Web-Based Policy System

Overview and Basic Tips

Overview of Policy

- Log in to your web-based policy manual using the link, and username and password, provided to you (BoardDocs users—log in as usual to BoardDocs). It is helpful to bookmark this link in your web browser for easy access. The web-based policy manual can be accessed from any computer via the web

- For best results, we recommend working in Mozilla Firefox or Google Chrome web browsers

Overview of main page:

Link to home website, log out and Search areas—Options and Public View listed in dropdown

Policies tab drops down to access adopted, draft retired and CPNN areas

Policies can be featured for easy access by parents/guardians and community

School entity logo, description and contact information can be added by setting up fields in the Options area under login

Policies Tab:

Active – currently adopted policies

Draft – draft policies, not yet adopted

Retired – formerly adopted policies that were revised or rescinded

CPNN – provides access to the CPNN newsletter and policy updates

- Under each area of Policies (**Active, Draft, Retired**), the policies will be listed by section—clicking on the section reveals the list of individual policies

This area will serve as your new Table of Contents

- Clicking on a section expands the section to see the list of policies. Click on a policy to open it in the viewing pane at the right

Anatomy of a Policy

Book and **Section** – location of policy

Title – title of policy

Number – policy number

Status – indicates what type of draft (1st reading, 2nd reading, etc.), Active or Retired

Book	Policy Manual
Section	100 Programs
Title	Adoption of Textbooks
Number	108
Status	Active
Adopted	January 15, 2001
Last Revised	September 16, 2013

Policy Headings-

Purpose, Authority, Definitions, etc., are bolded and underlined in body of policy; subheadings will be underlined or italicized

Authority

The Board is responsible for adopting all textbooks used for instruct and replacement.[1][2][3]

Definition

Textbooks shall be defined as the books used as the basic source of information in the planned instruction.

Delegation of Responsibility

The Superintendent shall be responsible for the selection and recommendation of textbooks for Board consideration. No adoption or change of textbooks shall be made without the Superintendent's recommendation, except by a two-thirds vote of the Board.[1][3]

Footnotes –

Footnote numbers at the end of a paragraph link to legal citations that apply to the language in that paragraph. **Hovering** over the footnote will yield a description of the legal citation; **clicking** on the footnote will open a new Internet browser window or tab with the applicable statute or regulation. Footnote numbers correspond with the numbers in the Legal references at the end of the policy, which also link

Attachments

- Policy attachments or forms can be added to a policy and will show up at the bottom of the policy as an attached file—these can be documents in Microsoft Word, PDF files, etc. Double click on the attachment to open it.

Curriculum Review By Parents/guardians And Students

105.2 Exemption From Instruction

106 Guides For Planned Instruction

107 Adoption Of Planned Instruction

school year.

4. Expenditures on language instruction education programs.
5. Other expenditures from supplemental state or local funds consistent with the Title I.

Complaints by individuals and organizations regarding implementation of equivalence between schools shall be processed in accordance with Board policy.[14]

103-Attach.doc (24 KB)

Last Modified by Data Conversion Process on July 31, 2014

Editing Policy

- Clicking on the policy allows you to view it in the viewing pane. In order to edit the policy, click on the pencil icon in the top, left—use the **Workflow** handouts to guide you in editing policy
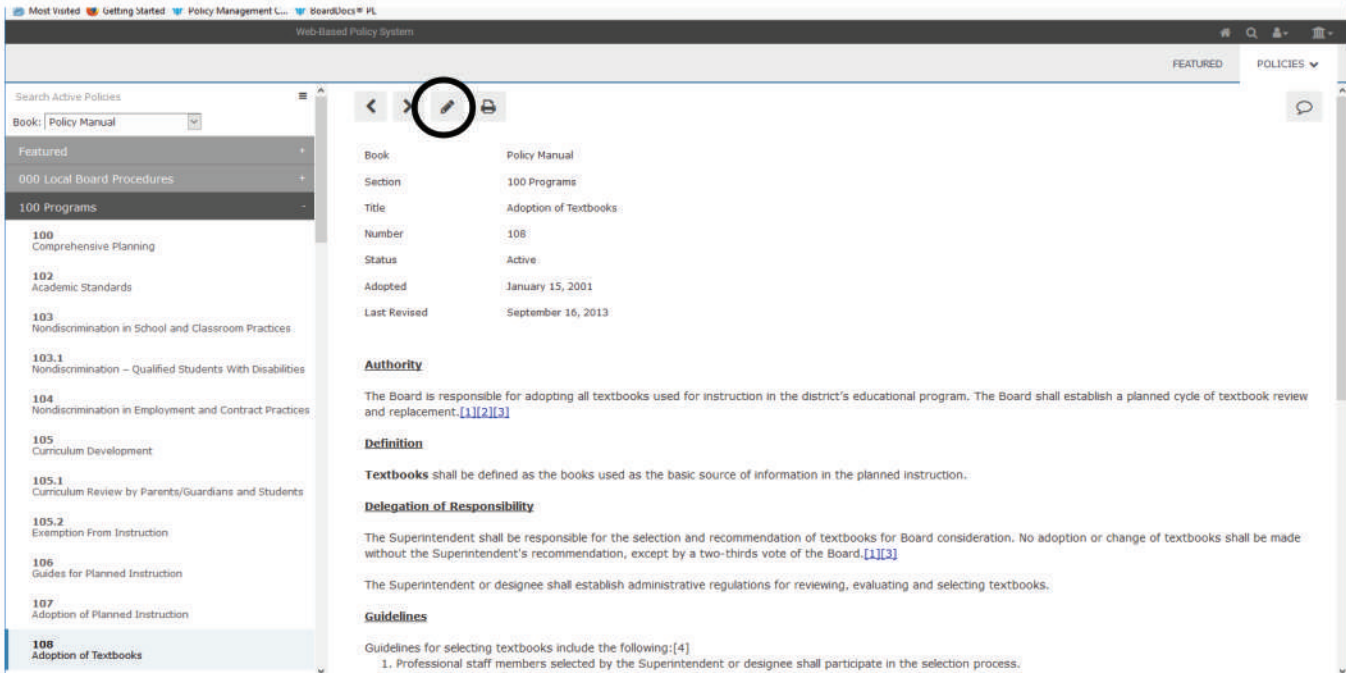
- **Editing Attachments** – To add an attachment, click and drag from a folder or click in the white space of the "Public Files" box to bring up the file selector to choose a file. To delete an attachment, right click on it and select Delete. Attachments can be clicked and dragged to reorder
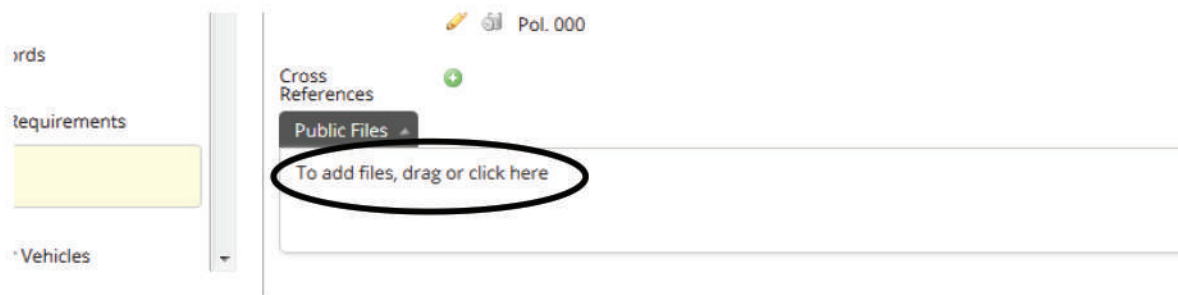
- **Close and Save** – If you have used the Edit icon to edit a policy, the **Close** icon will close without saving changes; the **Save** icon will save changes
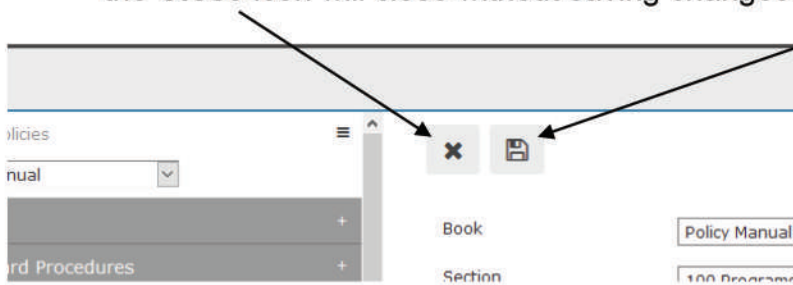
Text Editor

Key items in the Text editor (many of these are very similar to Microsoft Word):

Spell Check options and disabling Spell Check As You Type (SCAYT)

Undo/Redo

Find and Find/Replace

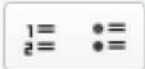Bold/Italics/Underline/Strikethrough (**Note:** basic keyboard commands such as Ctrl+B/Command+B or Ctrl+U/Command+U also work in this system)

Increase/Decrease Indent

Numbered List/Bulleted List

Font Type and Size (policies have been set to default as **Verdana 14**)

Text Color and Background Color (works like a highlighter)

Justification/Centering

Maximize (enlarges body of policy and text editor on screen)

Show Blocks (allows you to see hard and soft returns)

Paste Options and Remove Formatting (**Note:** basic keyboard commands such as Ctrl+X/Command+X for cutting, Ctrl+C/Command+C for copying and Ctrl+V/Command+V for pasting also work well in this system—for some options, the icon will prompt you to use the keyboard shortcuts). Try different paste options depending on source of copied material Using **Paste as Plain Text** is the best option to avoid formatting issues

Tracking Changes (see Options information below for how to turn on in editor) – Start/Stop tracking, Show/Hide tracking, Accept All/Reject All, and Accept and Reject

Footnotes and Shared Notes – Please work with Policy Services staff in adding Footnotes/Legal References to ensure they link. Shared Notes can be added in Draft policies only as a note to other staff or Policy Services staff (creates note at beginning of paragraph where cursor is currently located)
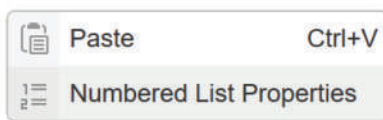
Listings

It is easiest to create numbered lists by highlighting all of the items you would like numbered and then using the numbering icon:

To create a **tiered** or nesting list—use the numbering icon to create a complete numbered list of <u>all items first</u>, then highlight the items that should be moved in a level, use the **increase indent** icon, and then **right click** to select **Numbered List Properties**

ne owner or nanuier or a service animal shall be solely responsible for.

1. Supervision and care of the animal, including any feeding, exercising

2. Control of the animal at all [Paste   Ctrl+V] a harness, least
   means.

   [Numbered List Properties]

3. Damages to district buildings, propert [Numbered List Properties] d by the a

Select the level you would like (the normal pattern in the policy guides is a, b, c for a second tier list)
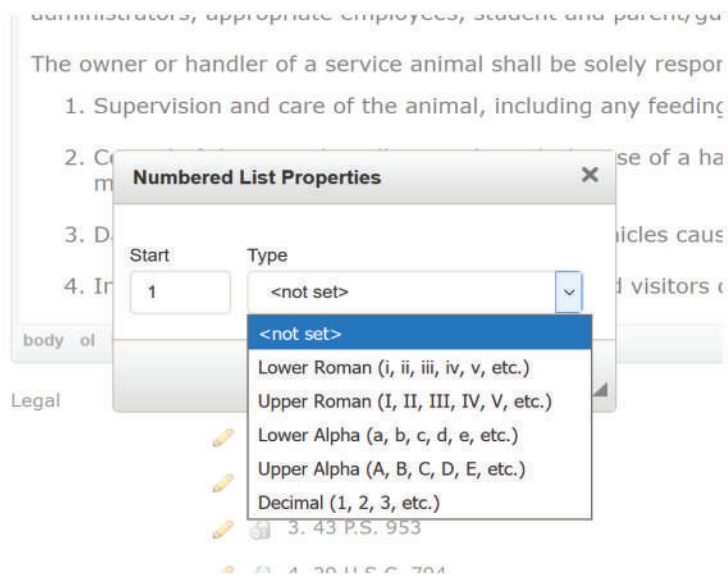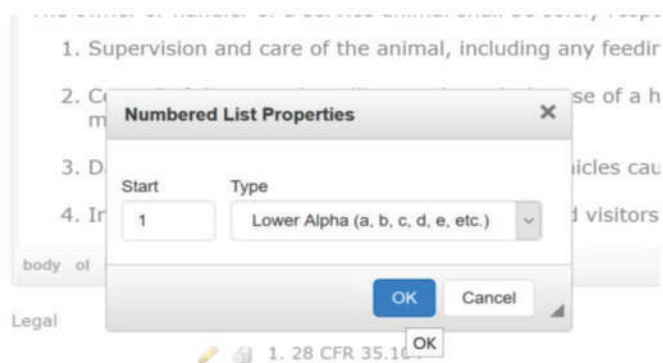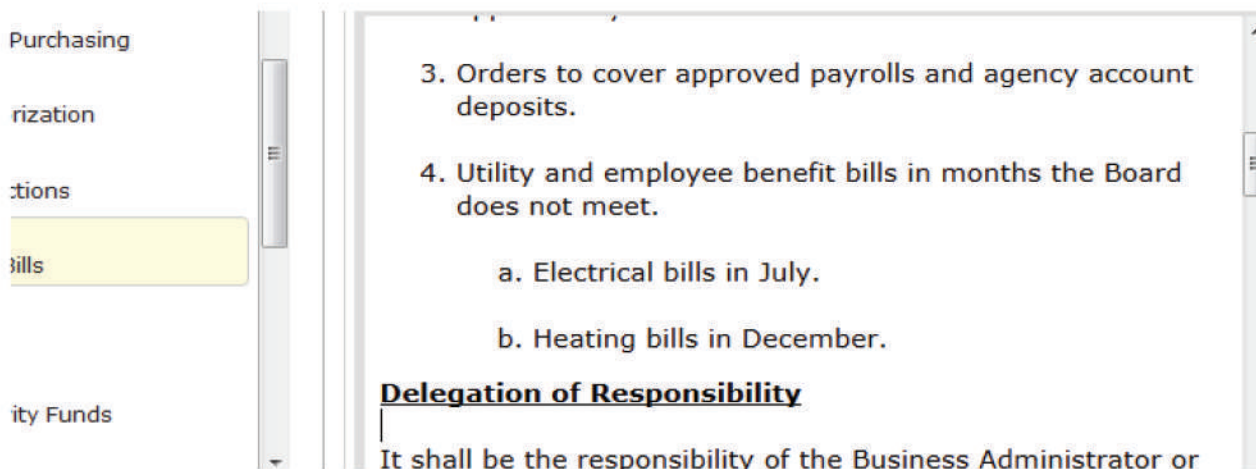
The owner or handler of a service animal shall be solely respon

1. Supervision and care of the animal, including any feeding

2. C ___ se of a ha
   m

Numbered List Properties ✕

3. D. icles caus

Start   Type

4. Ir   1   <not set>   ∨   visitors

body ol

| <not set> |
| Lower Roman (i, ii, iii, iv, v, etc.) |
| Upper Roman (I, II, III, IV, V, etc.) |
| Lower Alpha (a, b, c, d, e, etc.) |
| Upper Alpha (A, B, C, D, E, etc.) |
| Decimal (1, 2, 3, etc.) |

Legal

3. 43 P.S. 953

Then, select **OK**

1. Supervision and care of the animal, including any feedir

2. C ___ se of a h
   m

Numbered List Properties ✕

3. D. icles cau

Start   Type

4. Ir   1   Lower Alpha (a, b, c, d, e, etc.)   ∨   visitors

body ol

OK   Cancel

Legal

OK

1. 28 CFR 35.1

Use **Shift + Enter** to make "soft returns" in between items in a listing if you would like spaces between

Purchasing

rization

:tions

3ills

ity Funds

3. Orders to cover approved payrolls and agency account deposits.

4. Utility and employee benefit bills in months the Board does not meet.

    a. Electrical bills in July.

    b. Heating bills in December.

Delegation of Responsibility

It shall be the responsibility of the Business Administrator or

This same logic will work for creating **bulleted** lists

Overview of Options—located under login area
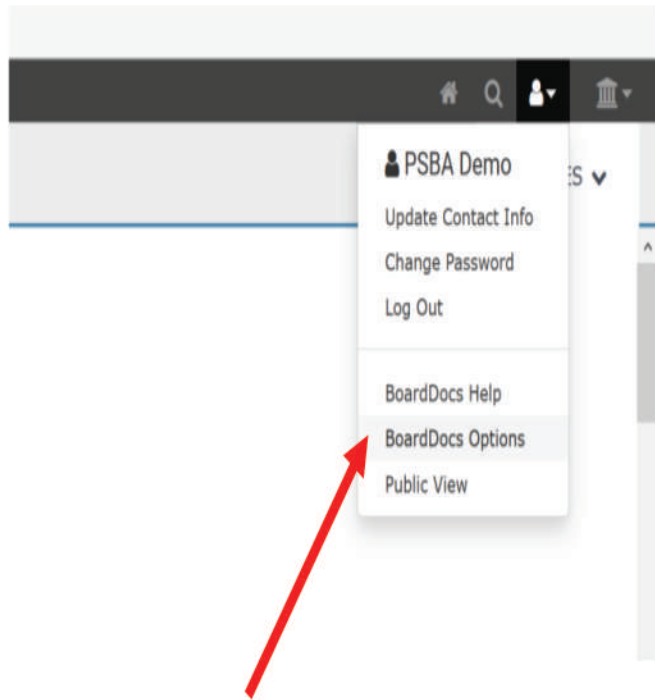
The BoardDocs Options area will allow you to set up the following major areas:

- Customized welcome language

- Logos/Graphics—including graphic to print at top of policies

- Enabling Tracking Changes

- Setting up Legal References at end of policies

- Setting up Status options in policies

Site Options

Global Settings   ✕ Close

● Site   🗊 Policies

Welcome Page

Title   Policy Manual

Description   School Board Policy Manual

Body   THE NEW WEB-BASED SYSTEM FEATURES:

                 EXPANDED SEARCH CAPABILITIES
                 STREAMLINED COLLABORATION WITH PSBA
                 INNOVATIVE ACCESS TO WEB-BASED LEGAL LINKS
                 CUSTOMIZABLE BOARD POLICY APPROVAL PROCESS

> Adds information to the body of the Welcome/Featured tab – these may be edited at your discretion

Header

Site Title (Line 1)   1234 Policy Street, Harrisburg

Site Title (Line 2)   Web-based policy system

> Adds information to the top, header line of the web manual

Home URL   www.policy.com
ⓘ example:
   http://www.domain.com

> This creates the link to your school entity's website on the Home icon of the header bar

Contact Information

Contact Name   Policy Programs

Contact Email   policyprograms@policy.org

> Customize and designate contact information here if you would like to designate a staff contact

Site Images

Upload images   **Site Logo**
                      Appears at the top-left of the screen. Ideal image size is 70px wide and 50px high. GIF and JPEG work. A transparent PNG looks best. (Click or drag to a...

                      sitelogo.png

                      Print, Login & Scoreboard Logo
                      Appears on printed pages, login page, and on Scoreboard b... image size is 200px wide and 100px high. (Click or drag to a...

                      scoreboardlogo.png   (7...

                      Welcome Image
                      Appears on the Welcome screen to the right of the text. Idea... 250px wide, and no more than 300px high. (Click or drag to...

                      📄 welcome.png   (15 KB)

> This area controls images/logos you would like to add for customization
>
> The "Print" logo allows you to place a graphic file of the school logo or name to print at the top of policies

Password Rules

Minimum password   7   characters
length

Require   ☐ Uppercase and Lowercase   ☑ N

Track Changes

Track Changes   ☑ Enable

> Turns on tracking changes in editor
>
> Turns on META search for sample search
>
> Determines Share options

META Search

META Search   ☑ Enable

Social Sharing

Enable buttons to   ☐ 🐦 Twitter   ☐ f Facebook   ☐ ✉ Email   ☑ 🔗 URL
facilitate sharing of public
documents

Click Save at the top when any options settings are changed and refresh browser

Policy Options (current BoardDocs users – set Select Policy System to BoardDocs)

Global Settings   ✕ Close

Site | **Policies**

Policy Publishers

👤 Andrew Christ 👤 Christina Griffiths 👤 Nathan Mains 👤 Teressa DeRoos 👤 Heather Masshardt
👤 Kim Frischkorn 👤 Peg Nailor 👤 Beth Mumper 👤 Kristin Ehrhart 👤 Tammy Medellin 👤 Ashley White
👤 Davelyn Smeltzer 👤 Adele Mixell 👤 Mary Hamilton

> Persons editing policies should be listed here

Setup

Select Policy System   [BoardDocs ▾]

Default Policy Book   [Policy Manual ▾]
ⓘ This is the book people see first when they click on the Policy tab.

> Sets your default policy book – the book that is first seen when clicking on Policies tab

Visibility

Show Policies   [Everyone ▾]

Show Policies Under Consideration   [Only Private ▾]

Show Legal and Cross-Ref Links: [After Document Content ▾]

> **Show Policies** determines whether **Active** policies can be seen by Everyone (public) or only those who have logged in. **Show Policies Under Consideration** determines whether **Draft** section policies can be seen by Everyone (public) or those logged in **Moves Legal References to _end_ of policies**

Statuses

Policy Status List
ⓘ "Active" and "Retired" will be included automatically

Administrative Review
Policy Committee Review
Solicitor Review
First Reading
Second Reading
Administrative Regulation

> This **Status** list should be customized by your school entity and used to develop or formalize a process for policy review and adoption—**Active** and **Retired** are default status options built in, the list here should be customized to capture your review and reading process for **Draft** policies (these are examples)

ommittees?open&login#tab-policy

Additional Fields

ⓘ These fields are visible to publishers only

Additional Policy Fields   ☐ Enabled

Primary   [   ]

Secondary   [   ]

> **Additional Fields –** described below
>
> **Workflow History –** for BoardDocs users, determines who sees "modified by" data

Policy Workflow History

Show to Public   ☐ Yes
Show to Admin   ☐ Yes
Show to Executive   ☐ Yes
Show when Printing   ☐ Yes

Click Save at the top when any options settings are changed and refresh browser

Additional Fields –

When the Additional Policy Fields checkbox is selected to be Enabled, additional fields and menus display on policy items that are only visible to document publishers who are logged in—a description of these is below if you find these helpful to your policy process

Be sure to <u>Save</u> using the diskette icon after changing Options and refresh the web browser.

Description of Additional Fields (for internal use at local discretion):

Origin – the person who worked on the policy
Office – the office in which that person is employed
Next Review – date field to indicate next review of the policy
Expire – date field to indicate expiration of the policy, if applicable
Legal – date field to indicate last legal review (by internal school solicitor)
Editor – date field to indicate last editor review (by internal staff)
Deputy Supt/Supt – date field to indicate last review by Superintendent or designee
Editor – date field to indicate second editor review (by internal staff)
Clerk – date field to indicate last review by administrative assistant/staff
Upload – date field to indicate date of last upload/when policy was made Active

Primary and Secondary Fields – may be used to store terms or names that assist your school entity in tracking policies; for example, the names of individuals or departments with primary or secondary responsibility for creation and/or maintenance of a policy

Featuring Policies

Policies under **Active** or **Draft** can be featured to bring them to the top of the list and place a shortcut on the main Welcome/Featured page—this can be useful if you'd like members of the school community to see a newly adopted/revised policy that is Active, or if you want staff members who have the login to review a specific policy in Draft (**please note, only users with the login will be able to see featured Draft policies**)

- To **Feature** a policy, go to the appropriate area in the Policies tab (Active or Draft) and click on the policy you would like to feature

- Right click on that policy and select **Feature**
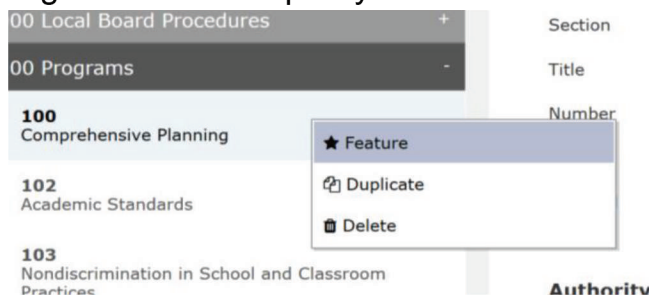
- This will bring it to the top of the list with a gold star, and add it to the Welcome/Featured tab—to remove, right click and select **Remove from featured**

Search

There is a search function built into each area of the Policies tab that will allow you to search all policies in that area of your policy manual (**Active**, **Draft** or **Retired**)
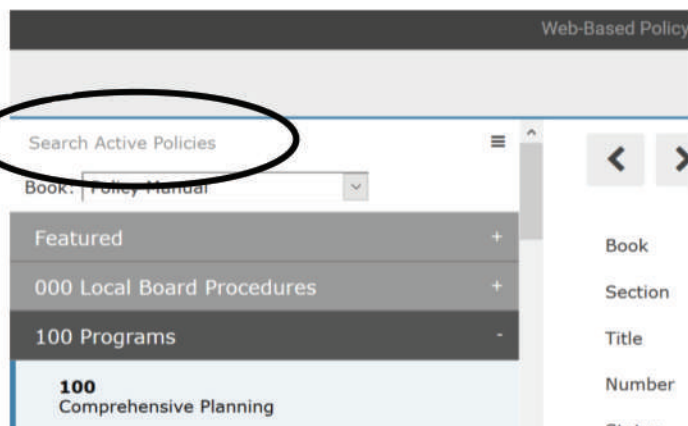
The **Search** icon at the top, right (magnifying glass) also allows you to search your own policies and attachments, or click and use the **META** search, which allows you to search **Active** policies and agenda items of all other system users in Pennsylvania and across the country—add your search term, and add **policy pa** after the term to narrow your search results
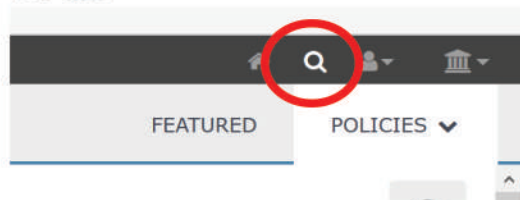
After clicking the icon, a new screen will appear, and search results will appear as individual tiles—clicking on a tile will open it in a separate window to read the text. Language can be copied/pasted into your own draft policy for printing.
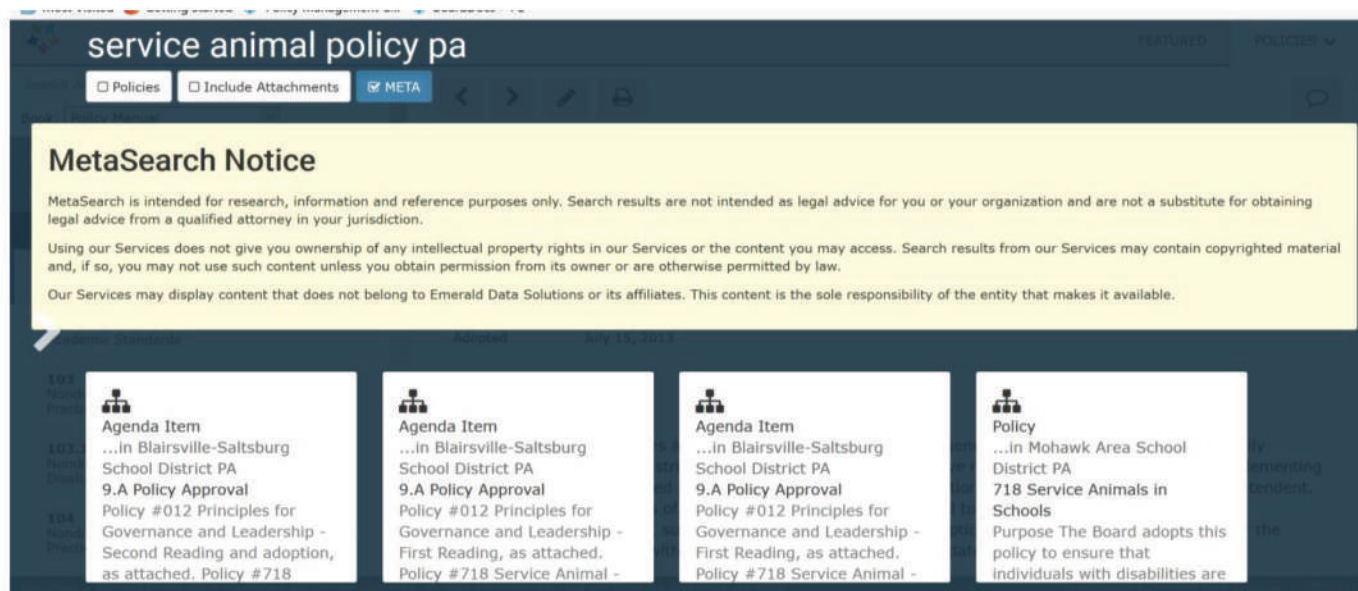
Clicking on an individual search result:

To remove the Search screen, click the X to remove it from the screen