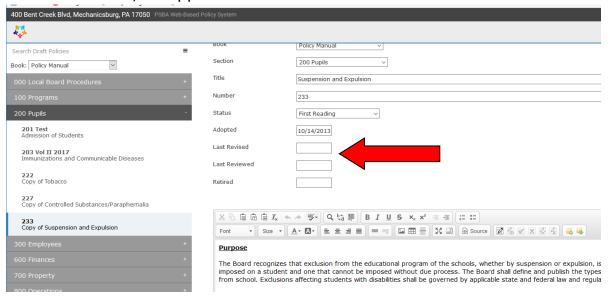


PSBA Web-Based Policy System

Workflow - Sending Policies to PSBA and Activating Policies

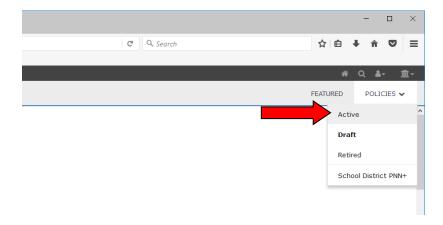
- After the board approves policies:
 - Enter the date of approval in the Adopted, Last Revised or Last Reviewed field, as applicable



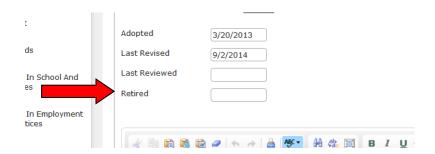
- Be sure the policies are saved in the **Draft** area of your Policies tab—**PSBA cannot process Active policies**
- Send an email to <u>policymaintenance@psba.org</u> listing which policies have been approved by your board and the approval date
- PSBA staff will review them from a policy perspective, 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:

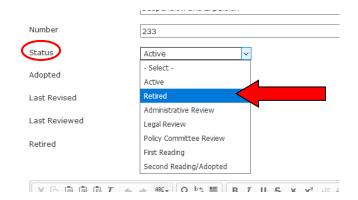
 If the policy is a <u>revision</u> to a currently active policy--go to the Active section of your Policies tab



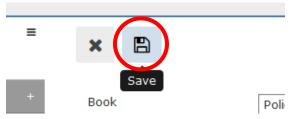
 Choose the currently active version of the policy, click on it and click the pencil icon to **Edit** it—enter the date of the board meeting at which the new version was approved into the **Retired** date field



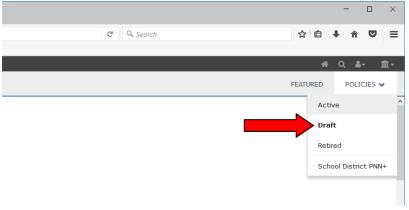
Set the Status of the policy to Retired



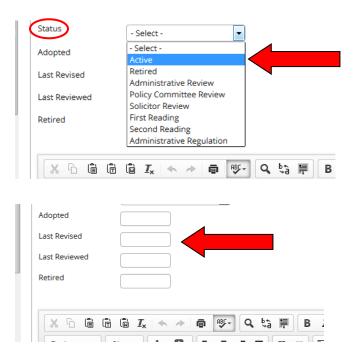
 Click the diskette icon to **Save** the policy (it will move it into the Retired area of your Policies tab)



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



 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)