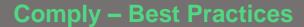


Best Practice - Employee Policy Annual Review (Susquehanna Community SD)

How To – To create this item on your portal, follow the directions below.

- 1) Log into Comply
- 2) Supervision Management → Templates
- 3) Search for and locate the Template called *Best Practice* Employee Policy Annual Review (Susquehanna Community SD)→ View
- 4) From the item's detail page, select Actions → Duplicate
- 5) From the edit compliance item page, customize the item to the unique needs of your school district.
 - a. Title edit as needed
 - b. Description edit as needed
 - c. Compliance Cycle Type leave as Item Timeline
 - d. Start Date and End Date dates can be edited within the Recurrence
 - e. Instructions edit as needed
 - f. Person of Contact add person(s) of contact
 - g. What is required of the user? leave as is (box checked for Completed Questionnaire)
 - h. Reminders edit as needed
 - i. Questionnaire editing questionnaire will occur in step 7
 - j. Resources add district specific links or documents as needed
 - k. Recurrence edit dates/recurrence as needed
 - Approval Stages add at least one stage of approval
 - m. Tags add tag as needed
 - n. Act 48 ignore / not applicable
- 6) Save, Publish, and Close the item.
- 7) From Questionnaire Management → Templates
 - a. Locate the Template titled, Annual Policy Review Verification Template → Actions →
 Edit
 - b. From the Edit Questionnaire page, customize the item to the unique needs of your school district.
 - Form Title edit title as needed and be sure to remove template copy.
 - Edit Question as needed to add and/or remove additional policies.
 - When finished Save → Close
- Next, locate your item from Supervision Management → All Items page → View
- 9) From the Roster section, click the blue Add Users icon.
 - a. There are three basic ways to add users.





- Search for and add users by utilizing the blue Get All Users button
- Search for and add users individually by utilizing the search field in the left hand column
- Search for and add users by utilizing Groups
- b. Once added, users will be assigned to the item, and they will receive an email. Included in the email is their due date, person of contact, instructions, and a link back to the item within Comply.