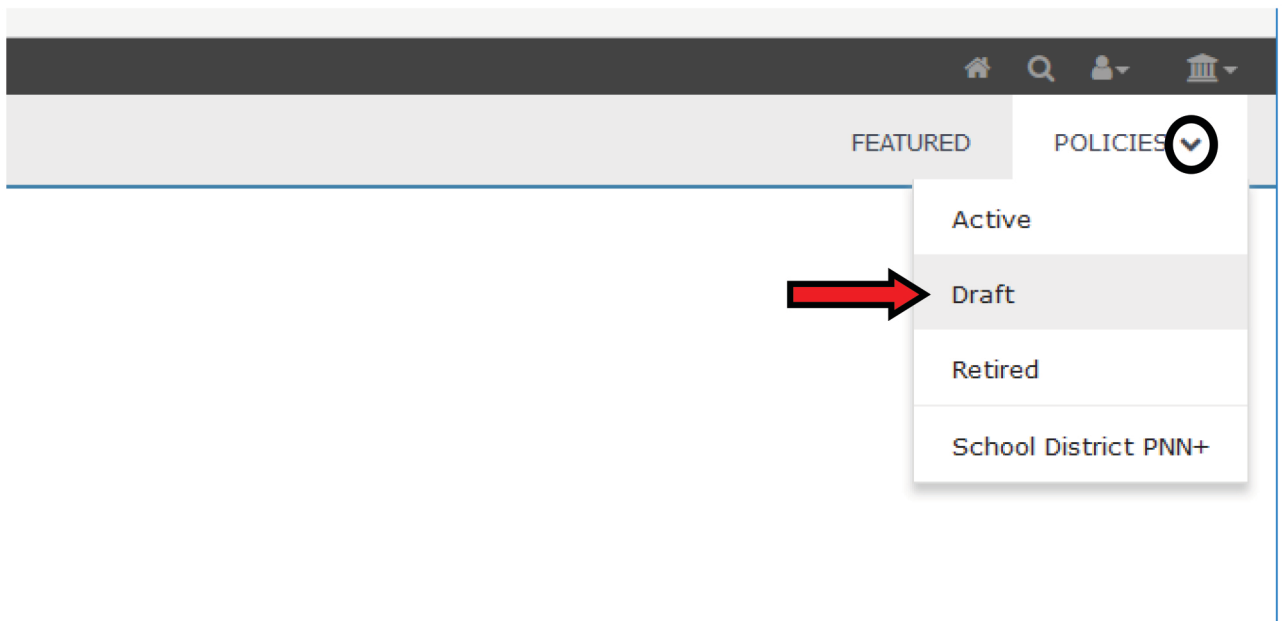# Web-Based Policy System

Workflow – Reviewing Draft Policy Guides

- Policy Services will send an email to the designated policy contact upon completion of a section of draft policy guides.

- Draft policy guides will appear in the **Draft** area of the web-based policy system.

- To go to the **Draft** area of your policies, log in to the web-based policy system, click on the downward facing arrow on the right side of the policies tab at the ride side of the screen (circled below) and then click on Draft.

- Draft policies will appear in the navigation panel on the left side of the screen.

Clicking on the section title will expand/collapse the Table of Contents for each section.

Clicking on an individual policy will bring the policy up in the reading panel to the right.

- Editing draft policies

  - Click on the policy and click the pencil icon to Edit.

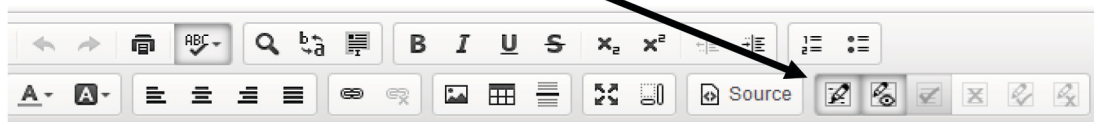- Revise the applicable fields, such as **Title**, if that needs to be changed.

Set the **Status** to the applicable category you have established for your school entity's policy review process (i.e., Administrative Review, Legal Review, First Reading, etc.).

Date fields will be revised once the board of trustees has approved the revisions.

Leave the **Legal References and Footnotes** as is and create notes for Policy Services to revise these if necessary.

- Edit the body of the policy as necessary.
- **Tracking Changes** feature in the toolbar may be used to edit the policy so changes are marked up.

- Click the diskette icon at the top, left of the policy to **Save** it.

- Submit the policy through the board of trustees' established review and approval process.

- After the board approves the policy, notify Policy Services. **Please do not** change policy status to Active. Our staff will not be able to access your Active policies.

- Policy Services will process the policies (accepting tracking changes, adding any needed legal references, etc.). Policies will not need to be sent as attachments—policy staff will access the same policies in the Draft area of the web-based system.

- Once policies have been processed, the newly adopted policy should be made Active—policy staff will send you information on making a policy Active.

- Deleting a draft policy

  - Should the school entity decide not to adopt a draft policy; the policy can be removed from the Draft area by the school entity.

o To delete a draft policy, right click on the policy in the viewing panel and click delete

o A pop-up will ask you to confirm deletion of the policy. Click OK to delete.

Please contact heather.masshardt@bentcreekservices.com if you have any questions or concerns regarding your draft policies.