

# Web-Based Policy System

## Workflow – Sending Policies to Policy Services and Activating Policies

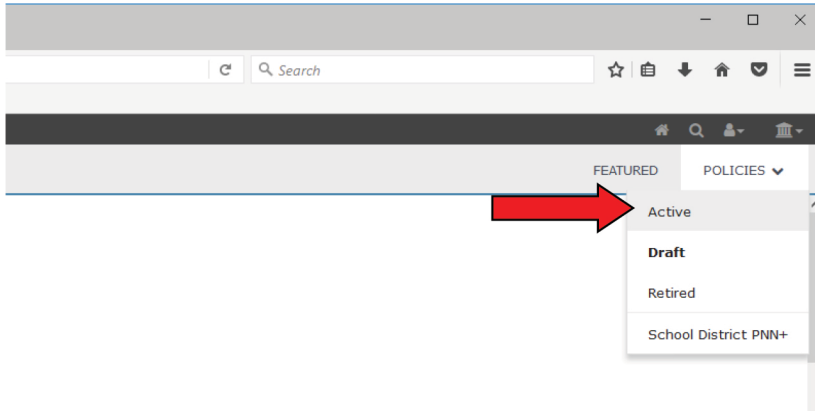
- After the board of trustees approves policies:
  - Enter the date of approval in the **Adopted, Last Revised** or **Last Reviewed** field, as applicable

The screenshot displays the 'Web-Based Policy System' interface. On the left, there is a 'Search Draft Policies' sidebar with a tree view of policy categories: 000 Local Board Procedures, 100 Programs, 200 Pupils (selected), 201 Test Admission of Students, 203 Vol II 2017 Immunizations and Communicable Diseases, 222 Copy of Tobacco, 227 Copy of Controlled Substances/Paraphernalia, 233 Copy of Suspension and Expulsion (highlighted), 300 Employees, 600 Finances, 700 Property, and 800 Operations. The main form area shows fields for Book (Policy Manual), Section (200 Pupils), Title (Suspension and Expulsion), Number (233), Status (First Reading), Adopted (10/14/2013), Last Revised (empty), Last Reviewed (empty), and Retired (empty). A red arrow points to the 'Last Revised' field. Below the form is a rich text editor with a toolbar and a 'Purpose' section containing text about student exclusions.

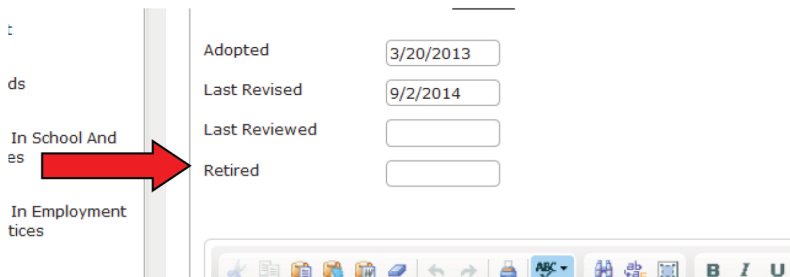
- Be sure the policies are saved in the **Draft** area of your Policies tab—**Policy Services cannot process Active policies**
- Send an email to [heather.masshardt@bentcreekservices.com](mailto:heather.masshardt@bentcreekservices.com) listing which policies have been approved by your board and the approval date
- Policy Services staff will review them from a policy perspective, make sure all formatting is accurate, and add any legal citation footnotes/legal references as necessary; staff will then send you a return email instructing you to make the policies **Active**

To activate policies:

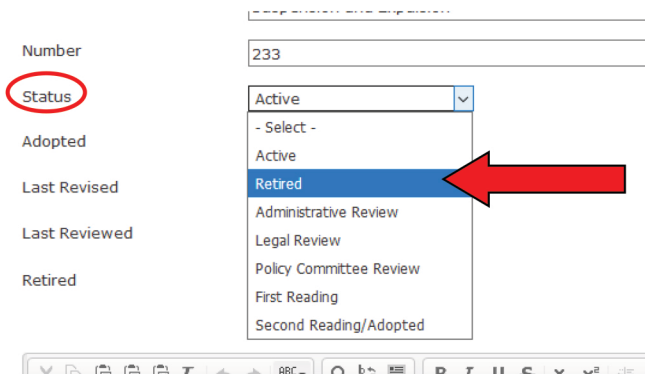
- If the policy is a **revision to a currently active policy**--go to the **Active** section of your Policies tab



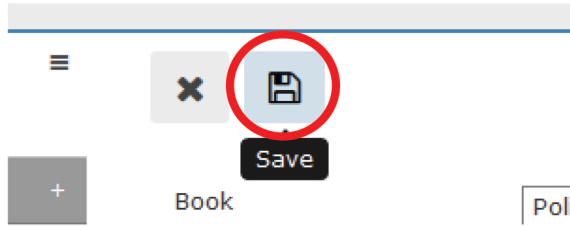
- Choose the currently active version of the policy, click on it and click the pencil icon to **Edit** it—enter the date of the board meeting at which the new version was approved into the **Retired** date field



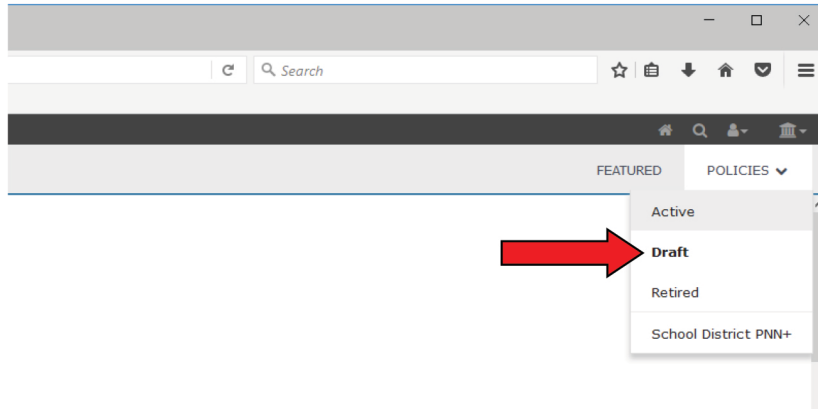
- Set the **Status** of the policy to **Retired**



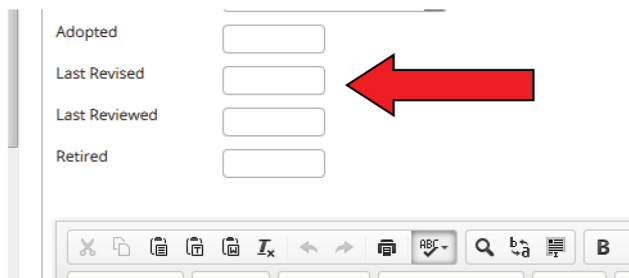
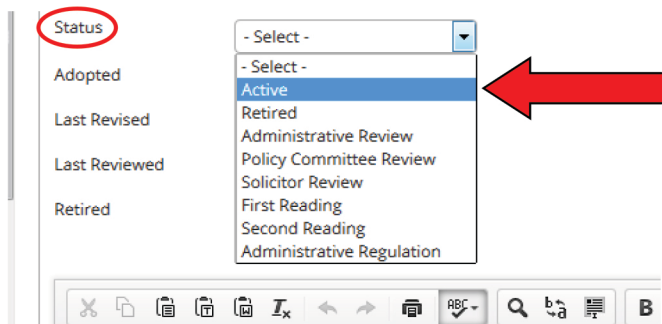
- Click the diskette icon to **Save** the policy (it will move it into the Retired area of your Policies tab)



- Go to the **Draft** area of your policies tab and click on the policy that was board-approved and processed by Policy Services



- Click the pencil icon to **Edit** the policy—set the **Status** to **Active** and ensure the **Adopted**, **Last Revised**, or **Last Reviewed** date is accurate



- Click the diskette icon to **Save** the policy (it will move it into the Active area of your Policies tab)