

University of California, Merced

Title of Policy or Procedure

(Avoid using “UC Merced” or “Policy” in the title)

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| **Responsible Official:** | Title of Responsible Official (Vice Chancellor Level or Above).  If more than one Responsible Official, please list all. |
| **Responsible Office:** | Name of Department Responsible for Policy or Procedure.  If more than one Responsible Office, please list all. |
| **Issuance Date:** | **TBD** |
| **Effective Date:** | **TBD** |
| **Summary:** | One sentence summary of the Policy or Procedure. |
| **Scope:** | List of all campus constituencies this Policy/Procedure applies to (e.g., employees, faculty, students). |

|  |  |
| --- | --- |
| **Contact:** | Name, Title |
| **Email:** |  |
| **Phone:** | (209) 228- |

**I. REFERENCES AND RESOURCES**

References and Resources is a section reserved for Laws, Regulations, Policies, Guidelines, or Resources that directly affect or are directly affected by the Policy or Procedure. This section should answer the question: *Where do I find additional information about the sources of authority for this Policy/Procedure?* The References and Resources section is intended to be formatted as a list of hyperlinks broken into the groups listed below (as applicable).

Federal Laws and Regulations

* Insert link(s) if applicable

State Laws and Regulations

* Insert link(s) if applicable

UC Policies

* Insert link(s) if applicable

Guidelines/Resources

* Insert link(s) if applicable

**II. POLICY/PROCEDURE SUMMARY & SCOPE**

Please succinctly summarize the intended purpose of the Policy or Procedure (ideally three or fewer sentences). This section should answer the question: *Why do we have this Policy/Procedure?* Do not restate policy. Instead, reference existing policy briefly.

Please include the scope of the Policy or Procedure. Scope should answer the question: *Who is affected by this policy/procedure?* List any constituency within the campus community expected to abide by the Policy or Procedure.

**III. DEFINITIONS (if applicable)**

This section is used if you have more than one specialized terms that should be defined. Avoid defining common terms unless the common term has a specific and non-conventional use within the Policy/Procedure. Specialized terms which only appear once in the Policy/Procedure sections should be left out of the definitions section and defined where the term appears. Please use this format for definitions:

***Term***: Text briefly describing the definition.

***Term 2***: Text briefly describing the definition.

**IV. POLICY TEXT (if applicable)**

This section only applies if you are writing a Policy. This section describes the core purpose of the Policy. This section should answer the question: *What are the rules or principles on this subject?* Policy text should always be a high level overview. Refrain from including too much detail in this section. Detailed information will instead be included in the Procedures section. Please use this format if you have the need for a multi-level list within this section:

1. **IF YOU HAVE MULTIPLE SECTIONS, USE THIS FORMAT FOR EACH HEADER**

Text here, or use the following format for lists:

1. Use numbers for the first level after the header
   1. Use letters for the second level
      1. Use small numerals for the third level
         1. Use numbers for the fourth level

**V. PROCEDURES**

This section includes detailed information about the processes which are necessary for following the Policy. This section should answer the question: *How is the policy carried out?* Procedures should be described in logical order and in plain language. Complex procedures should be presented in outline format as outlined below. If there is a procedure for requesting exceptions to the Policy, include it here. Please use this format if you have the need for a multi-level list within this section:

1. **IF YOU HAVE MULTIPLE SECTIONS, USE THIS FORMAT FOR EACH HEADER**

Text here, or use the following format for lists:

1. Use numbers for the first level after the header
   1. Use letters for the second level
      1. Use small numerals for the third level
         1. Use numbers for the fourth level

**VI. RESPONSIBILITIES (if applicable or necessary)**

This section lists any specific responsibilities by the roles, units, offices, departments or titles. This section should answer the question: *Who are the responsible parties and what are they responsible for?* Do not include individual names in this section but instead include the individual’s position or title. Additional information such as how those responsibilities are carried out should be included in Procedures section if applicable.

**VII. POLICY OR PROCEDURE REVISION HISTORY**

This section lists the history of this policy/procedure, original date and revision dates, along with brief description of revisions.

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**APPENDICES**

**APPENDIX 1 - TITLE OF DOCUMENT**

If the Policy/Procedure has one or more attachments, include them in the Appendices section. If the Policy/Procedure has more than one Appendix, please insert a page break between each Appendix and number each (Appendix 1, Appendix 2, Appendix 3, etc).

The Appendix should contain any supplementary material that makes it easier to understand or comply with a Policy/Procedure. Forms referenced in the Policy/Procedure should be attached as Appendices if they are short. Longer forms should be listed in the References and Resources section with a hyperlink to the form.