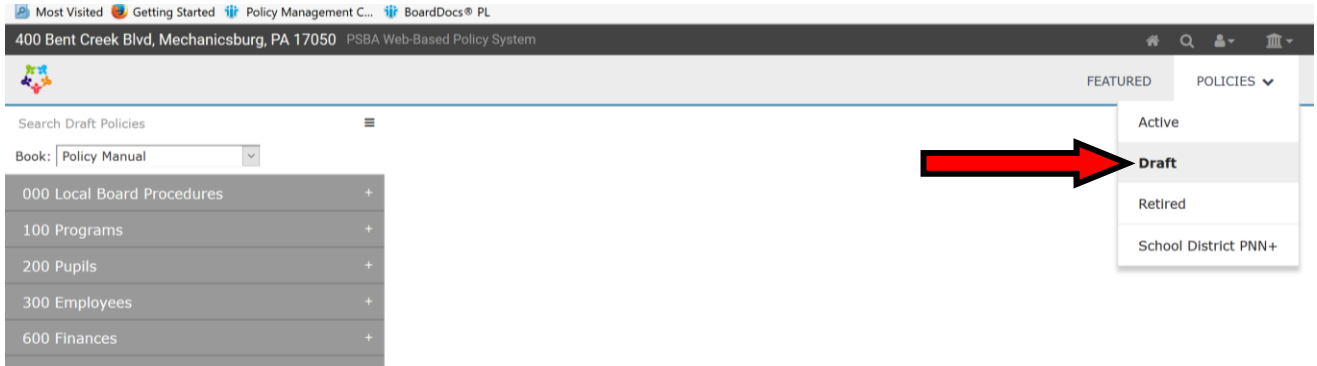




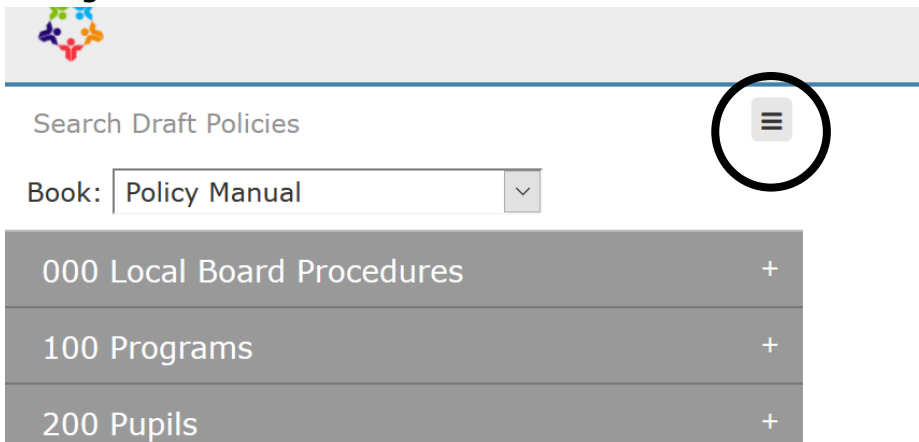
PSBA Web-Based Policy System

Workflow – Creating a New Policy

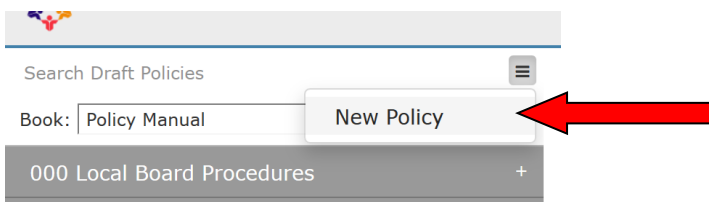
- Go to the **Draft** area of your policies



- Click on the icon with 3 horizontal lines at the top, right of the policy listing:



Select "New Policy" to create a new, blank policy



- Fill in the fields as noted

Book – select Policy Manual (if the school entity establishes other books at a later date, such as Administrative Regulations, you may choose those as appropriate)

Section – select the appropriate section or use **Create New** to create a different section (i.e., 100 Programs, 200 Pupils, etc.)

Title – Type in the title of the policy

Number – Type in the number of the policy—if you are unsure of a number, contact PSBA for a recommendation

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

Legal (at end of policy)– PSBA does not recommend adding Legal References here-- note in the policy what legal citations should be added next to applicable language, based on recommendations from your school solicitor; PSBA will add and link citations

The date fields will be filled in following the board approval process

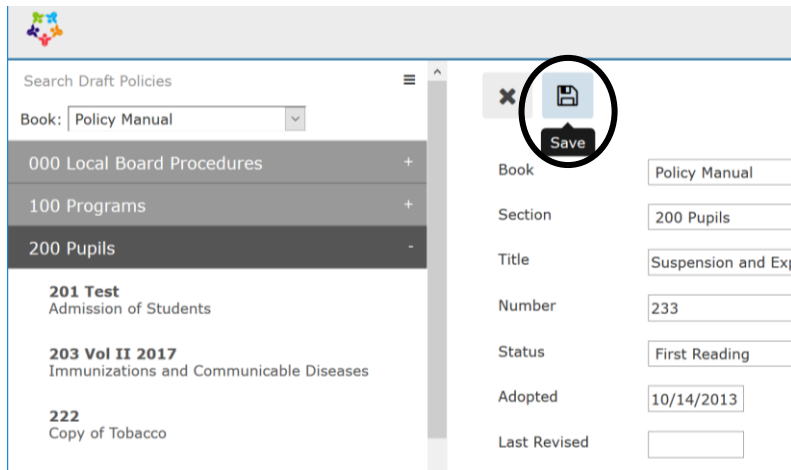
Type the text of the policy in the box under the text editor or copy and paste text

The screenshot displays the PSBA Web-Based Policy System interface. At the top, the address bar shows "400 Bent Creek Blvd, Mechanicsburg, PA 17050" and the page title "PSBA Web-Based Policy System". The main content area is divided into two columns. The left column contains a "Search Draft Policies" section with a "Book:" dropdown menu set to "Policy Manual". Below this is a list of sections with expandable options: "000 Local Board Procedures", "100 Programs", "200 Pupils", "300 Employees", "600 Finances", "700 Property", "800 Operations", "900 Community", and "Cross Reference Documents". The right column contains a form with the following fields: "Section" (a dropdown menu set to "- Select -"), "Title" (a text input field), "Number" (a text input field), "Status" (a dropdown menu set to "- Select -"), "Adopted" (a date input field), "Last Revised" (a date input field), "Last Reviewed" (a date input field), and "Retired" (a date input field). Below the form is a rich text editor with a toolbar containing various icons for text formatting and editing. The text editor area is highlighted in yellow and contains the text "Type or paste policy text here". An orange arrow points from the text "Paste Options" to the text editor area. At the bottom of the page, there is a footer with the text "BoardDocs is intended for the use of subscribers and licensed customers. All users are required to read and follow the acceptable use policy." and "BoardDocs® by Emerald Data Solutions, © 2002-2017."

For Copying/Pasting text into a policy, please use the “Paste as plain text” icon to avoid formatting issues:



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



- Submit the policy through the board’s normal review and approval process
- After the board approves the policy, you may send it to policymaintenance@psba.org and refer to the Workflow for Sending Policies to PSBA. (Policies will not need to be sent as attachments—PSBA will access the same policies in the web-based system)