



UNIVERSITIES OF WISCONSIN

UW System Administrative Policies: Glossary and Style Book

Formatting and writing guide for policies, procedures, and guidance

March 2026



GLOSSARY OF TERMS USED IN POLICY DEVELOPMENT

Policy Summary: A document that describes the purpose of the policy, the revisions, how institution comments were incorporated, and the impact of the policy.

Policy: A document that describes the rules, regulations, and expectations that stakeholders are expected to follow.

Procedure: A document that describes the necessary steps that need to be in place to be compliant with the policy.

Guidance: A document that provides additional information to help institutions comply with the policy. It does not contain any mandatory requirements except where requirements found in statute or administrative rule are referenced.

Interim Policy Action: A document drafted to address an emergency or urgent situation within a period too short to go through the full review process. These documents typically expire within the year.

UW System Policy Committees (UWSAPC): The policy review committee within UWSA which is composed of two subcommittees. Both subcommittees meet monthly to discuss policies, procedures, and guidance documents being drafted or revised.

Finance and General Administration Policy Committee (FGAPC): The FGAPC provides internal review of changes to financial and administrative policies. The committee is comprised of several members as described in [UW System Administrative Policy 3, Development, Revision, and Approval of Finance and General Administration Policies and Procedures.](#)

Academic and Student Affairs Policy Committee (ASAPC): The ASAPC provides internal review of changes to academic and student affairs policies. The committee is comprised of several members as described in [UW System Administrative Policy 2, Development, Revision, and Approval of Academic and Student Affairs Policies.](#)

Responsible UWSA Officer: The Responsible UWSA Officer varies depending on the policy but is typically a Vice President, Associate Vice President, or Director in the policy subject, or their designee. The Responsible UWSA Officer owns the content and direction of the policy.

Substantive Revisions: Amendments to policies, procedures, or guidance that change the meaning or intention of the document. Substantive revisions go to institutions for review.

Technical Revisions: Amendments to policies, procedures, or guidance that do not provide substantial change to the content or meaning of the document. Examples of technical amendments include, but are not limited to, updates to formatting, updates to contact information, changes in office names, cross-references to additional information, and rate changes. Technical revisions do not need to go to institutions for review.

Typographical Revisions: Amendments to policies, procedures, or guidance that correct typos in the document (spelling errors or capitalization errors) or fix broken hyperlinks. Typographical revisions do not require review or re-approval.

UW System Administrative Policy, Procedures, and Guidance (SYS): Policies, procedures, and guidance that affect the Universities of Wisconsin, except for the 1200 series. The 1200 series policies were a part of the former UPS Policy set and apply to all University of Wisconsin institutions except for UW-Madison.

UW System Administration Policies, Procedures, and Guidance (UWSA): Policies, procedures, and guidance that affect UW System Administration internally.

Anti-discrimination Framework: A framework for policy writers and reviewers to evaluate the impact of policies on stakeholder groups in compliance with federal and state anti-discrimination laws and adherence to the core values of the Universities of Wisconsin.

WRITING POLICIES, PROCEDURES & GUIDANCE

POLICY DEVELOPMENT

The Universities of Wisconsin Division of Finance and Administration manages the UW System Administrative (SYS) policy process. It provides policy owners assistance in developing draft documents, including policy summary documents and accurately tracking changes to the currently approved policy (for revisions). Once a draft is completed, UWSA collects policy feedback from internal policy committee members and leadership, distributes drafts for comment to institution stakeholders, and helps policy owners address comments. UWSA maintains up-to-date versions (including Word versions) of all SYS policies, procedures, and guidance documents.

PLEASE FOLLOW THE RULES BELOW WHEN DRAFTING OR REVISING A POLICY:

1. Use the standard templates developed and explained in [SYS 1, Development, Revision, and Approval of UW System Administrative Policies, Procedures, & Guidelines](#).
 - a. Do not delete template sections.
 - i. If they do not apply, state that in the policy.
2. Link all referenced websites.
3. Wisconsin state statutes should be referenced in the following format:
 - a. Wis. Stat. § XXX.X(X) or Wis. Admin. Code XX.X(X)
4. SYS policies should be referenced in the following format:
 - a. SYS XX, *Policy Title*.
5. SYS procedures should be referenced in the following format:
 - a. SYS XX, *Procedure Title*.
6. Regent Policy Documents should be referenced in the following format:
 - a. RPD XX-X, *Document Title*.
7. Gender pronouns should not be used.
8. Only use acronyms if they are spelled out earlier in the policy. Always indicate acronyms at the first occurrence of the phrase or sentence within the document.
9. Capitalize all official titles.
10. Only use position titles when delineating responsibility.
 - a. Avoid listing specific people by name.
11. Bold a word when placing emphasis.

BRANDING CONSIDERATIONS

1. In policies, procedures, and guidance, continue to default to our legal names of “University of Wisconsin System” and “UW System.” The legal name should always be used for:
 - a. Official titles (e.g., University of Wisconsin System President)
 - b. Topics where authority has been delegated from the Wisconsin Statutes, the Wisconsin Administrative Code, or the University of Wisconsin System Board of Regents.
2. The brand name “Universities of Wisconsin” may be used in limited circumstances when referring to the specific names of groups, communities of practice, etc.
3. The term “institutions” must be used when referring to the universities and UW System Administration.
4. The term “universities” may be used when referring to only the universities without including UW System Administration. (*This is most common in SYS 100 Series: Academic and Student Affairs policies.*)

When in doubt, using the legal name will always be correct.

PLAIN LANGUAGE

SYS policies, procedures, and guidance impact many stakeholders and should be specific and easy to understand. Please follow the guidance below:

- Define all uncommon terms in the “Definitions” section of the policy.
 - When defining a policy term, check similar policies to see if a definition exists elsewhere to try and ensure consistency where appropriate.
 - Only define a policy term if the term is used within the document.
- Use the “active voice” to clearly state the individual or department who needs to perform the action listed in the policy.
- Use bulleted lists or tables to display a series of requirements or examples.
- Simplify vocabulary and use concise language.
- Break up long sentences into short, easy-to-understand sentences.
- Attempt to write policies that are accessible to those with a 7th grade reading level.
 - Click [here](#) to learn how to check your readability and level statistics in Microsoft Word.
- Be precise when using directives. Use:
 - “must” for mandatory activities;
 - “UW Universities must develop procedures to support this policy.”
 - “may” for optional actions; or
 - “Exceptions may be granted by the UW System President under specific circumstances.”
 - “should” for recommendations.
 - “Employees should receive training on these provisions annually.”

For more information and guidance, please visit the resources below:

- [Plain Language.gov, Improving Communication from the Federal Government to the Public](#)
- [University of Wisconsin-Madison Writer’s Handbook](#)
- [Purdue Online Writing Lab](#)

DIGITAL ACCESSIBILITY COMPLIANCE

All SYS policies, procedures, and guidance must comply with the digital accessibility requirements outlined in [SYS 655, Accessibility of Web Content and Mobile Applications](#). The policies team is responsible for ensuring that content published to the [UW System Administrative Policies website](#) is compliant. Policy owners should follow the best practices for making their submitted documents accessible, as outlined in the [SYS 655 Guidance: Accessibility of Web Content and Mobile Applications Guidance, Section 5.C.I](#). These best practices include:

- a. Using plain language,
- b. Using appropriate font sizes and types,
- c. Adding alternative text (alt text) to images,
- d. Using heading structure to organize content,
- e. Ensuring sufficient color contrast,
- f. Using tables with proper column and row headers,
- g. Using informative/descriptive link text rather than “click here” or “more information,”
- h. Using built-in accessibility checkers, and
- i. Setting document language and using document properties to enter the title, subject, and author.

ANTI-DISCRIMINATION FRAMEWORK

Please consider the following to ensure compliance with federal and state anti-discrimination law and adherence to the core values of the Universities of Wisconsin:

- What individuals and groups are stakeholders of this policy? Do the benefits or impacts of this policy comply with [Regent Policy Document 14-6](#) and state and federal anti-discrimination law?
- Does this policy represent the core values of the Universities of Wisconsin?
- Does this policy create any barriers for stakeholders based on protected characteristics?

EFFECTIVE DATE PRACTICES

Most new or revised SYS policies become effective at the time of approval. However, some SYS policies require a greater investment of resources or training for UW institutions become compliant. For these policies, the policy owner may decide to publish a delayed effective date.

When there is a delayed effective date, the proposed effective date must fall on the first of a given month, be communicated at the time of the policy distribution, and be listed at the top of the policy. The Office of Administrative Policies will include a notice about an upcoming effective date a month in advance. Reminders can be distributed earlier as well, at the request of the policy owner.

The responsibility of monitoring policy implementation and providing any necessary training about a policy falls to the policy owner.

SYS POLICY, PROCEDURE, AND GUIDANCE TEMPLATES

Universities of Wisconsin Division of Finance and Administration maintains standardized templates for all SYS policies, procedures, and guidance to improve understanding across the system. These templates contain instructions under each heading to inform policy owners of what should be included. The most recent version of the templates can be found on the [Resources for Administrative Policy Owners and Responsible Officers](#) page. A brief summary of the definition of each document type (and when to use) is below:

POLICY

The UW System Administrative policy set falls into two general areas:

1. Academic and Student Affairs Policies
2. Finance and General Administration Policies

In both categories, policies are developed to establish standards to comply with applicable laws, regulations, and Regent Policy Documents. Policies apply universally to all UW institutions, except policies in the 1200 series which apply to all institutions except UW-Madison, and are designed to promote efficiency, reduce risk, and/or enhance operational objectives of the Universities of Wisconsin. SYS Policies are reviewed and approved by the System President.

PROCEDURE

Procedure documents list action steps required to implement and comply with SYS Policies. They may include specific instructions and forms to assist in complying with the policy they support. SYS Procedures are reviewed and approved by the responsible System Vice President.

GUIDANCE

Guidance documents support policies by providing best practices or advice on interpreting or complying with a policy. SYS Guidance documents are reviewed and approved by the responsible Associate Vice President or Director.

INTERIM POLICY ACTION

Interim policy/procedure actions may be necessary to address an emergency or urgent situation by:

- Drafting a new policy/procedure action, where an interim policy/procedure action addresses a high-level concern that requires clarification sooner than would be allowed by the full SYS policy review process, with the intention that a normal SYS policy or procedure will be drafted and reviewed to replace the interim policy action; or
- Amending/waiving provisions of an existing policy or procedure, if the action is to be necessary for only a temporary time (e.g., one-time extension of the due date of a required report).

All interim policy/procedure actions will include an expiration date, which will be no longer than one year after the policy or procedure is approved.