PolicyStat Navigation Guide
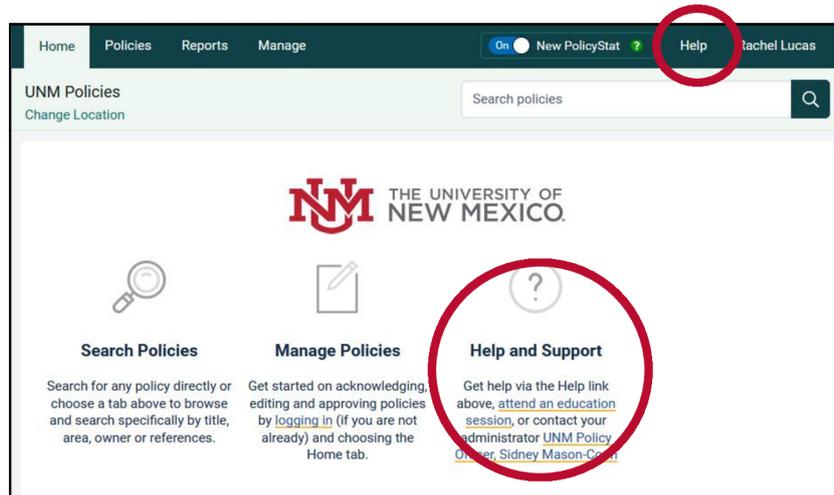
## Table of Contents

PolicyStat Navigation

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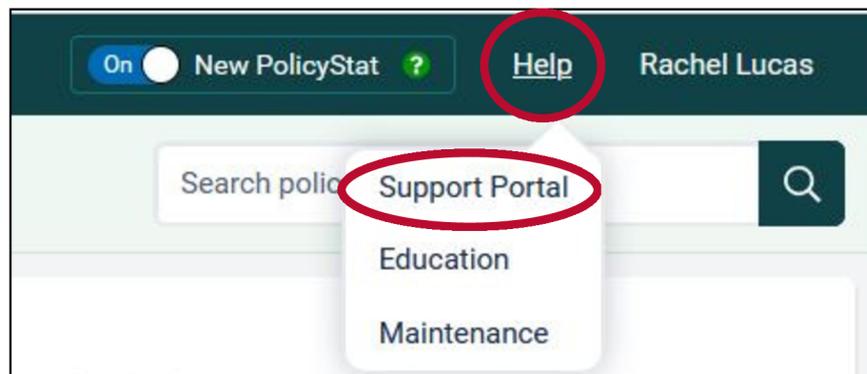
You will then be taken to the home page for the PolicyStat Support Portal. We encourage you to utilize this resource and reach out to our office if your questions are still unanswered.
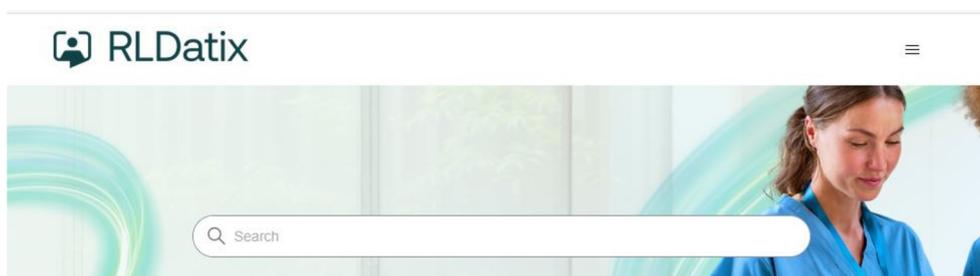
Site Selection

The Policy Office maintains three sites within PolicyStat:
- **UNM Policies**: For UNM Community and Guests
  - Contains both RPM and UAP Manuals
  - https://unmpolicy.policystat.com/
- **University Administrative (UAP)**: For Policy Owners, Editors, Designated Co-Editors, etc.
  - https://unmpolicy-uap.policystat.com/
- **Board of Regents (RPM)**: For the Office of the Board of Regents

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

Log in to PolicyStat online by using your UNM SSO login credentials.
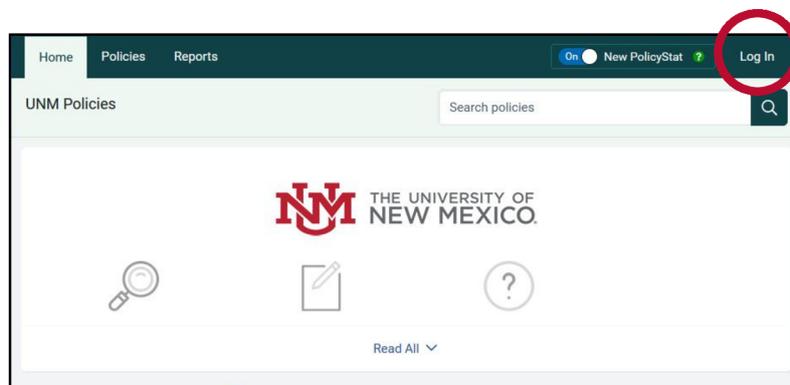
You will be prompted to select a home site. Chose **University Administrative (UAP)**. This site is the primary source for editing and managing all policies as a Policy Owner or Designated Co-Editor. If you select a different site by mistake, contact the Policy Office to have this fixed.
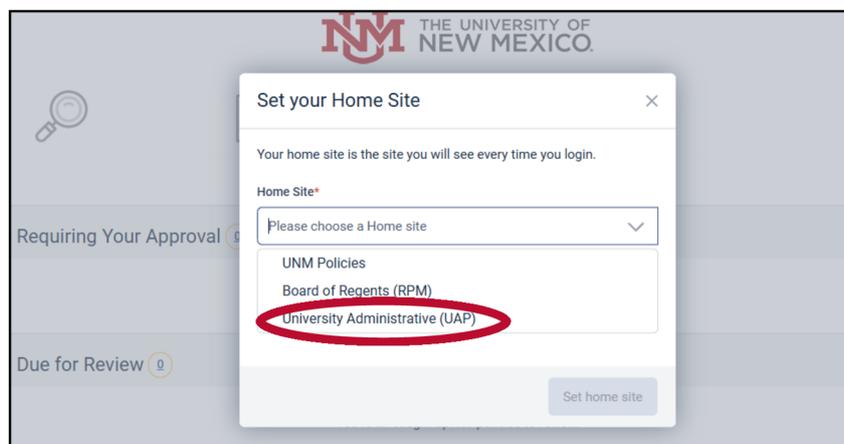
Please Note: Any UNM community member with an @unm or @salud account will also be able to log in. However, they will only have guest access to policies unless higher permission levels are granted by the Policy Office.

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 at this time.
4. **New & Recently Revised:** A color-coded breakdown of the number of policies newly created/revised in the last 30, 60, and 90 days.
- Please note that due to implementation, our policies will all appear as *new*.
   - Can I view a list of new and recently revised policies?

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
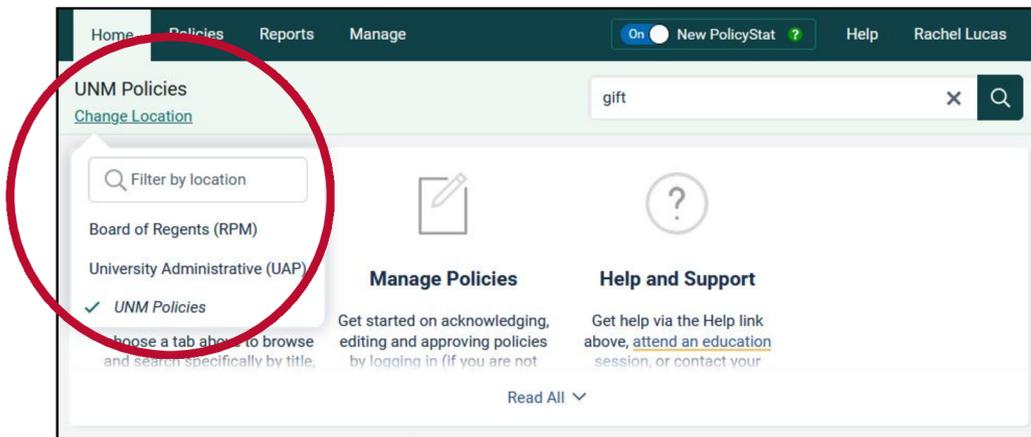
A user can search in a few different ways:

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

POLICY OFFICE
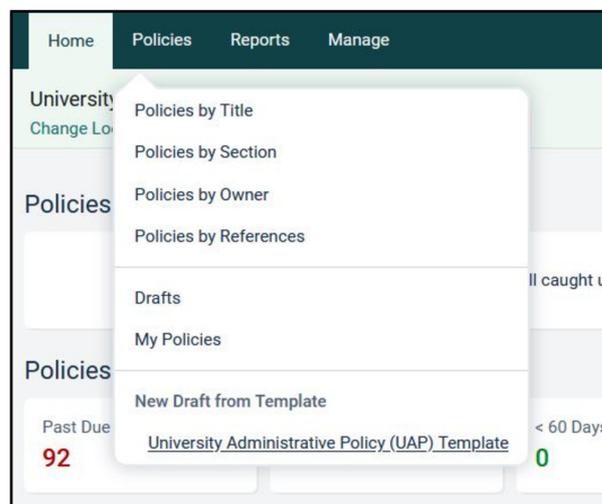
Permission Levels

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)

Designated Co-Editors (referred to as Area Editor in PolicyStat system) can:
- Create and edit policies within designated section (i.e. Section 2000)

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

Request Co-Editor Access

On the policy.unm.edu home page, navigate to Policy Owners and click the link to fill out the PolicyStat Co-Editor Request form. Once we receive your submission, we will update the designated co-editor with the Co-Editor access.

Alternatively, **use the link here** or scan the QR code below for the PolicyStat Co-Editor Request form.

POLICY OFFICE

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 Edito**r."

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*.
- Technically, editors and designated co-editors can open and edit any policy in that section. However, all requested 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 editors to edit only the policies for which their unit is responsible.

Policy Management

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.
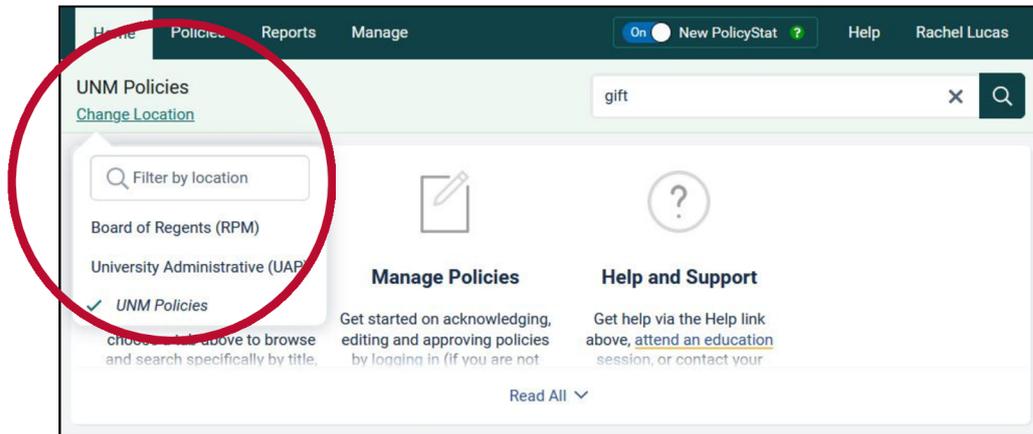
Open the policy you wish to edit and click **Edit** or **Review** in the top bar.
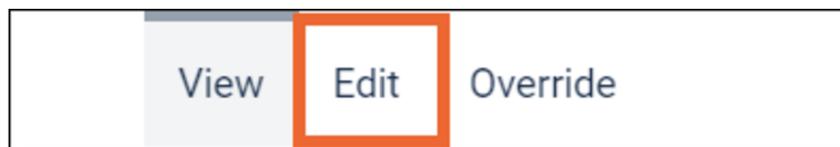
You will then be taken to the **Editor** for that policy. Please use the following pages as a guide for editing and also the PolicyStat **Support Portal** located under **Help** as a resource during the editing and approval process.

POLICY OFFICE
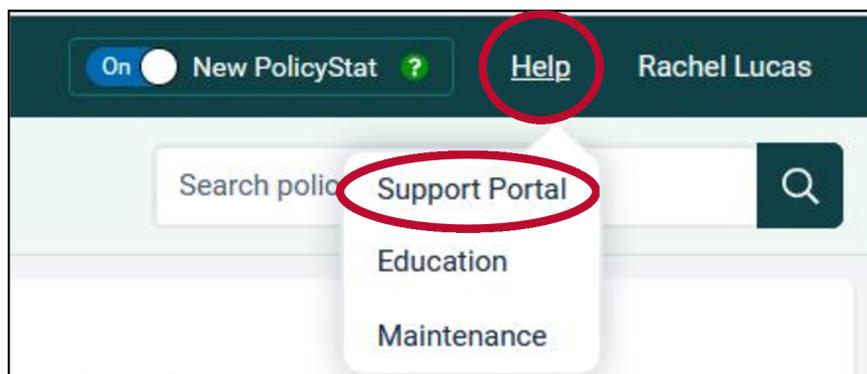
Policy Properties: [Properties and Content](#)

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:** If requesting change, consult with the Policy Office first.
- **Owner**: If requesting change, consult with the Policy Office first.
- **Section**: Do not edit.
- **Approval Workflow**: Do not edit.
- **Applicability**: Do not edit.
- **Next Review Date**: Do not edit.
- **References**: Do not add, unless previously discussed with Policy Office.

Editor: 101 Basics Handout

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

Sub-headings

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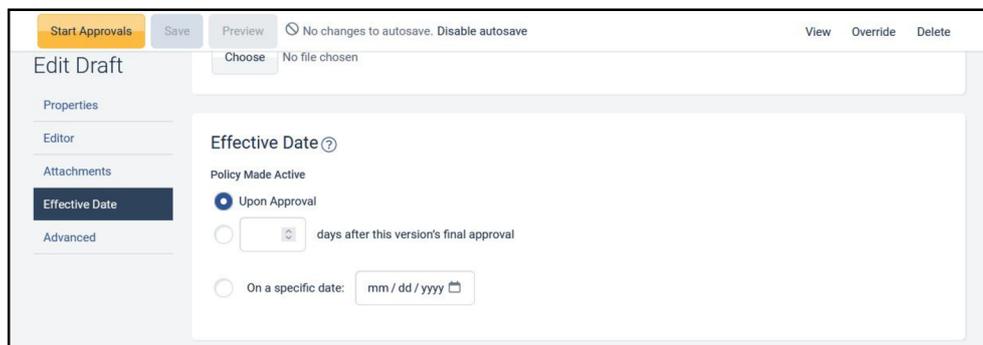
POLICY
OFFICE

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.
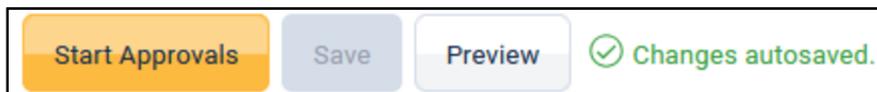
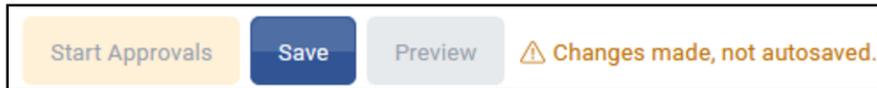POLICY OFFICE
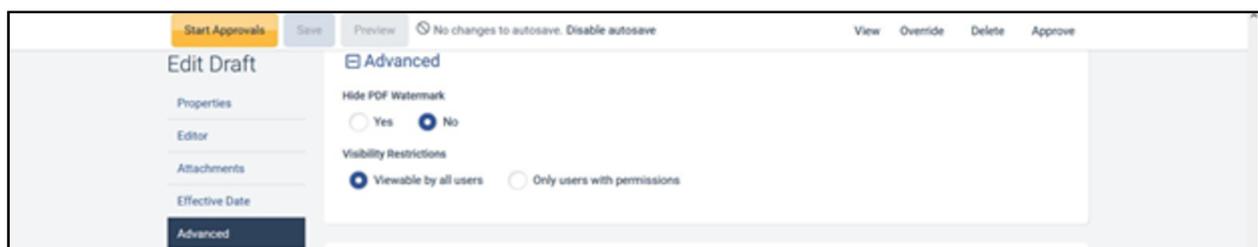
Drafts: Accessing Drafts

Should the power go out, computer lock up or you've simply finished working on a document for the day, the document is automatically stored in **Drafts** until it is routed for approval.
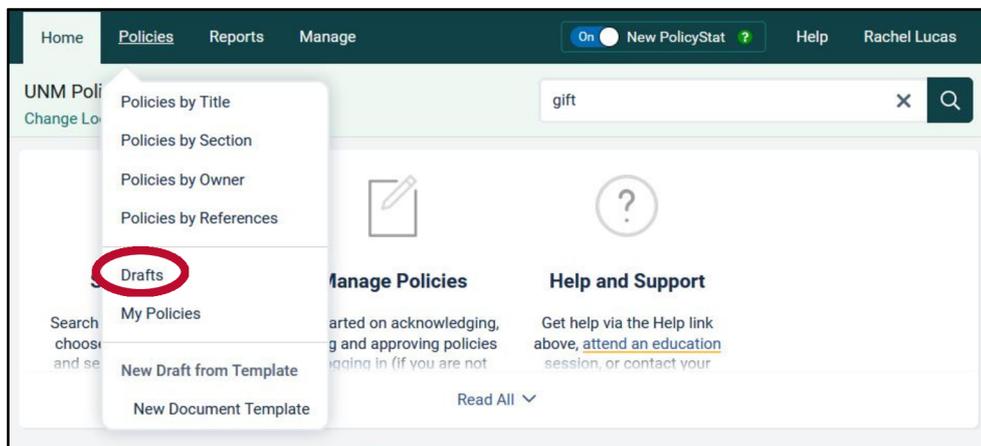
## Starting Approvals: How are Approval Workflows Started?

Please Note: Do not click "Start Approvals" until instructed to do so by the Policy Officer.

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

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.
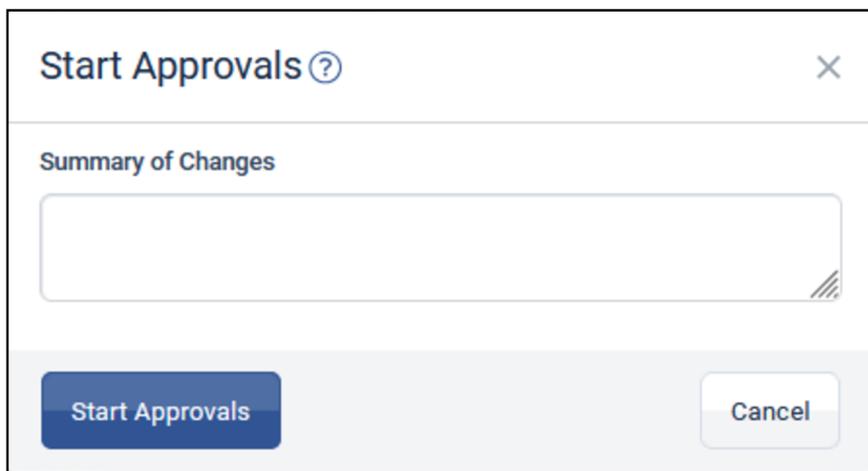
Confirm starting the process by clicking Start Approvals.
- When the final **Approver** provides their approval, the policy becomes active in PolicyStat.
  - The final Approver is the University President.

POLICY OFFICE

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).

POLICY OFFICE

PLACEHOLDER FOR PS APPROVAL WORKFLOW

POLICY
OFFICE

Policies Due For Review

Policies in this section are coming up for review based on review dates assigned to documents within the system. To access one policy at a time, select the title of the policy from the list.

- **Due for Review Report**

Select the circled number next to **Policies Due for Review** to access the full list of all policies.

Selecting the circled number next to **Policies Due for Review** will provide access to a report of policies that includes title, section, owner, and next review date (**All UAPs are set to a 3 year review cycle**).