

# 2023 PolicyBridge Cheat Sheet

## Policy Advisories:

Instructions for “Adding” a **NEW** document from *Policy Advisories awaiting adoption* folder (policy, regulation, or exhibit) to the manual that your district does not have/is missing (E.g., IHAMB-EA):

**NOTE:** IF YOU ARE MISSING THE DOCUMENT (under “Policy” column), YOU MUST **ADD** THE DOCUMENT BEFORE YOU CAN **ADOPT** THE DOCUMENT.

1. Locate the document in the *Policy Advisories awaiting adoption* folder and select **Add New Doc to TOC**. The Table of Contents for your District manual will appear.
2. Locate the section of the manual where the document is to be placed. E.g., if adding Exhibit IHAMB-EA, it will be placed in Section “1” **AFTER** Policy IHAMB (as well as, in this case, its regulation: IHAMB-R); **the policies are in alpha order. Placement order: Policy, Regulation, Exhibit**
3. Once you have **selected the document** (e.g., IHAMB-R) in your **TOC**, a dialogue window will open asking whether you wish to **place the document “before” or “after”** the document you have selected. You will choose to place the document either before (above) or after (below) the document you have chosen in the TOC (in this case, **after** IHAMB-R).
4. Under the **Policy** column header, it will **now** show the placement of the document (e.g. “Insert after IHAMB-R”) instead of “Document Missing.” You may now select the button under the **Adopt** column header, and select **Submit**. In the dialogue window, **USE THE CALENDAR** to select the date of adoption; for **Notes**, indicate that it is a **Policy Advisory/PA, and the adoption date**. (*Using the calendar ensures you are using the proper format: 2 digits for month, 2 digits for day, and 4 digits for year.*)
5. Select **submit**; when you **refresh** your screen, you will be able to **see** this newly adopted **document in your TOC/**Table of Contents for your District’s manual.

Instructions for **opening** a document from the *Policy Advisories Awaiting Adoption* folder to “**Edit**”: **NOTE:** if a document requires **District information** (e.g., you need to include coordinator’s information, copy fees, etc.), you may **not** select “Adopt” until you have added the **PA version Draft to Manual** for editing (the “Adopt” button would be disabled).

1. Locate the document in the *Policy Advisories Awaiting Adoption* folder, and select **Add PA version Draft to Manual** – this draft may be edited now, or you may save & continue editing at a later date. The saved draft would then be in *Policies Requiring My Attention (MyDocs)*.
2. In *Policies Requiring My Attention (My Docs)* folder, select the document to edit. Edit the document as needed (look for **blanks** ( ) and **bold language** instructions).
3. Scroll to the bottom of the page to the "grey" shaded "Meta Data" area.
4. Choose **Save and Process** which will open an **adoption window**.
5. **Note** the document as being a **PA revision**; also include the **date of adoption** in the note for easy reference.
6. If the document is a **Policy**, you will **submit** using **Governing Board adopted policy on:** (provide adoption date **using calendar**) . If the document is a **Regulation or Exhibit**, **submit** by selecting **Superintendent approved regulation or exhibit on:** (provide adoption date **using calendar**).
7. **Submit** (wait for notification that the document has been submitted). This newly edited version’s status will **now** show as a “Review” which we/ASBA will then publish.

## Editing a District Document:

Instructions for opening and “**EDITING**” a document from the TOC/Table of Contents **initiated by Governing Board/Admin. – NOT from a Policy Advisory.**

1. **Locate the document** that requires editing in your District manual’s TOC/table of contents, “**right-click**” on the document and select ***Edit Selected Document***.
2. **Edit the document** as needed. Remember to **CHANGE THE DATE at the bottom** of the **POLICY** document where it notes the **Adoption Date**.
3. Scroll to the bottom of the page to the “grey” shaded “Meta Data” area. Choose ***Save and Process*** which will open an adoption window. **Note District revision(s) and date of adoption**. If the document is a **Policy**, you will submit using ***Governing Board adopted policy on:*** (provide adoption date **using calendar**). If the document is a **Regulation or Exhibit**, submit by selecting ***Superintendent approved regulation or exhibit on:*** (provide adoption date **using calendar**).
4. **Submit** (wait for notification that the document has been submitted).

## Creating a District Document:

Instructions for creating a **NEW Regulation or Exhibit: (E.g., JHD-ED)**

1. **Find where this new District document would go** in your District manual’s **TOC, right-click**, and select **Add Regulation or Add Exhibit**. Select ***Above*** or ***Below*** (in this case, ***Add Exhibit, Below JHD-EC***).
2. Create your Exhibit, and scroll to the “grey” shaded Meta Data area. Change the title & code to reflect this new document; select ***Save and Process***.
3. Enter notes and submit to ASBA for Review **OR Superintendent approved regulation or exhibit on:** (provide adoption date **using calendar**).

*Thank you, and please contact us with any questions; we are here to help.*



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***We are here to support you!***