

PolicyStat Navigation Guide

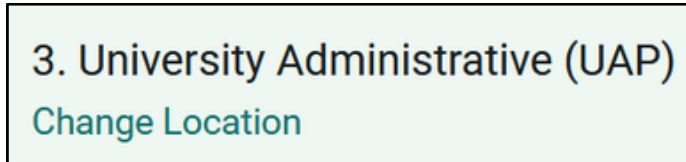
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Get Started

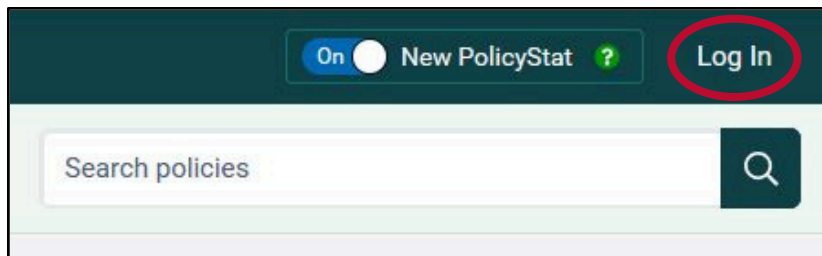
Site Selection

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)**

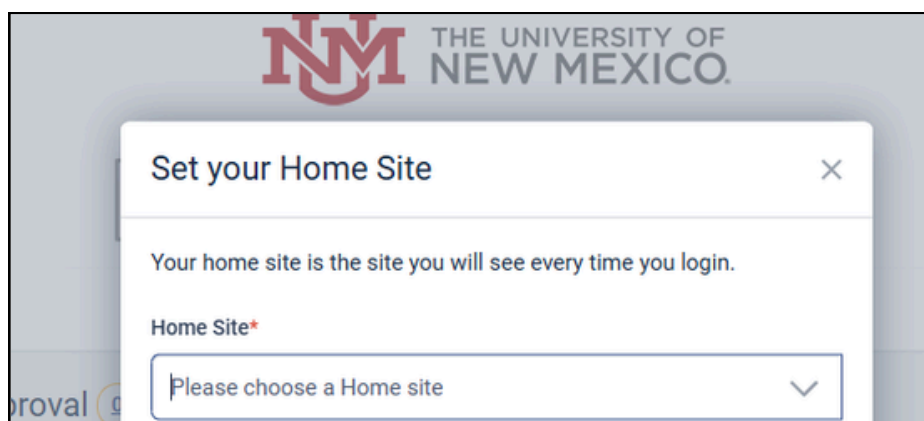


Logging In (Owners, Editors, Co-Editors, etc.)

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.

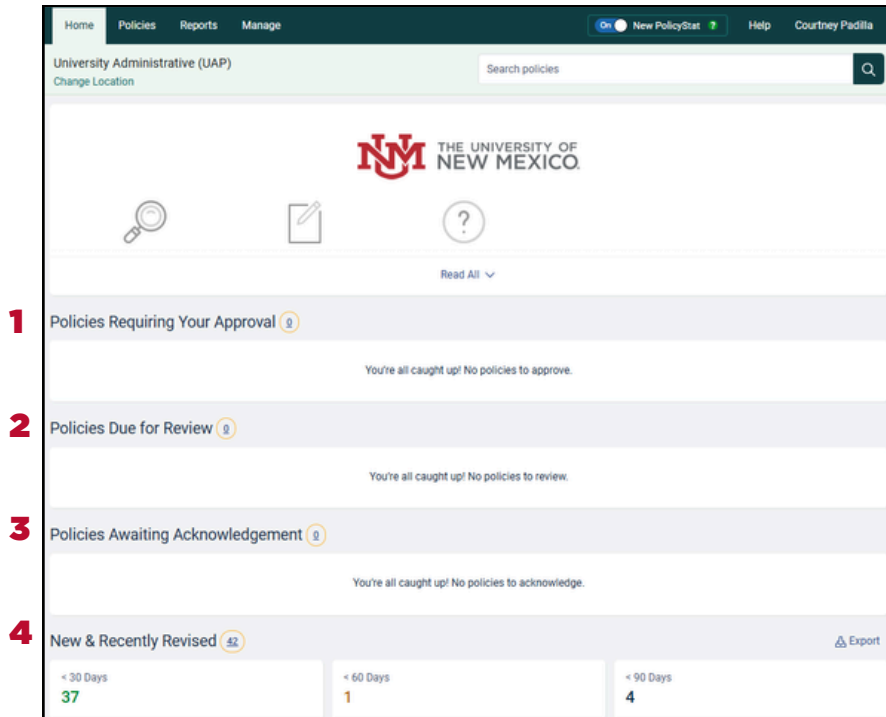
Helpful Related Links

- [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?](#)

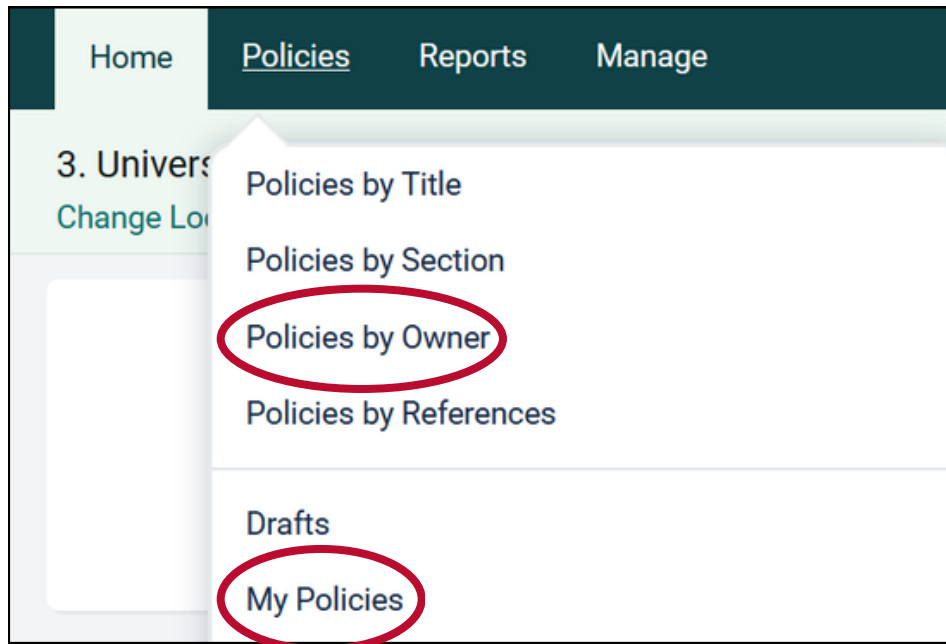
Helpful Related Links

- [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.

Policies Due for Review 63			
Past Due 62	< 30 Days 0	< 60 Days 0	< 90 Days 1
> 90 Days 114			
Title	Section	Applicability	Next Review
UAP 3705: Seniority	UAP Section 3000: Personnel	UAP	October 31, 1994
UAP 3000: Guiding Principles	UAP Section 3000: Personnel	UAP	January 28, 2002

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.

Policies Due for Review

RSS Feed

Export

Past Due

62

< 30 Days

0

< 60 Days

0

< 90 Days

1

> 90 Days

114

Everyone's

Just Mine

Showing 20 of 63 results

Filter by keyword

In Approval Process

?

Area

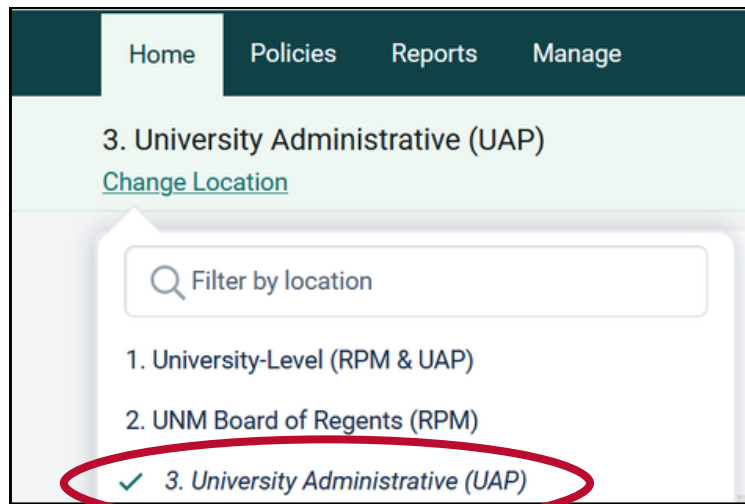
Expiration

☐	Title	Preview	Section	Applicability	Owner	Next Review
☐	UAP 3705: Seniority	Process Owner: Vice President for Human Resources General This policy describes the policies and procedures used to determine priorities in promotions and transfers when ability, ...	UAP Section 3000: Personnel	UAP	Stevenson, Kevin: Human Resources, VP	October 31, 1994
☐	UAP 3000: Guiding Principles	Process Owner: Vice President for Human Resources General The principles in this policy are based on the University's mission and values as expressed in the ...	UAP Section 3000: Personnel	UAP	Stevenson, Kevin: Human Resources, VP	January 28, 2002

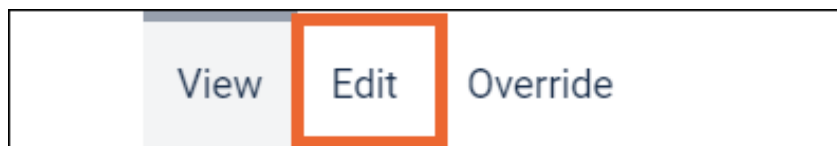
Review and Edit a Policy

Editing a Policy: [How do I edit a Policy?](#)

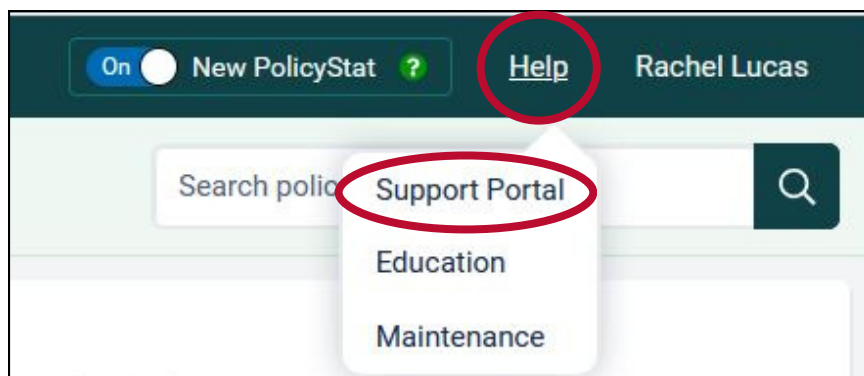
Be sure you are in the **University Administrative (UAP)** site. If not, click **Change Location** and select it.



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.

Edit Draft

Properties

Editor

Attachments

Effective Date

Advanced

Status **Active** PolicyStat ID 17084799

[All Versions](#) [Print](#) [Share](#)

Properties

*Required

Title*

UAP 3705: Seniority

X

Owner*

Stevenson, Kevin: Human Resources, VP

X

Section*

UAP Section 3000: Personnel

X

Approval Workflow*

University President Approval Workflow

X

Workflow Details

Applicability*

UAP

X

Next Review Date (Future)*

1095

days after this version's final approval

On a specific date:

mm / dd / yyyy

References

Editor: 101 Basics Handout

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

The screenshot shows the 'Edit Draft' interface of the PolicyStat Editor. On the left is a sidebar with tabs: Properties, Editor (selected), Attachments, Effective Date, and Advanced. The main area is titled 'Editor' and contains a rich text editor. The document content is as follows:

Process Owner: Vice President for Human Resources

1. General

This policy describes the policies and procedures used to determine priorities in promotions and transfers when ability, skill, training, and other relevant qualifications are equal as determined by the University. Nothing in this policy shall be deemed to override qualifications of employees or other legitimate business reasons as the primary considerations in promotions, transfers, etc. Seniority is defined as an employee's length of continuous employment at the University, except as provided in Section 3.3. and 3.4. herein. Seniority is computed from the date of employment in a regular position.

2. Eligibility

This policy applies only to regular full-time employees and regular part-time employees who work at least half-time. Employees in other classifications do not accumulate seniority.

3. Special Provisions

1. If a student, temporary, or on-call employee becomes a regular employee, seniority accumulation begins on the date of regular employment.
2. An employee on an approved leave of absence for more than thirty (30) calendar days does not lose accumulated seniority but does not accumulate additional seniority during the leave of absence.
3. An employee who has been laid off for lack of work and is reinstated within six (6) months retains accumulated seniority to the date of lay-off, but does not accrue additional seniority during the lay-off period.
4. A regular employee who has terminated for any reason, but is rehired within 120 days, retains accumulated seniority to the date of termination, but does not accrue additional seniority during the terminated period.

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.

The diagram illustrates the hierarchy of sub-headings in the PolicyStat Editor. On the left, a 'Formats' menu is shown with the following options: Paragraph, Heading, Subheading, Section Heading, Section Subheading, and Formatted Text. The 'Section Subheading' option is selected, and its corresponding level '1.1.1.1.' is displayed. On the right, a sample document structure is shown with four levels of headings, each with a red arrow pointing from the 'Formats' menu to it:

- 5. Policy** (HEADING)
- 5.1. Subheading** (SUBHEADING)
- 5.1.1. Section heading** (SECTION HEADING)
- 5.1.1.1. Section subheading** (SECTION SUBHEADING)

Attachments: Attachments and Images

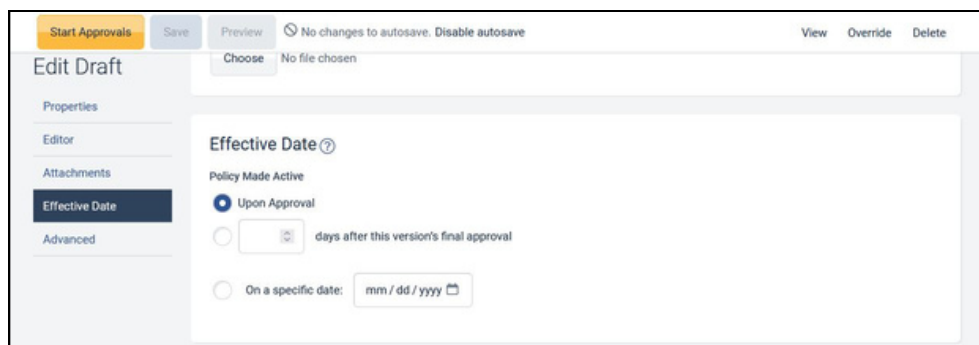
The use of attachments is not a requirement but may be useful in some instances. Upload an attachment to a document by following the instructions found in **Attachments**. It can be renamed/replaced at any time. If attachments are referenced in the document as appendices, ensure they are named accordingly.



The screenshot shows the 'Edit Draft' interface with the 'Attachments' tab selected in the left sidebar. The main content area has a header 'Attachments' and a sub-header 'Add Attachment'. Below this is a 'Choose' button and the text 'No file chosen'. At the bottom of the main content area is the 'Effective Date' field with a help icon.

Effective Date

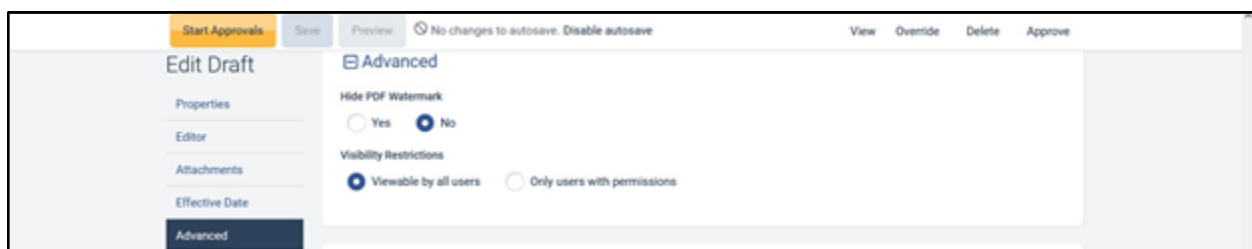
Policies may be set to take effect upon approval, on a specific date, or upon a certain number of days after the last approval. **The standard is “Upon Approval”**. Contact the Policy Office before making changes to this section



The screenshot shows the 'Edit Draft' interface with the 'Effective Date' tab selected in the left sidebar. The main content area has a header 'Effective Date' with a help icon. Below this is the 'Policy Made Active' section with three radio button options: 'Upon Approval' (selected), 'days after this version's final approval', and 'On a specific date: mm / dd / yyyy'. The 'On a specific date' option has a date picker icon.

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.



The screenshot shows the 'Edit Draft' interface with the 'Advanced' tab selected in the left sidebar. The main content area has a header 'Advanced'. Below this is the 'Hide PDF Watermark' section with two radio button options: 'Yes' and 'No' (selected). Below this is the 'Visibility Restrictions' section with two radio button options: 'Viewable by all users' (selected) and 'Only users with permissions'.

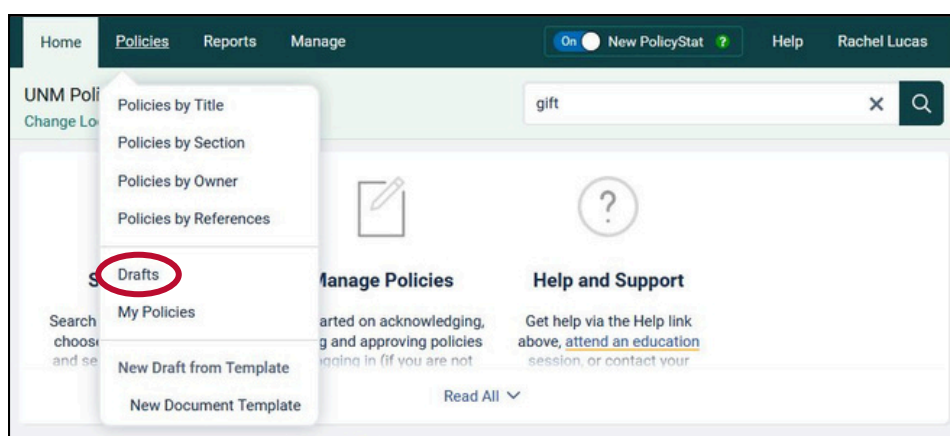
Draft Policies

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.

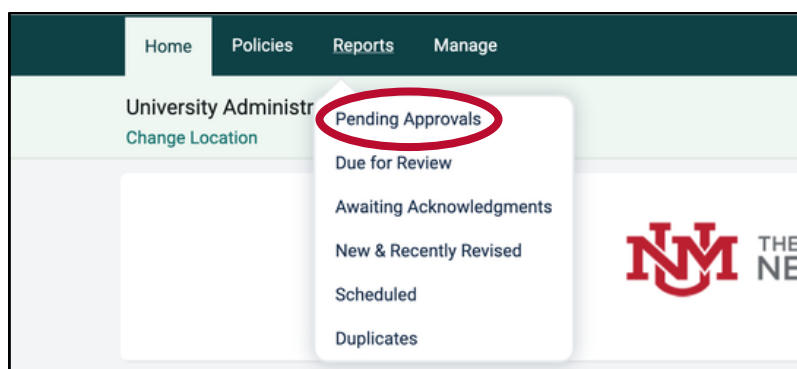
From the Draft List:

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 are 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.

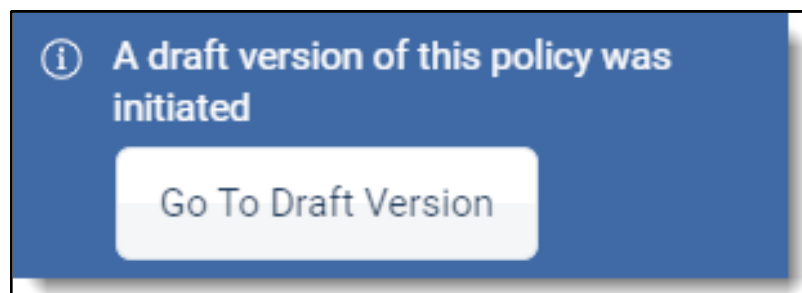
View Pending Version from Active Version:

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.



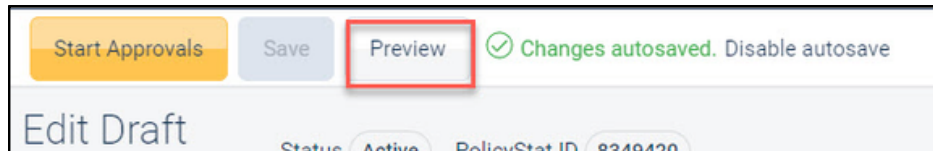
Helpful Related Links

- [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.

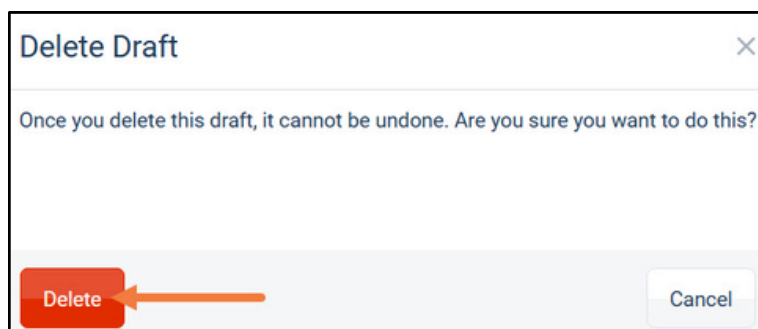
After deleting a draft, if a pending or active version exists, selecting **Edit** or **Review** will create that content as a new draft.

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.

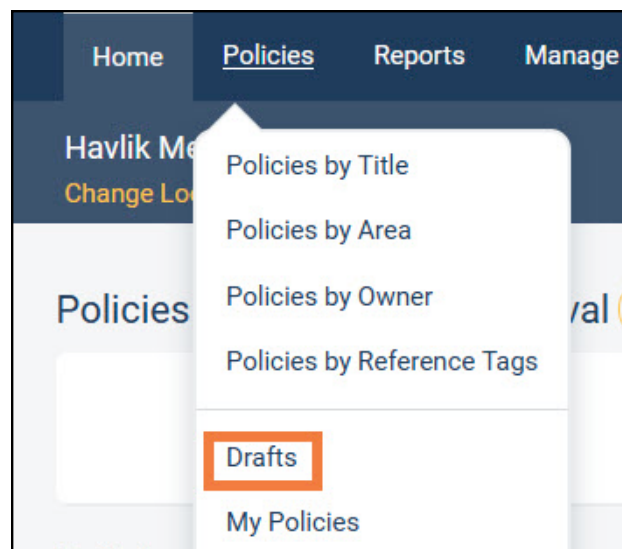


After clicking Delete, confirm you wish to delete it in the pop-up

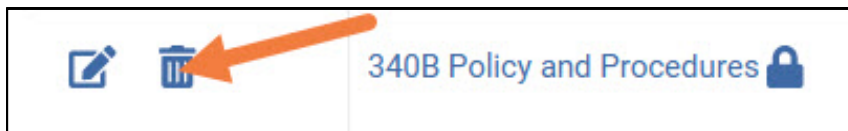


OR

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



Click on the garbage can icon to delete the draft.



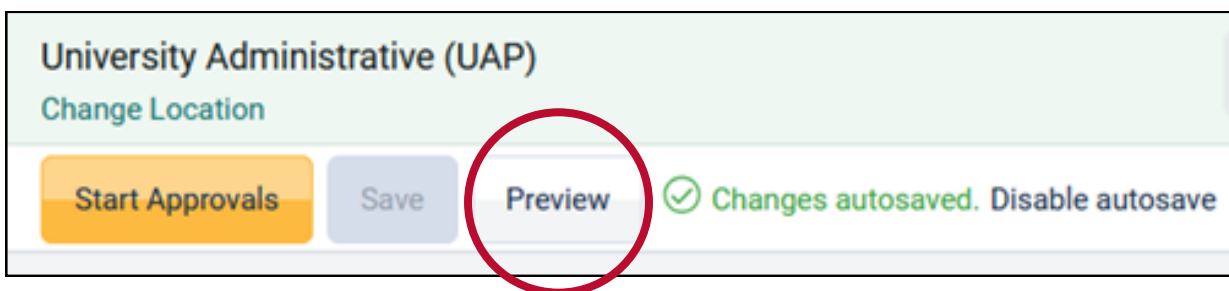
A deleted draft can be restored by [contacting PolicyStat Support](#). Please provide the exact title or PolicyStat ID number of the draft to be restored.

Track Changes

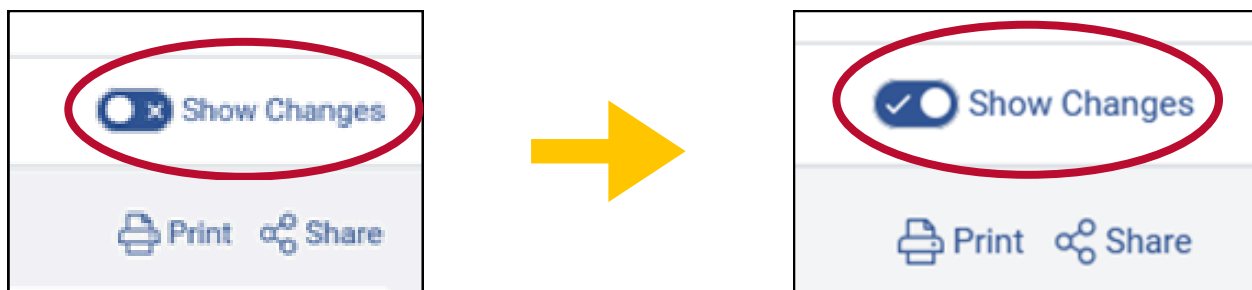
View Changes on a Policy While Editing

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.

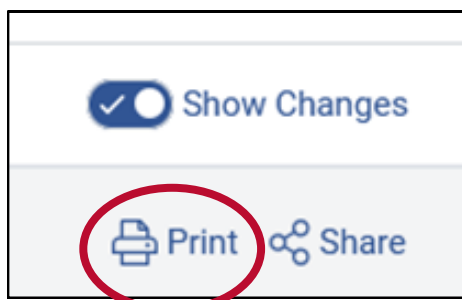
While in Edit mode and after changes have been made and autosaved, click the **Preview** button at the top left of the policy.



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.

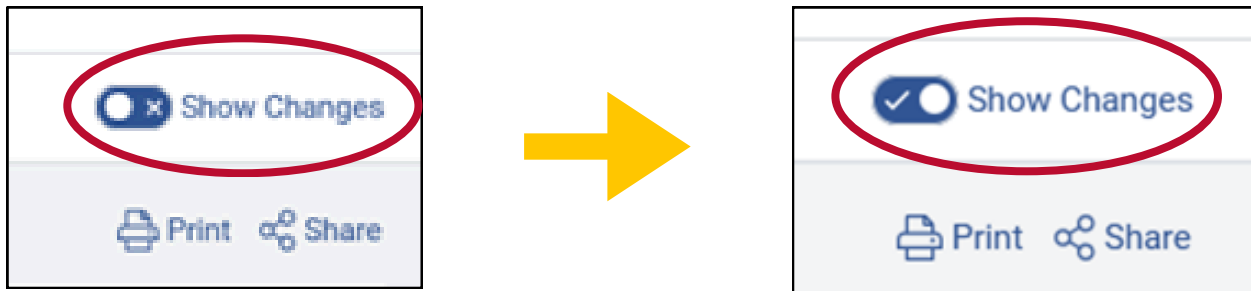
02.11.26 Testing the review process and which dates are affected, and also the No-edits workflow, which is for review/certification.

5.1. Subheading

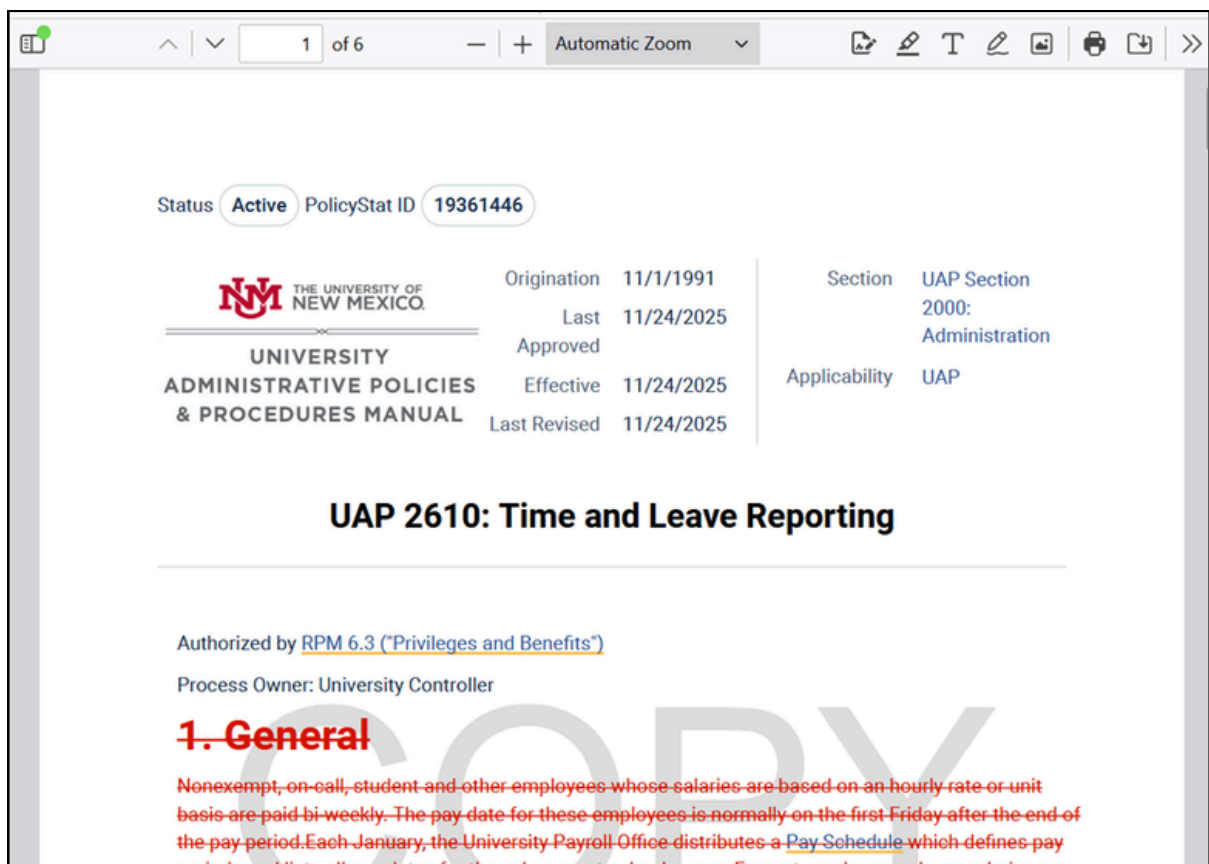
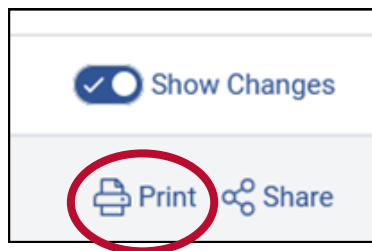
[Optional. Communicates the title of a specific section of the policy for ease of reading and understanding, and are published to the policy table of contents. As many subheadings as needed for a thorough understanding of the policy.]

View Changes on an Active Policy

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?](#)

Policies Requiring Your Approval 2			
Title	Section	Applicability	Effective
UAP 3415: Leave with Pay	UAP Section 3000: Personnel	UAP	Upon Approval
UAP 3410: Sick Leave	UAP Section 3000: Personnel	UAP	Upon 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).

Policies Pending Approval

Just Mine

Everyone's

Showing 2 of 2 results

Filter by keyword

Approver

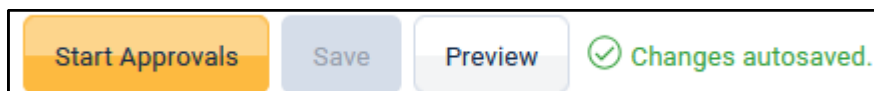
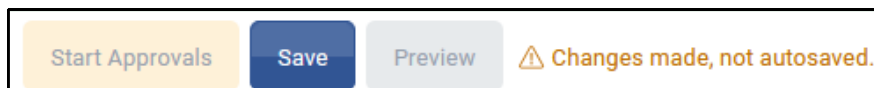
Applicability

☐	Title	Section	Applicability	Needed Approver	Step Description	Owner	Wait time	Revised?	Effective
☒	UAP 3410: Sick Leave	UAP Section 3000: Personnel	UAP	Mason- ✉ Coon, Sidney	Policy Office	Stevenson, Kevin: ✉ Human Resources, VP	about 1 hour	Revised	Upon Approval
☒	UAP 3415: Leave with Pay	UAP Section 3000: Personnel	UAP	Mason- ✉ Coon, Sidney	Policy Office	Stevenson, Kevin: ✉ Human Resources, VP	about 1 hour	Revised	Upon Approval

Export

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.

A dialog box titled 'Start Approvals' with a close button (X) in the top right corner. Below the title is a section labeled 'Summary of Changes' with a large text input field. At the bottom of the dialog are two buttons: 'Start Approvals' (dark blue) and 'Cancel' (light grey).

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.

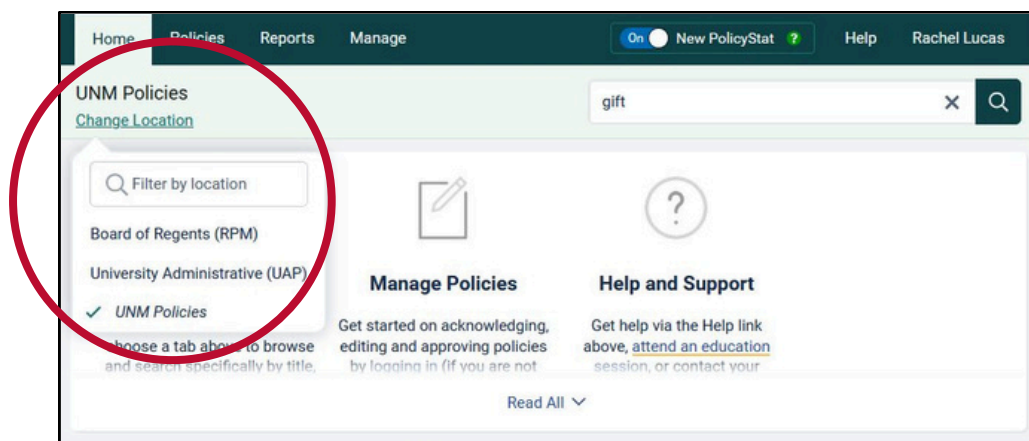
Search Features

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?](#)

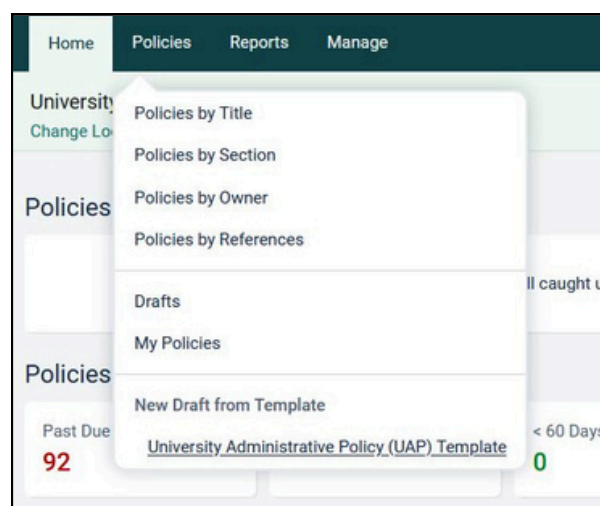
Please Note: For logged in users, the search function is impacted by what site you have selected.

- **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



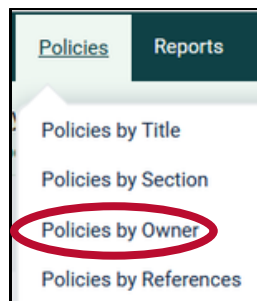
Search By Owner

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.

Search Filters

☐ Only search titles

☒ Sections (All)

☒ Owners (1 Selected)

☐ Select all/none

☒ Arruti, Duane: Information Technology, Chief Officer

☐ Arruti, Shawn: Parking and Transportation Services (PATS), Direct

Search

Clear

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

Search Policies 2 results in All Sections 1 Owner All References Export Share							
Title	Preview	Section	Applicability	Last Revised	Effective	Last Approved	
UAP 2500: Acceptable Information and Information System Use	Authorized by RPM 3.1 ("Responsibilities of the President") Process Owner: Chief Information Officer General As New Mexico's flagship institution of higher learning, the University of ...	UAP Section 2000: Administration	UAP	July 11, 2024	July 11, 2024	July 11, 2024	
UAP 2540: Student Email	Authorized by RPM 3.1 ("Responsibilities of the President") Process Owner: Chief Information Officer General There is an increasing need for fast and efficient communication with ...	UAP Section 2000: Administration	UAP	January 1, 2009	January 1, 2009	January 1, 2009	

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

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UAP 2220: **Freedom of Expression and Dissent**
UAP Section 2000: Administration
... University activities. As such, protecting **freedom** of expression is of ...

UAP 2250: Transition to a Smoke- and Tobacco-**Free** Campus
UAP Section 2000: Administration
... a totally smoke- and tobacco-**free** environment. Current smokers and ...

UAP 2230: Major Events
UAP Section 2000: Administration
Authorized by RPM 2.1 ("**Free** Expression and Advocacy"); RPM ...

UAP 2140: Use and Possession of Alcohol on University Property
UAP Section 2000: Administration
Authorized by RPM 2.6 ("**Drug Free** Environment") Process Owner ...

UAP 2240: Respectful Campus
UAP Section 2000: Administration
... New Mexico is committed to **freedom** of academic inquiry and ...

5 shown. See all results for "free"

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

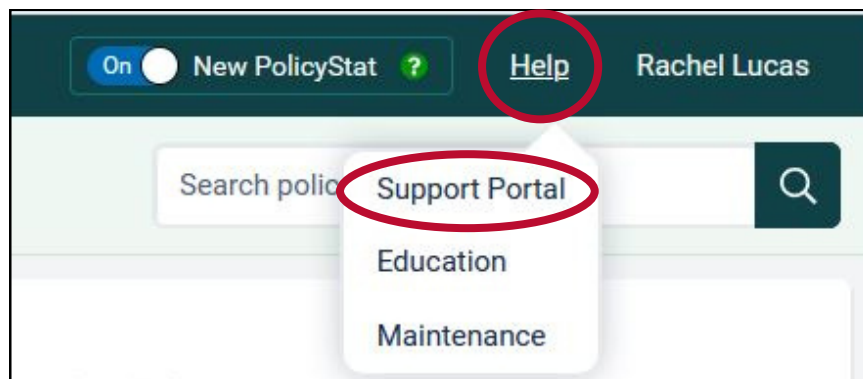
When using any of our search options, entering terms surrounded by quotes will return all results with that exact phrase or term in the text of the policy, in addition to applying your chosen filter. Not adjusting the advanced filter will return all results that include the exact phrase within the quotes.

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) (<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.

