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
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.)