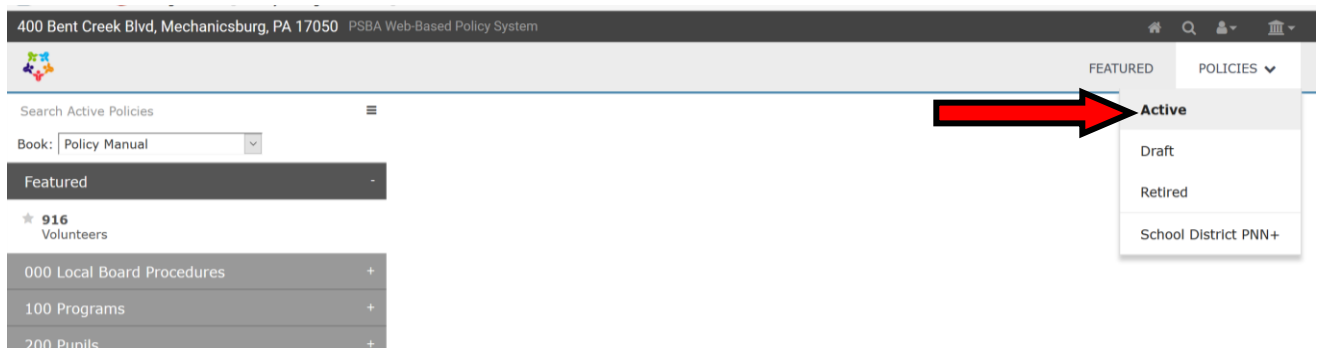




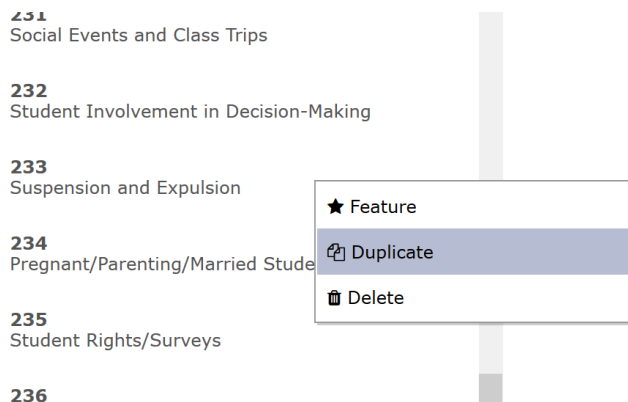
PSBA Web-Based Policy System

Workflow – Revising Current Policy Based on Local Need

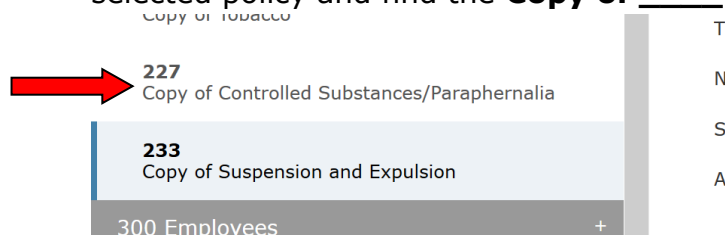
- To revise an existing, board-approved policy that is in the Active area, be sure to **duplicate** an Active policy, which moves a copy to the Draft area for editing—you want to keep the original Active policy where it is since it is the board-approved policy until the new version is approved
- Go to the **Active** area of your policies

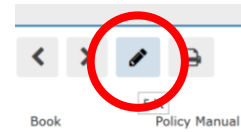


- Click on the policy to be copied, right click and select Duplicate



- The policy will be duplicated and appear in the **Draft** area—navigate to the selected policy and find the **Copy of _____** policy document created





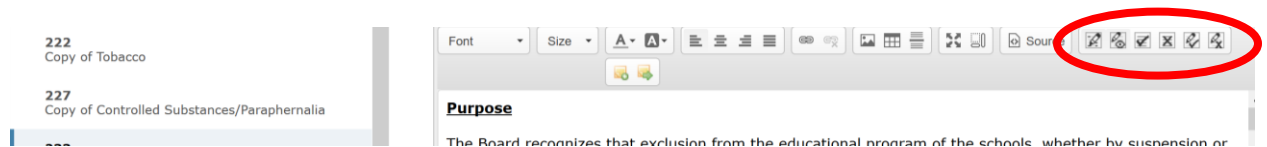
- Click on the policy and click the pencil icon to Edit.
- Revise the applicable fields, such as **Title** to remove the "Copy Of" and make any additional changes necessary

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

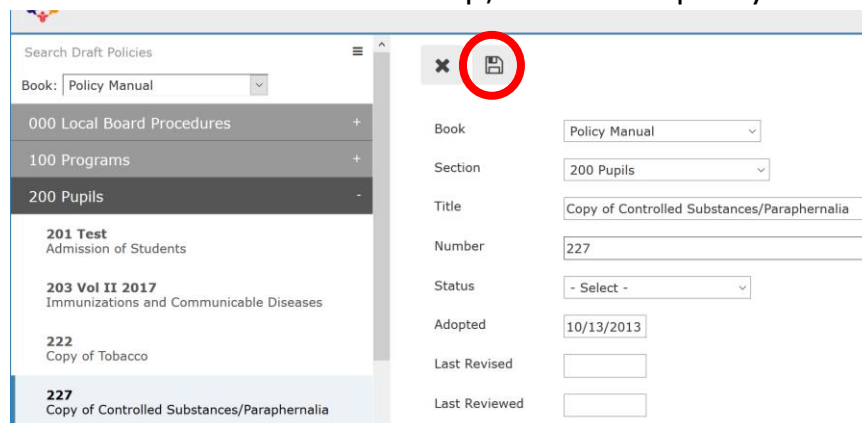
Date fields can be revised once the board has approved the revisions

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

- Edit the body of the policy as necessary. Use the Tracking Changes items in the text editor to mark changes (ensure Tracking Changes are enabled in the Options area)



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



- Submit the policy through the board's established 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)