

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:

The screenshot shows the main page of the BoardDocs web-based policy system. The browser address bar shows the URL: <https://www.boarddocs.com/pa/psba/reskin/Board.nsf/Private?open&login#>. The page header includes a navigation bar with 'FEATURED' and 'POLICIES' tabs. The main content area features the Bent Creek Educational Services logo, the title 'RESKIN - Policy Services', and a list of features. A 'Policies' section is visible, showing a policy titled '916: Volunteers'. Callout boxes provide additional information:

- Link to home website, log out and Search areas—Options and Public View listed in dropdown**: Points to the navigation bar in the top right corner.
- Policies tab drops down to access adopted, draft retired and CPNN areas**: Points to the 'POLICIES' dropdown menu.
- Policies can be featured for easy access by parents/guardians and community**: Points to the '916: Volunteers' policy card.
- School entity logo, description and contact information can be added by setting up fields in the Options area under login**: Points to the school logo and name.

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- Retired** – formerly adopted policies that were revised or rescinded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

The screenshot shows a browser window with the URL <https://www.boarddocs.com/pa/psba/reskin/Board.nsf/Private?open&login#>. The page title is "Web-Based Policy System". On the left, there is a sidebar with a search bar and a list of sections under "000 Local Board Procedures". The main content area displays a policy document for "Policy Manual" with fields for Book, Section, Title, Number, Status, and Adopted date. Below the document details is an "Authority" section and a "Contents" section listing various documents.

- 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

The screenshot shows the same browser window as above, but with the sidebar expanded to show a list of sections. The sections listed are: 000 Local Board Procedures, 100 Programs, 200 Pupils, 300 Employees, 600 Finances, 700 Property, 800 Operations, and 900 Community. A red arrow points to the "600 Finances" section, which is highlighted. A text box with a red border is overlaid on the main content area, stating "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

The screenshot displays a web-based policy system interface. On the left, a sidebar lists active policies, including 'Policy Manual', 'Local Board Procedures', and 'Programs'. The main content area shows a policy document with the following details:

- Book and Section** – location of policy: Policy Manual / 100 Programs
- Title** – title of policy: Adoption of Textbooks
- Number** – policy number: 108
- Status** – indicates what type of draft (1st reading, 2nd reading, etc.), Active or Retired: Active
- Adopted**: January 15, 2001
- Last Revised**: September 16, 2013

The body of the policy includes sections for **Authority**, **Definition**, and **Delegation of Responsibility**. The **Authority** section states: 'The Board is responsible for adopting all textbooks used for instruction and replacement. [1][2][3]'. The **Definition** section states: 'Textbooks shall be defined as the books used as the basic source of information in the planned instruction.' The **Delegation of Responsibility** section states: '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]'. Footnote numbers [1], [2], and [3] are present at the end of the Authority and Delegation of Responsibility paragraphs, respectively.

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

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.

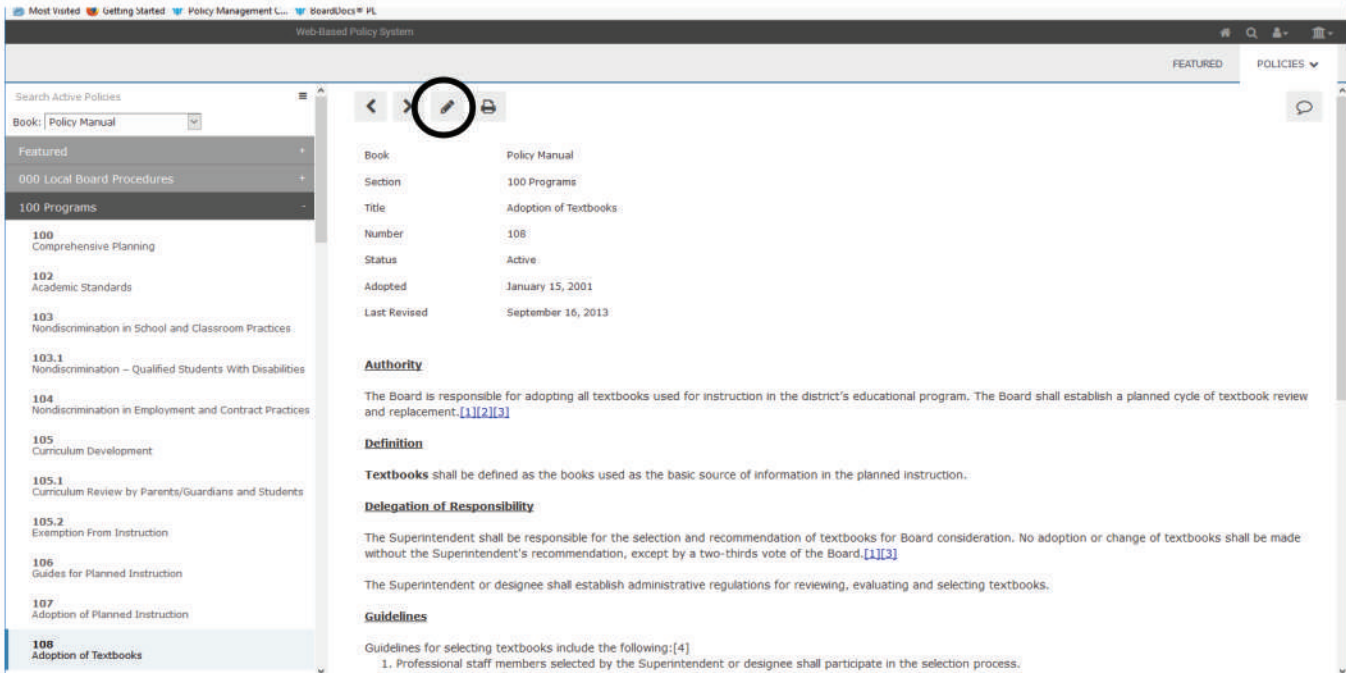
Complaints by individuals and organizations regarding implementation of equivalence between schools shall be processed in accordance with Board policy.[14]

 **103-Attach.doc (24 KB)**

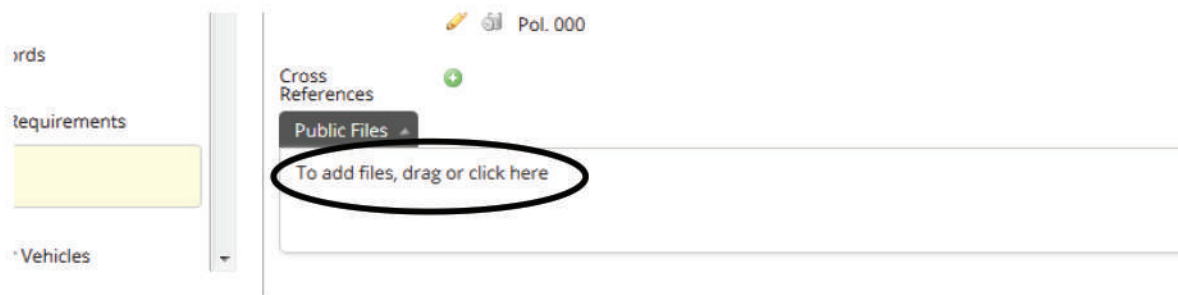
Last Modified by Data Conversion Process on July 31, 2014

Editing Policy

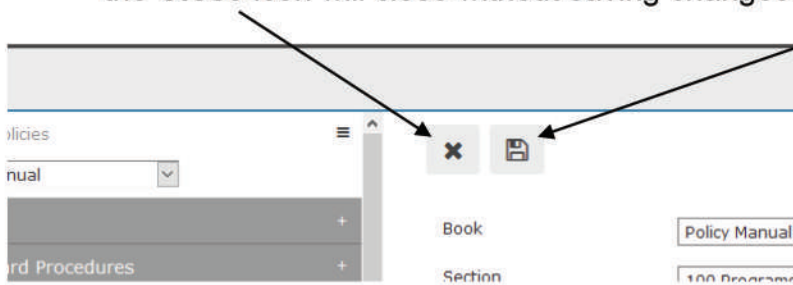
- Clicking on the policy allows you to view it in the viewing pane. In order to edit the policy, click on the pencil icon in the top, left—use the **Workflow** handouts to guide you in editing policy



- 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



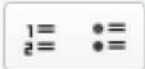
Bold/Italics/Underline/Strikethrough (**Note:** basic keyboard commands such as Ctrl+B/Command+B or Ctrl+U/Command+U also work in this system)



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

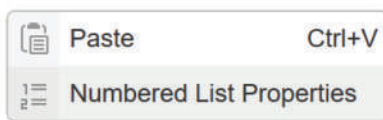
It is easiest to create numbered lists by highlighting all of the items you would like numbered and then using the numbering icon:



To create a **tiered** or nesting list—use the numbering icon to create a complete numbered list of all items first, 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**

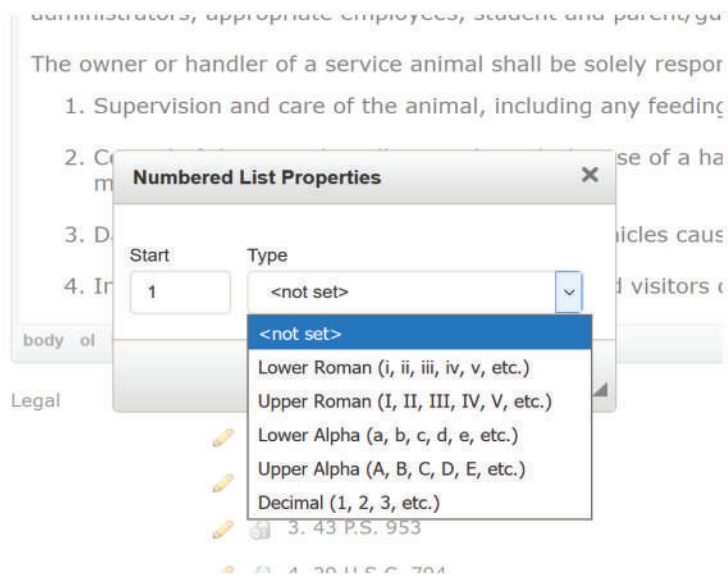
The owner or handler of a service animal shall be solely responsible for:

1. Supervision and care of the animal, including any feeding, exercising
2. Control of the animal at all means.
3. Damages to district buildings, property, or persons caused by the a

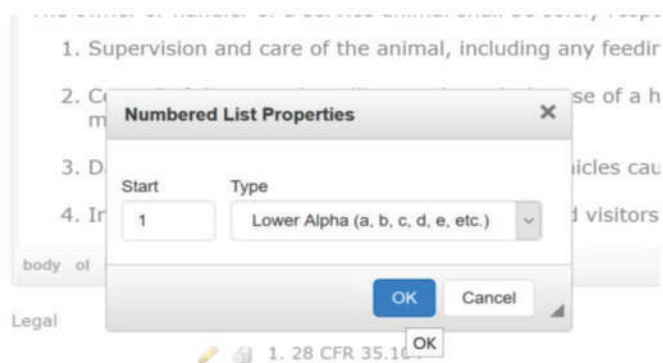


Numbered List Properties

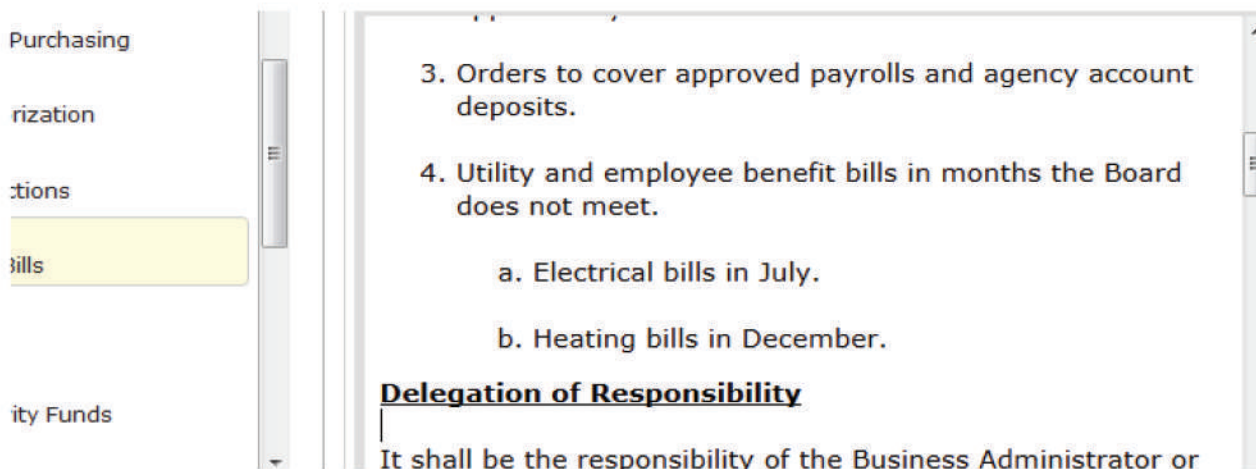
Select the level you would like (the normal pattern in the policy guides is a, b, c for a second tier list)



Then, select **OK**

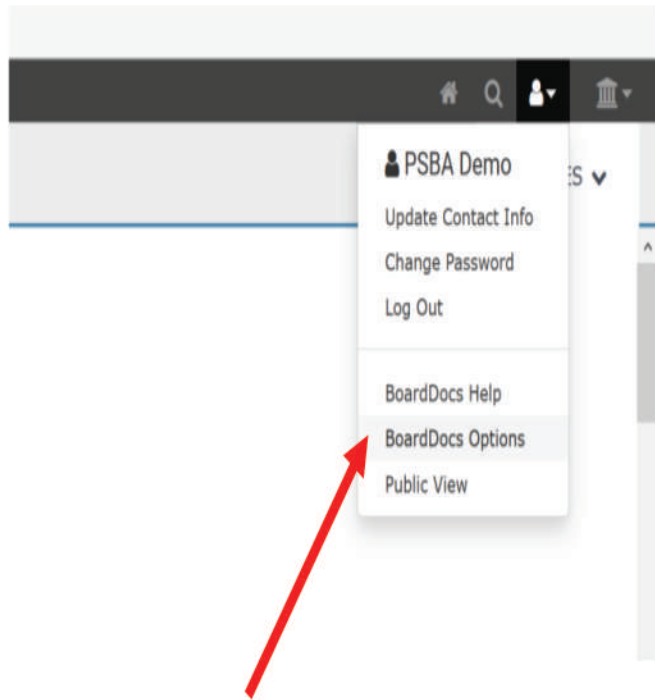


Use **Shift + Enter** to make “soft returns” in between items in a listing if you would like spaces between



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

dtSearch Support Free Hotmail Suggested Sites Web Slice Gallery

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

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

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 add)

sitelogo.png

This area controls images/logos you would like to add for customization

Print, Login & Scoreboard Logo

Appears on printed pages, login page, and on Scoreboard browser. Ideal image size is 200px wide and 100px high. (Click or drag to add)

scoreboardlogo.png (7 KB)

The "Print" logo allows you to place a graphic file of the school logo or name to print at the top of policies

Welcome Image

Appears on the Welcome screen to the right of the text. Ideal image size is 250px wide, and no more than 300px high. (Click or drag to add)

welcome.png (15 KB)

Password Rules

Minimum password length: 7 characters

Require: Uppercase and Lowercase Notify on changes

Turns on tracking changes in editor

Track Changes

Track Changes: Enable

Turns on META search for sample search

META Search

META Search: Enable

Determines Share options

Social Sharing

Enable buttons to facilitate sharing of public documents: Twitter Facebook Email URL

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, Teresa 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

Moves Legal References to end of policies

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

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)

Additional Fields

These fields are visible to publishers only

Additional Policy Fields: Enabled

Primary: [Text Field]

Secondary: [Text Field]

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 Save 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

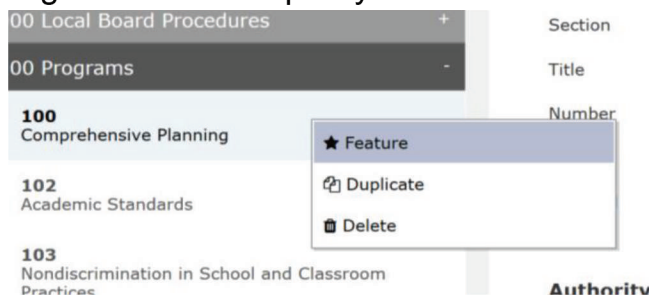
Upload – date field to indicate date of last upload/when policy was made Active

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**)

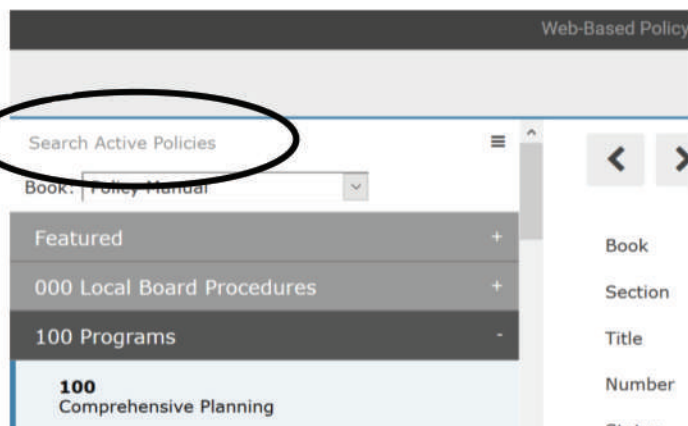
- To **Feature** a policy, go to the appropriate area in the Policies tab (Active or Draft) and click on the policy you would like to feature
- Right click on that policy and select **Feature**



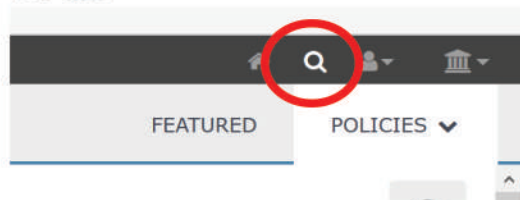
- This will bring it to the top of the list with a gold star, and add it to the Welcome/Featured tab—to remove, right click and select **Remove from featured**

Search

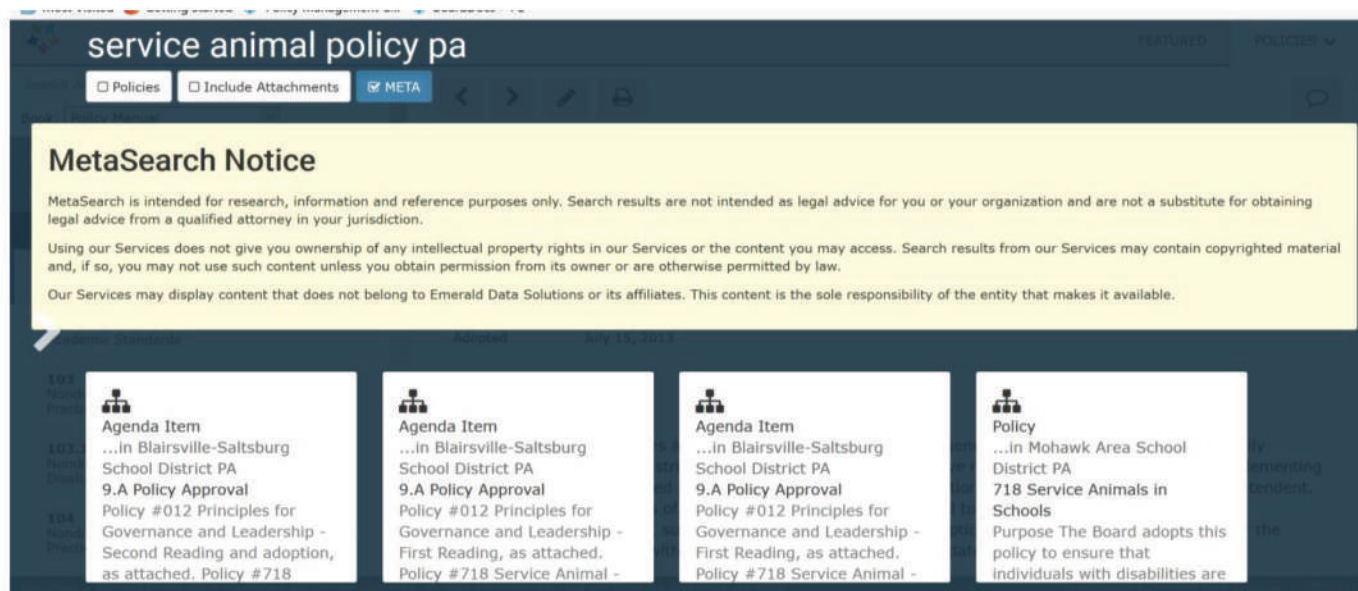
There is a search function built into each area of the Policies tab that will allow you to search all policies in that area of your policy manual (**Active, Draft** or **Retired**)



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:

100 matches found

service

□ Policies □

etaSearch

Search is intended for informational purposes only. It is not intended to be used as a substitute for obtaining legal advice from a qualified attorney. If you are unsure, please consult with your attorney. Our Services does not guarantee the accuracy of the information. If so, you may not be able to rely on the information. Services may display information that is not current.

Agenda Item ...in Blairsville School District 9.A Policy Approval Policy #012 Principles for Governance and Leadership - Second Reading and adoption, as attached. Policy #718

Agenda Item ...in Upper Perkiomen School District PA 718 Service Animals in Schools Purpose The Board adopts this policy to ensure that individuals with disabilities are permitted to participate in and benefit from district programs, activities and services, and to ensure that the district does not discriminate on the basis of disability.

Agenda Item ...in Canon-McMillan School District PA 904.1 Domestic Animals on District Property Authority The Board establishes that no owner or person in control or possession of a dog or cat shall be required to have the dog or cat spayed or neutered.

Agenda Item ...in Shippensburg Area School District 718 Service Animals in Schools Purpose The Board adopts this policy to ensure that individuals with disabilities are permitted to participate in and benefit from district programs, activities and services, and to ensure that the district does not discriminate on the basis of disability.

Policy

Title 718 Service Animals In Schools

Section 700 Property

Adopted Monday, December 12, 2016

Content

Purpose

The Board adopts this policy to ensure that individuals with disabilities are permitted to participate in and benefit from district programs, activities and services, and to ensure that the district does not discriminate on the basis of disability.

Definitions

Service animal means any animal individually trained to do work or perform tasks for the benefit of an individual with a disability.

The work or tasks performed by a **service animal** shall be directly related to the individual's disability. Examples of work or tasks include, but are not limited to, assisting individuals who are blind or have low vision with navigation and

Close

Governance and Leadership - First Reading, as attached. Policy #718 Service Animal -

Governance and Leadership - First Reading, as attached. Policy #718 Service Animal -

Purpose The Board adopts this policy to ensure that individuals with disabilities are

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

School District PA 9.A Policy Approval Policy #012 Principles for Governance and Leadership - Second Reading and adoption, as attached. Policy #718

District PA 7.01 Staff Services Agenda Items AgendaCall to OrderExecutive Session for Personnel Items 7:30 a.m.Recognition of

School District PA 718 Service Animals in Schools Purpose The Board adopts this policy to ensure that individuals with disabilities are

District PA 103.1 Service Animals Purpose The Apollo-Ridge School District does not discriminate on the basis of disability. Persons with

Policy ...in Wallenpaupack Area School District PA 718 Service Animals in Schools Purpose The Board adopts this policy to ensure that individuals with disabilities are

Policy ...in Upper Perkiomen School District PA 718 Service Animals in Schools Purpose The Board adopts this policy to ensure that individuals with disabilities are

Policy ...in Canon-McMillan School District PA 904.1 Domestic Animals on District Property Authority The Board establishes that no owner or person in control or possession

Policy ...in Shippensburg Area School District 718 Service Animals in Schools Purpose The Board adopts this policy to ensure that individuals with disabilities are

Sample policies are intended for educational and informational purposes only, and should not be adopted as policy by your school entity without input from the solicitor. The advice of the solicitor or other competent counsel always should be obtained when drafting local policies and determining the legal ramifications and requirements applicable to any particular situation or cause of action.