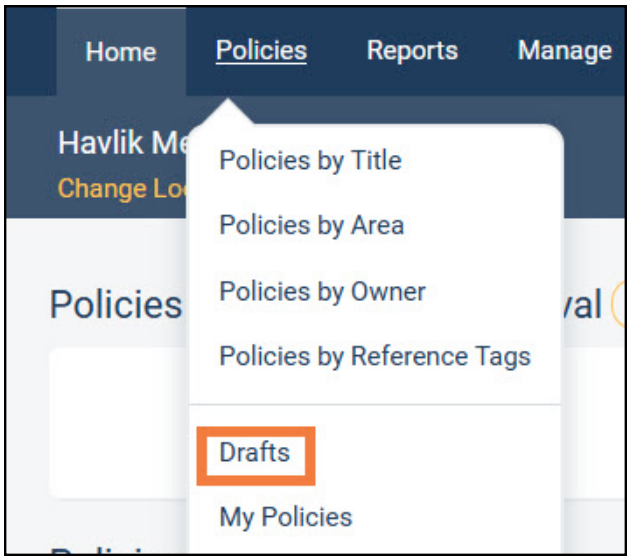


After clicking Delete, confirm you wish to delete it in the pop-up

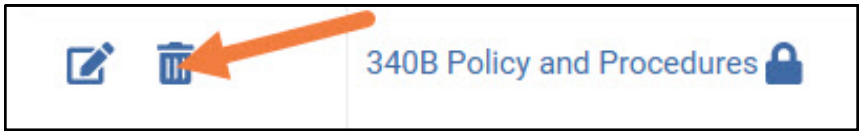


OR

Navigate to the drafts list under **Policies**.



Click on the garbage can icon to delete the draft.



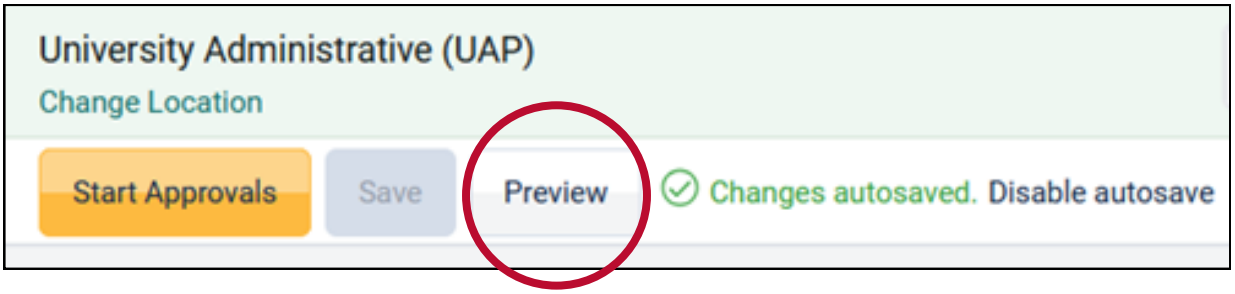
A deleted draft can be restored by **contacting PolicyStat Support**. Please provide the exact title or PolicyStat ID number of the draft to be restored.

Track Changes

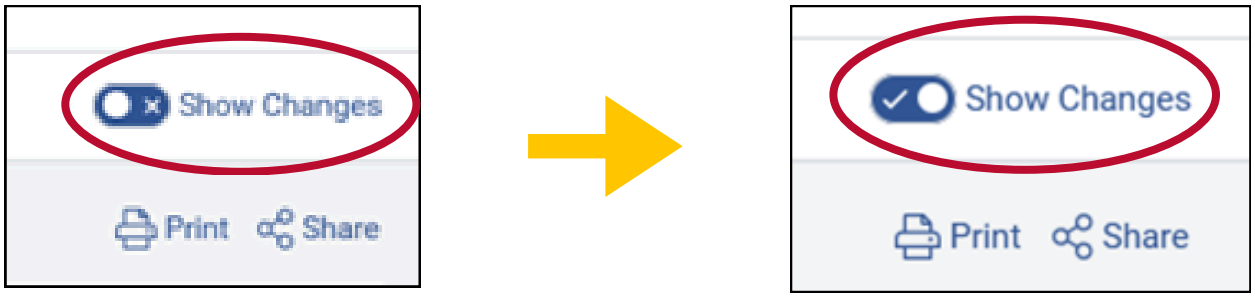
View Changes on a Policy While Editing

Please Note: When editing a document that has changes from a pending version the changes can't be seen in pending mode until the modified draft is submitted through the approval process.

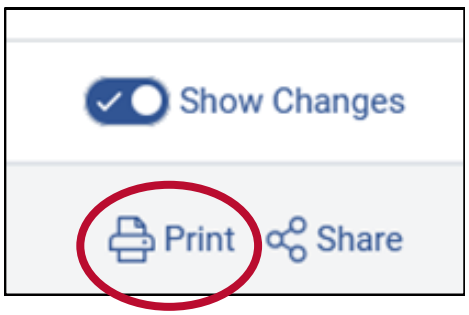
While in Edit mode and after changes have been made and autosaved, click the **Preview** button at the top left of the policy.

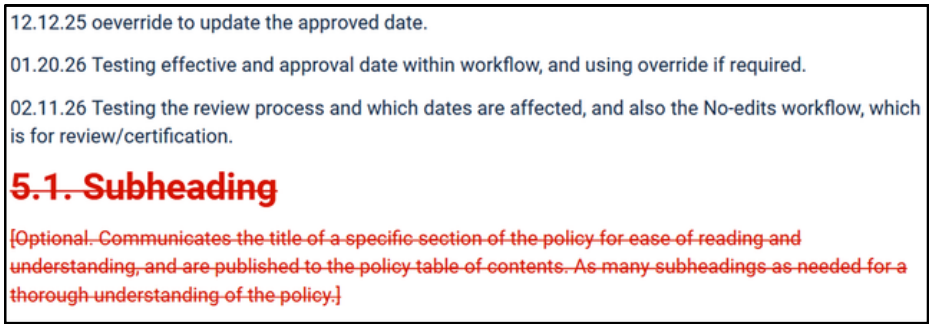


Select **Show Changes** button the top right side.



Click the **Print** icon (small icon) at the very top of the header to generate the PDF view of the track changes that can be printed, saved, and shared as needed.




12.12.25 oeverride to update the approved date.

01.20.26 Testing effective and approval date within workflow, and using override if required.

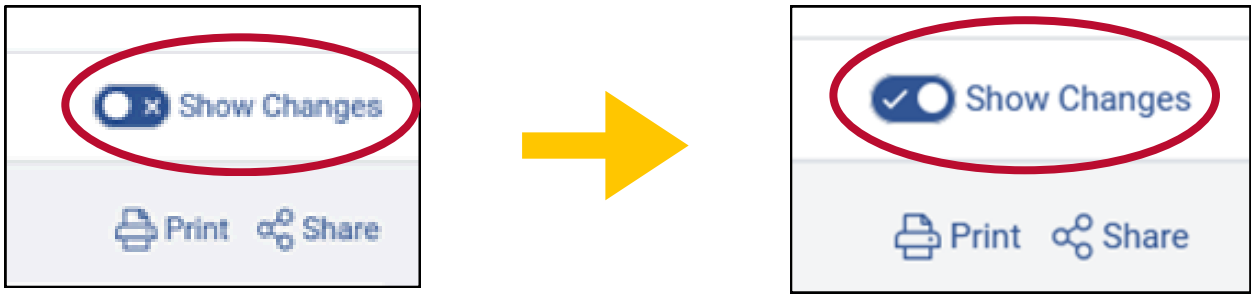
02.11.26 Testing the review process and which dates are affected, and also the No-edits workflow, which is for review/certification.

~~5.1. Subheading~~

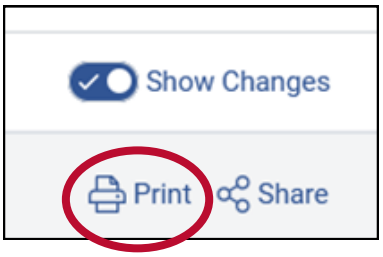
~~[Optional. Communicates the title of a specific section of the policy for ease of reading and understanding, and are published to the policy table of contents. As many subheadings as needed for a thorough understanding of the policy.]~~

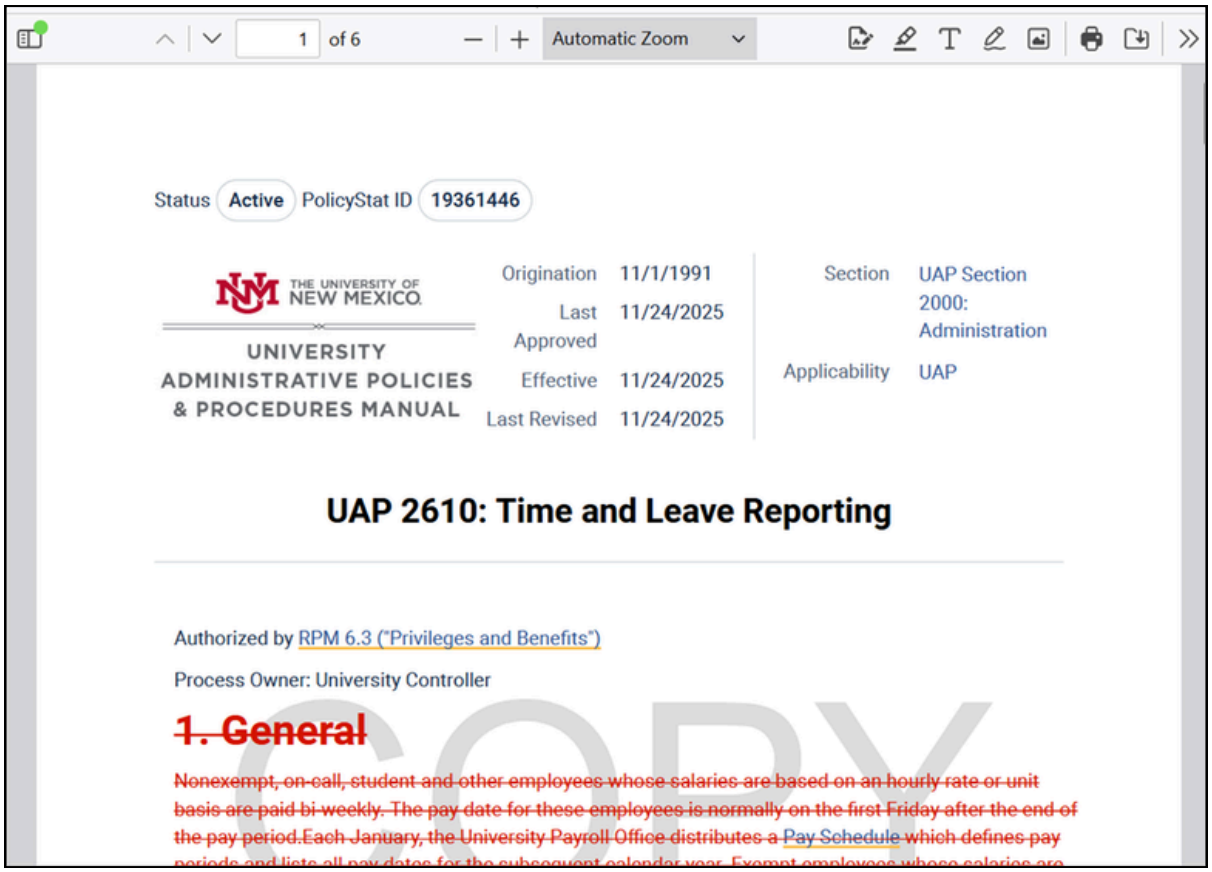
View Changes on an Active Policy or Historical Version

Select the Show Changes button the top right side.



Click the **Print** icon (small icon) at the very top of the header to generate the PDF view of the track changes that can be printed, saved, and shared as needed.

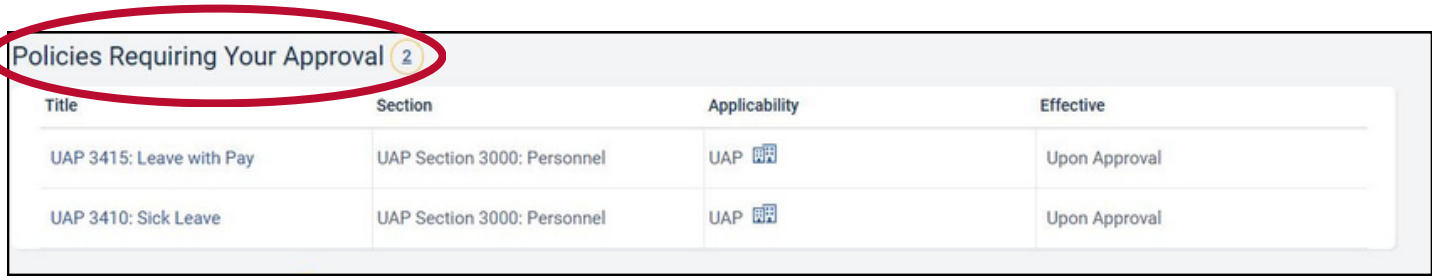




Policies Requiring Your Approval

Policies in this section require your action. To access one policy at a time, select the title of the policy from the list. To access the list of all policies that require your approval, select the circled number next to **Policies Requiring Your Approval.**

- **How do I see the policies requiring my approval?**

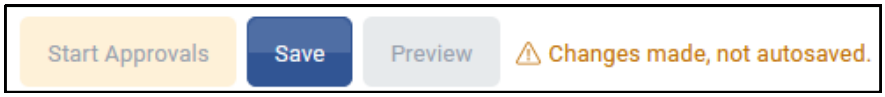


Selecting the circled number next to **Policies Requiring Your Approval** will provide access to a report of policies that includes title, section, who needs to approve it, step description, how long policy has been waiting on this particular step and the revision category (new, revised or unchanged).



Starting Approvals: How are Approval Workflows Started?

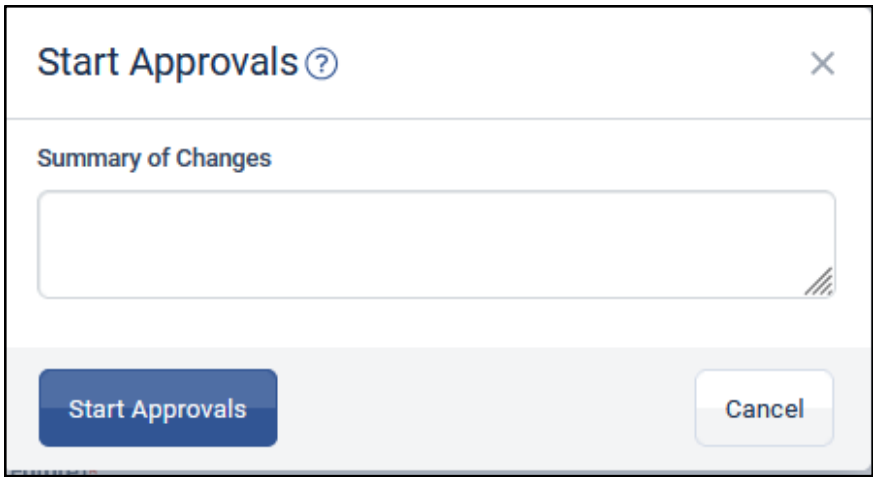
Ensure your Draft is saved before navigating away from the page. Autosave runs every few seconds.





Please Note: Do not click "Start Approvals" until instructed to do so by the Policy Officer. Once you have finished editing your policy and have confirmed with the Policy Officer it is ready to route for approval, click **Start Approvals**.

Enter in the summary and purpose of changes in the dialogue box. *This will become a part of the policy's historic record*, so please be accurate and brief.



Confirm starting the process by clicking Start Approvals.

- When the final **Approver** provides their approval, the policy becomes active in PolicyStat.
  - The final Approver is the University President.

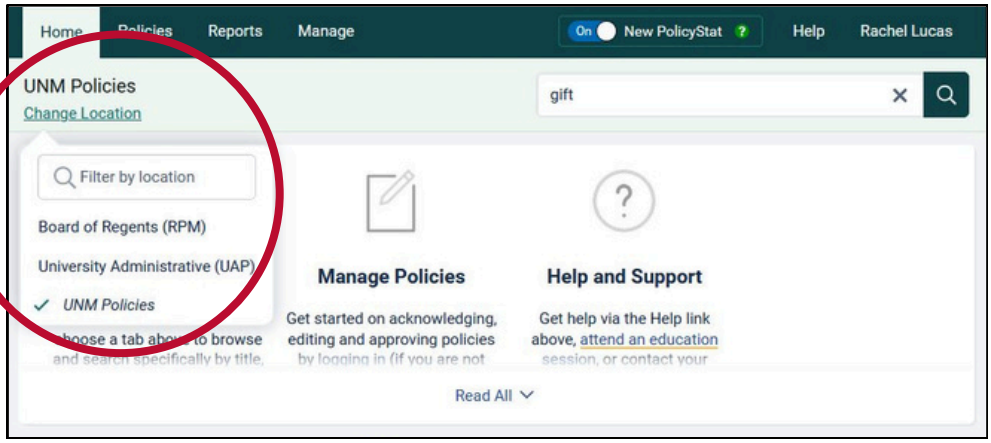
Search Features

PolicyStat offers full text-based search functionality of all policies. Policies are searchable by keyword in either the title or within the policy itself. Results are shown in a quick drop-down menu or in the full search page by order of relevance upon clicking the Search "magnify glass" button.

- **How do I Search for Policies?**

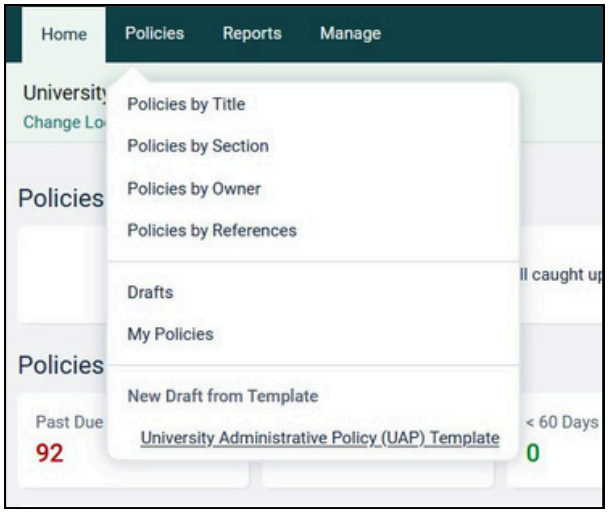
Please Note: For logged in users, the search function is impacted by what site you have selected.

- **Board of Regents (RPM):** Shows only RPM manual
- **University Administrative (UAP):** Shows only UAP manual
- **UNM Policies:** Shows both RPM and UAP manuals



A user can search in a few different ways:

- **Policies by Title**
- **Policies by Section**
- **Policies by Owner**
- **Policies by References:** UNM Policy Manuals do not currently use this feature



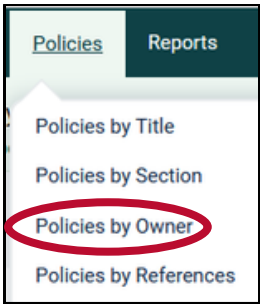
Search By Owner

The Owner tab will show only approved, active policies. Owners who only have Draft or Pending policies will not show up in the owner search list until they have at least one active policy. To view Draft and Pending documents by Owner go to the Draft and Pending Approval sections.

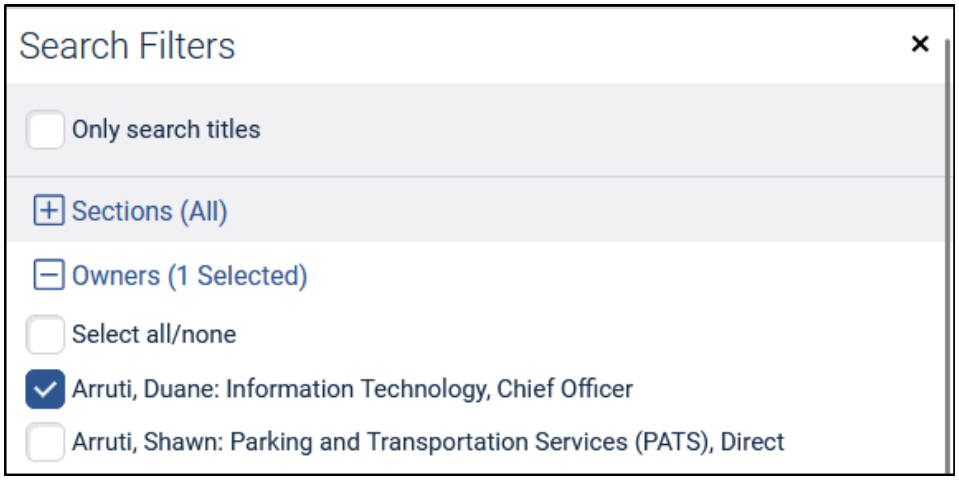
Please Note: For logged in users, the search function is impacted by what site you have selected.

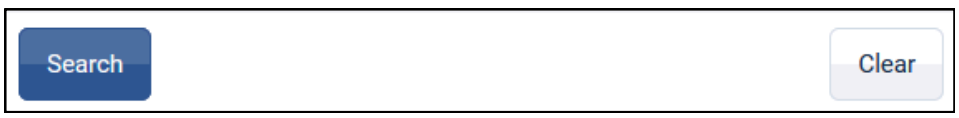
- **Board of Regents (RPM):** Shows only RPM manual
- **University Administrative (UAP):** Shows only UAP manual
- **UNM Policies:** Shows both RPM and UAP manuals

Click the **Policies** tab at the top of the page and select **Policies by Owner**.

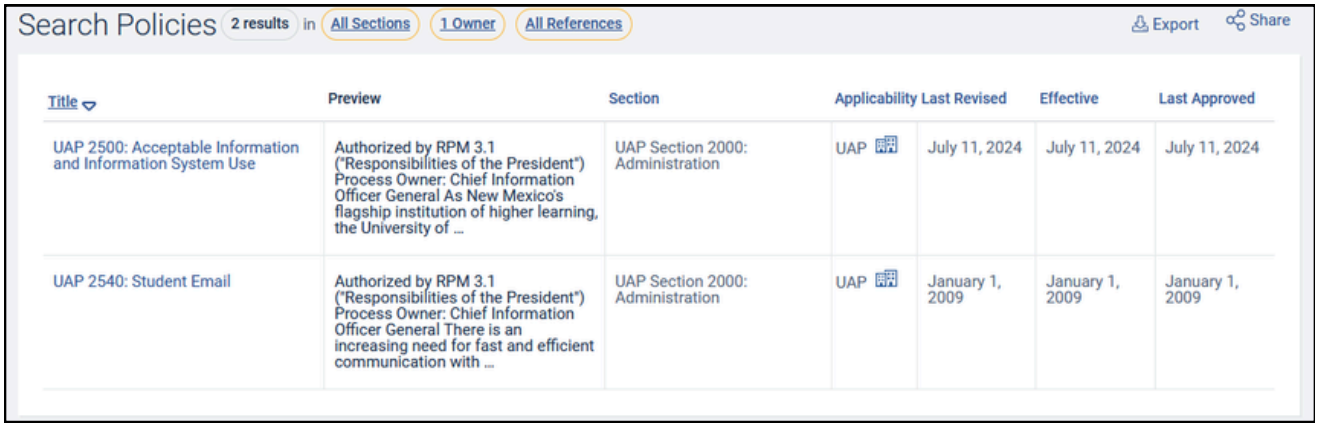


Select an owner's name by checking the desired box. Click **Search** at the bottom left of the search filter.





The complete list of active polices owned by that user will then populate.

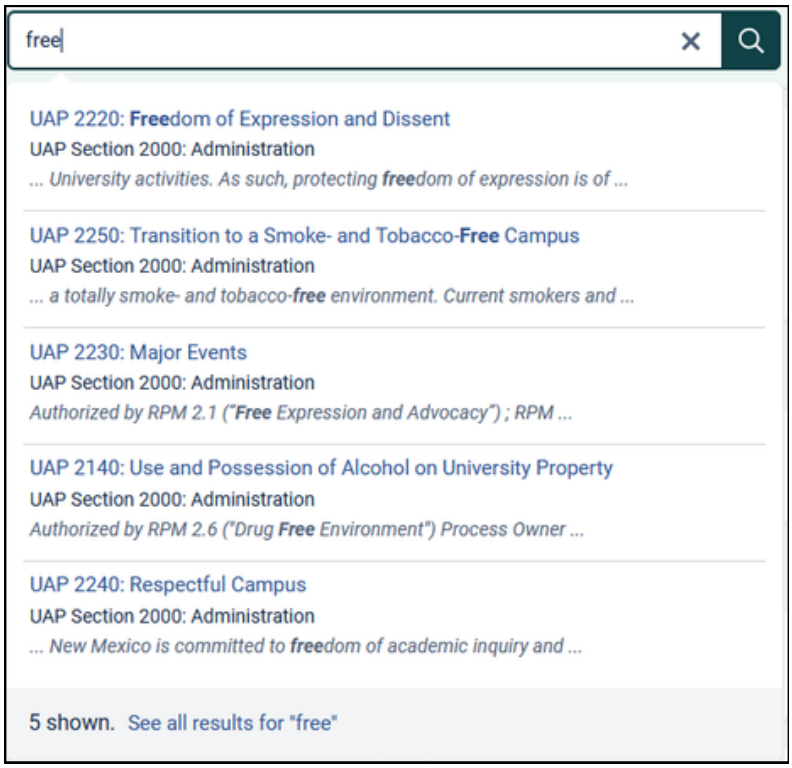


Searching by Terms, Phrases, etc.

A full-text search through PolicyStat's search bar works like most other Internet searches. The search bar located at the top of each page displays the top 5 most relevant results for the search criteria

Please Note: For logged in users, the search function is impacted by what site you have selected.

- **Board of Regents (RPM):** Shows only RPM manual
- **University Administrative (UAP):** Shows only UAP manual
- **UNM Policies:** Shows both RPM and UAP manuals



Root Word Search

A search for policies containing the term “medication” displays the most relevant results at the top. PolicyStat’s search engine recognizes root word similarities in terms to provide a full scope of results. A search for “medication” can also provide results for “medicate”, “meds”, “medicine” or even “medical”.

Typo Correction

The search suggestion recognizes minor spelling errors and adjust accordingly. For example, entering "habd" in the search bar will recognize that the intended search term was "hand" and produce relevant results.

Exact Text Match

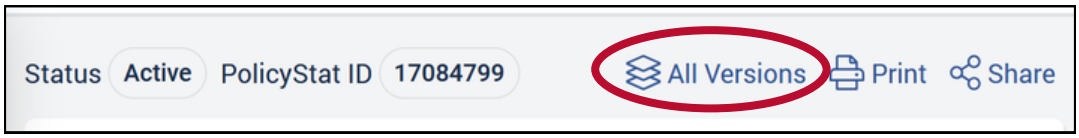
When using any of our search options, entering terms surrounded by quotes will return all results with that exact phrase or term in the text of the policy, in addition to applying your chosen filter. Not adjusting the advanced filter will return all results that include the exact phrase within the quotes.

Historical Versions

As we revise and publish policies in PolicyStat, we will begin to build an online, publicly accessable historical version database. For any pre-PolicyStat versions, please reach out to the Policy Office. Otherwise you can find historical version, with optional redlines, availably on each policy page.

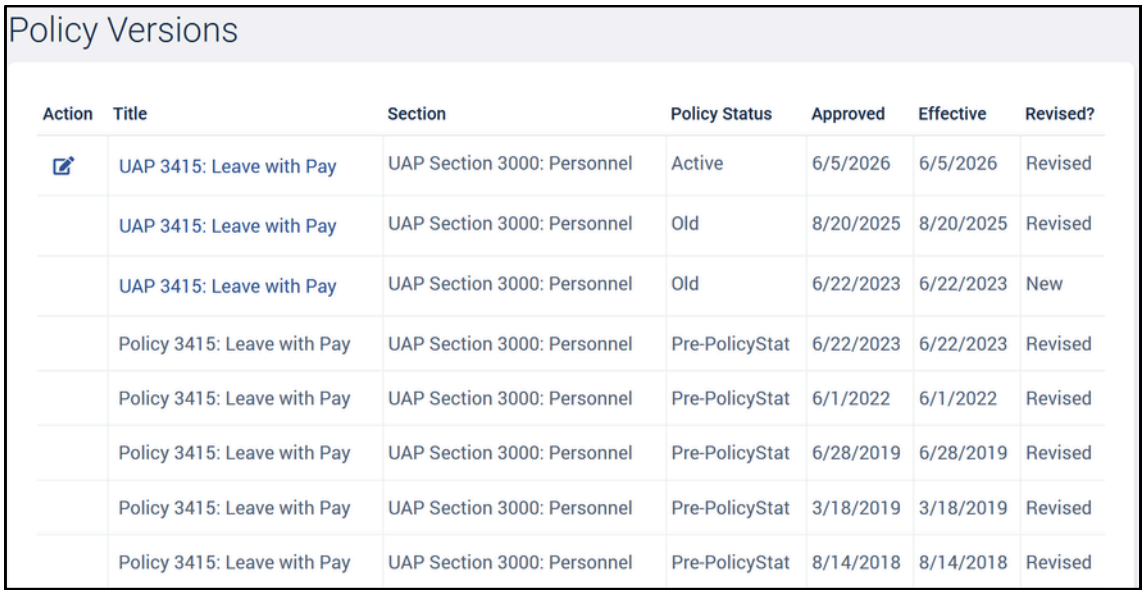
All Versions

Navigate to the policy you would like the historical records for. Then click **All Versions** in the top right hand corner.



Any previous versions for that policy will be listed. It will say either:

- **Active:** Current version published on PolicyStat.
- **Old:** A previous version published on PolicyStat.
- **Pre-PolicyStat:** A previous version published on the legacy system. Contact Policy Office for these records.



Action	Title	Section	Policy Status	Approved	Effective	Revised?
	UAP 3415: Leave with Pay	UAP Section 3000: Personnel	Active	6/5/2026	6/5/2026	Revised
	UAP 3415: Leave with Pay	UAP Section 3000: Personnel	Old	8/20/2025	8/20/2025	Revised
	UAP 3415: Leave with Pay	UAP Section 3000: Personnel	Old	6/22/2023	6/22/2023	New
	Policy 3415: Leave with Pay	UAP Section 3000: Personnel	Pre-PolicyStat	6/22/2023	6/22/2023	Revised
	Policy 3415: Leave with Pay	UAP Section 3000: Personnel	Pre-PolicyStat	6/1/2022	6/1/2022	Revised
	Policy 3415: Leave with Pay	UAP Section 3000: Personnel	Pre-PolicyStat	6/28/2019	6/28/2019	Revised
	Policy 3415: Leave with Pay	UAP Section 3000: Personnel	Pre-PolicyStat	3/18/2019	3/18/2019	Revised
	Policy 3415: Leave with Pay	UAP Section 3000: Personnel	Pre-PolicyStat	8/14/2018	8/14/2018	Revised

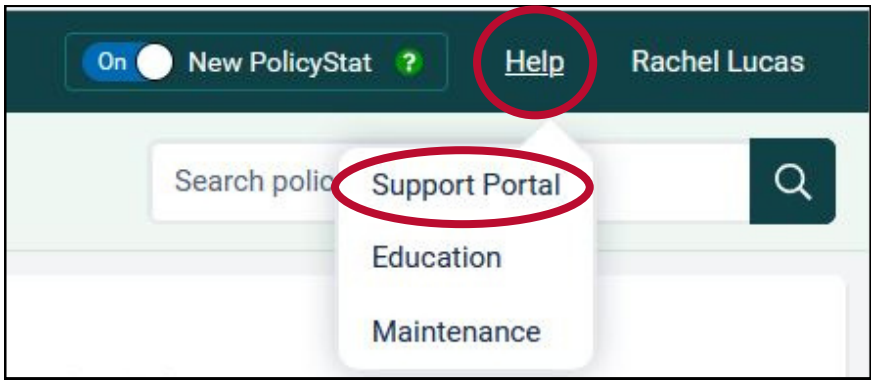
A previous version policy has the same functionality as any other policy on PolicyStat. You are able to share, print, and view track changes. Please see those sections in this manual for more details on those processes.

Help and Support

You can contact the Policy Office Directly at **policy@unm.edu** or use the PolicyStat Help Portal (https://rldatix-public.zendesk.com/hc/en-us).

Support Portal

The Support Portal is a resource for policy owners and designated co-editors to search for and quickly find answers to all questions regarding the new system. Click **Help** and then **Support Portal**.



You will then be taken to the home page for the PolicyStat Support Portal. We encourage you to utilize this resource and reach out to our office if your questions are still unanswered.

