

# Policy Management

How to get started?



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# Introduction

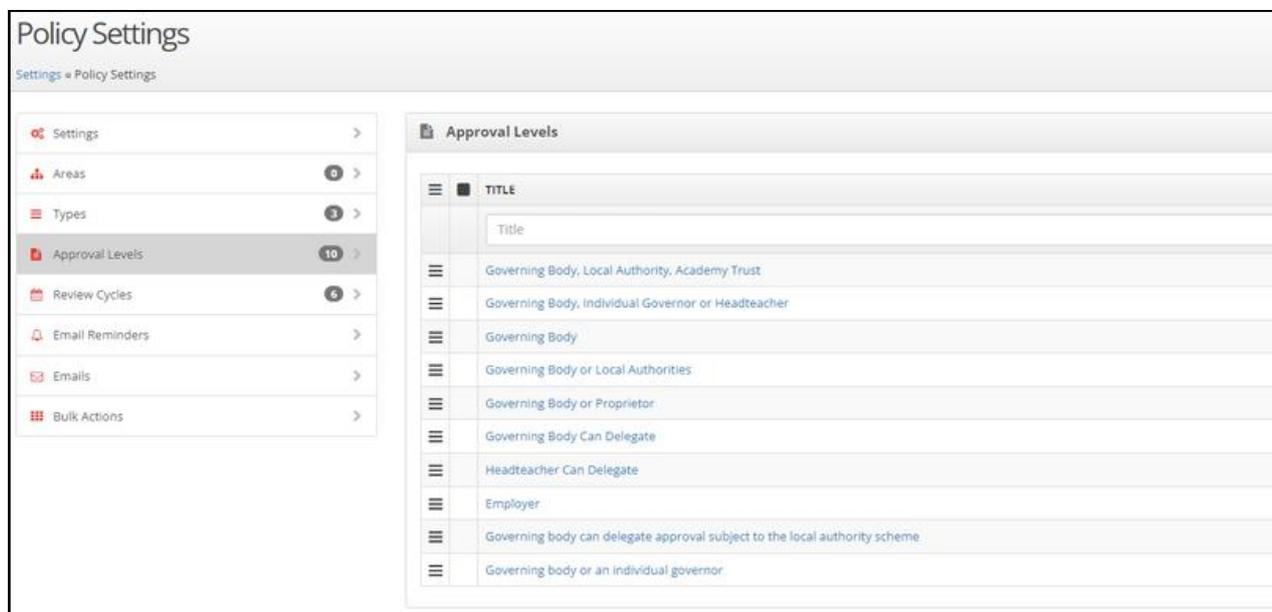
The new Policy Management module is a central place to store and manage all your policy documents. The iP Suite will enable you to streamline the whole policy management process.

Policies may be uploaded in bulk and assigned to key staff within your organisation. Reminders are sent once the review date is reached and the policy can be reviewed and updated where necessary. The policies are next passed through any number of approvers, including governors, and signed off before being re-published.

The iP Suite Policy Management module helps you keep on top of managing your policies.



# Settings



## Accessing the settings

You can access the Policy Management settings by clicking Policies in the menu on the left-hand side of the screen. The Policies will now be displayed. To access the settings simply click the "cogs" icon located at the top right of the screen.

**NOTE** - *If you do not see the "cogs" icon you do not have the right to access the settings. Please see your administrator.*

You may return back to the Policies by clicking the blue "Policies" button at the top right of the screen. This button will toggle between settings and policies.

## Amending the settings

The settings that may be changed include:

**Settings** - these set of checkboxes determine whether certain columns are displayed on the view of Policies.

**Areas** - the Policy Area. Not essential, but allows you to split policies into key areas.

**Types** - the type of policy e.g. DfE, Trust, School/College.

**Approval Levels** - the level required to approve a policy e.g. Governing Body, Local Authority, Academy Trust, Headteacher.

**Review Cycles** - how often is the policy to be reviewed? E.g. Annually, Live Document, Every 3 Years.

**Email Reminders** - how often are the reminder emails sent? Are they sent before it is due, on the day it is due or every day afterwards?

**Emails** - these are the emails that may be sent as part of the process of reminding about the approval, review and viewing process.

## Bulk Actions

**Import Policies** - this option will import the publicly available policies into the system as defined by the UK .gov website. These are simply placeholders for each of the required policies.

**Upload Policies** - a useful option if you have already written your policies and have the documents located either on your local machine or available on your network. Rather than adding policies individually, you can drag and drop multiple policies in one simple step to upload them into the system.

# Managing your policies

**CREATION**

[Creation by the owner]

**APPROVAL**

[Approval by staff or groups of staff]

**REVIEW**

[Review on a periodic basis]

**VIEWING**

[Viewed by staff]

**ACKNOWLEDGE**

[Acknowledge dby staff]

Let's take a quick walk through the lifetime of a policy.

Firstly, a policy is created and assigned an owner. There may be a certain amount of work to get the initial policy document to a point where it is ready to be shared with a third party. At this point, you will define an approver (or group of approvers), who will approve the policy prior to publication.

Staff who are nominated as "approvers" will receive an email notification and be able to approve the policy, ready for publication.

Next, the policy will be reviewed on a periodic basis. This could be annually, every three years or a time period of your choosing, depending on your requirements. Again, an email reminder is sent to notify staff who are required to review a policy.

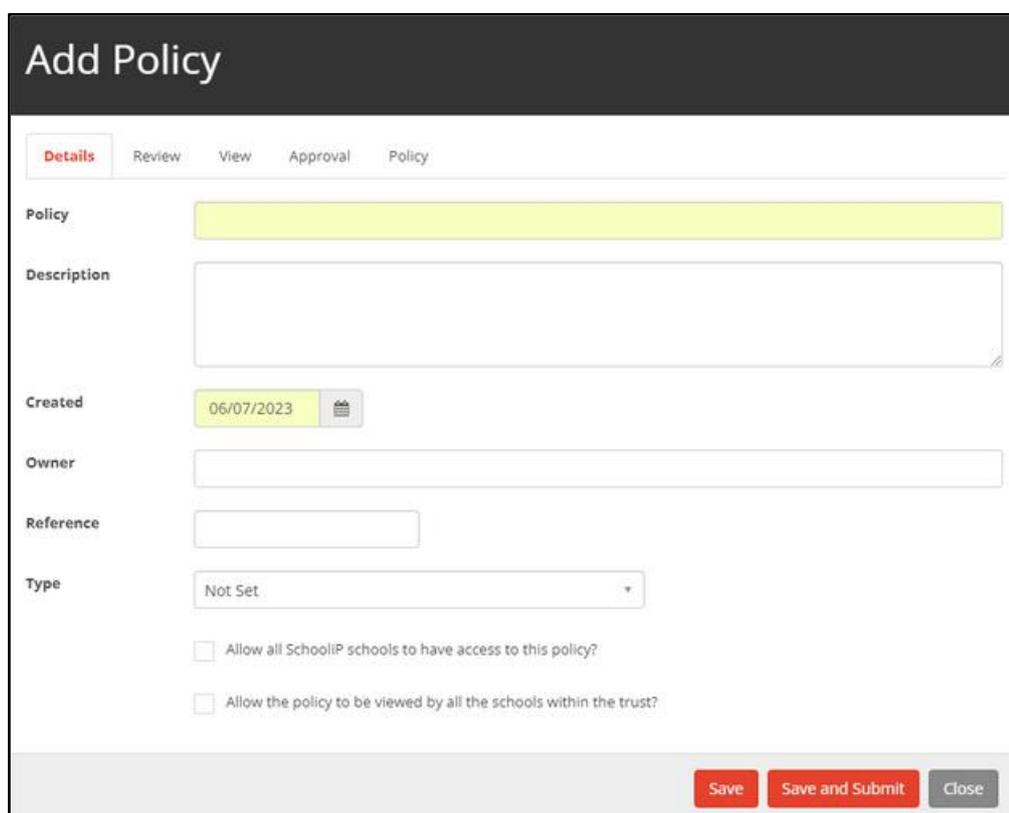
Finally, the system will audit which staff have both viewed and/or acknowledged a policy, ensuring that all staff see and proactively report sight of a policy.

Let's take a look at how each of these steps are configured when first creating a policy.

# Creating a policy

It's simple to get started and create a policy. Select the Policies option from the tree on the left and a view of all policies will be displayed.

To add a new policy simply click the red button labelled "Add Policy".

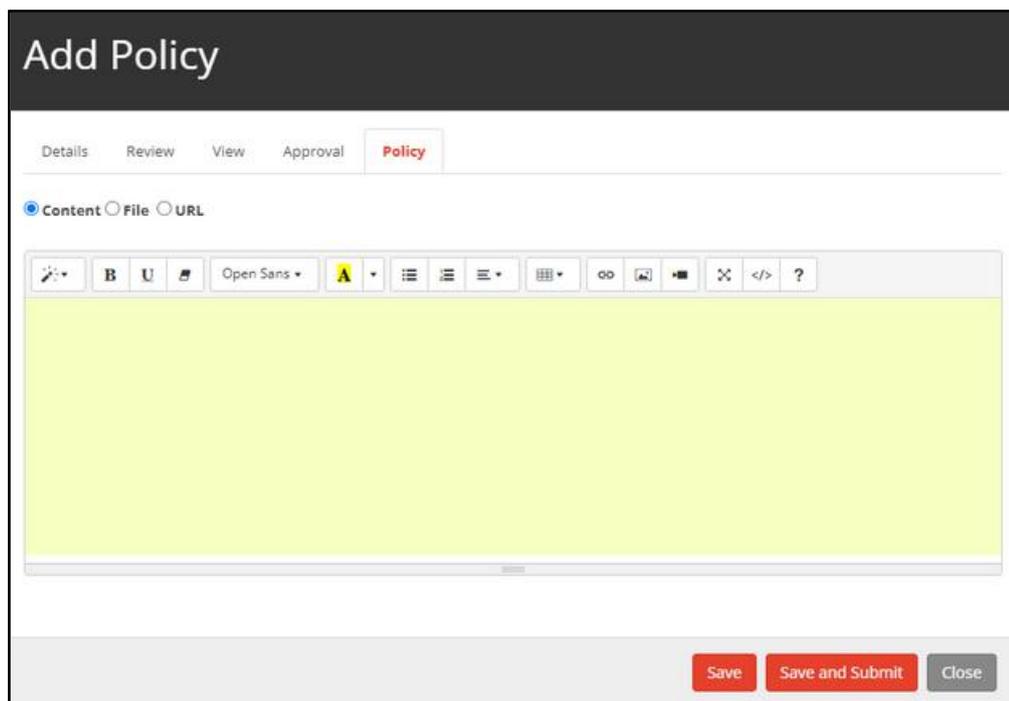


In the resulting dialog, you will have the option to enter the name of the policy, a brief description, a reference and then the ability to define who the owners of the policy will be.

You may select the type of policy from the dropdown list.

There are two tick boxes which allow the sharing of this policy with all schools/colleges and the ability for the policy to be viewed by all schools/colleges within the group.

There is also the ability to define the policy itself. Click the policy tab to see the three options for writing and recording the policy document.

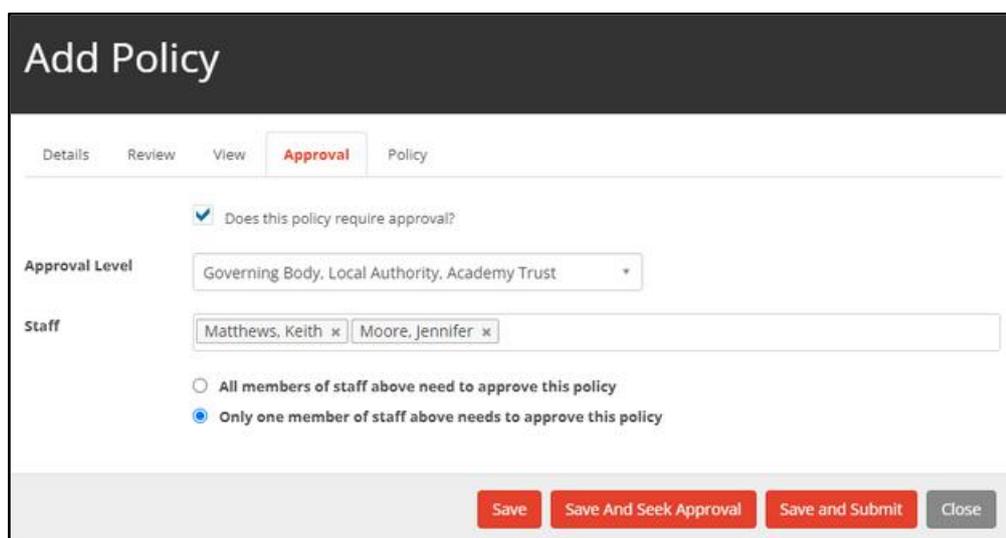


You may either:

- specify the content directly in the rich-text editor within the Policy Management tool, using all the normal features available including text formatting, adding hyperlinks, images and videos too.
- upload a file
- provide a link to an external file e.g. Google Docs or Office 365.

# Policy approval

When creating or editing a policy you may set the approval process by selecting the approval tab.



The screenshot shows the 'Add Policy' form with the 'Approval' tab selected. The form includes a checkbox for 'Does this policy require approval?' which is checked. Below this is a dropdown menu for 'Approval Level' with the text 'Governing Body, Local Authority, Academy Trust'. Underneath is a 'Staff' field containing two entries: 'Matthews, Keith' and 'Moore, Jennifer'. At the bottom, there are two radio buttons: 'All members of staff above need to approve this policy' (unselected) and 'Only one member of staff above needs to approve this policy' (selected). The form also features four buttons at the bottom: 'Save', 'Save And Seek Approval', 'Save and Submit', and 'Close'.

If you select the tickbox to indicate that the policy requires approval, you may then select from the following options.

**Approval Level** - at what level is approval required e.g. Governing Body, Local Authority or Academy Trust?

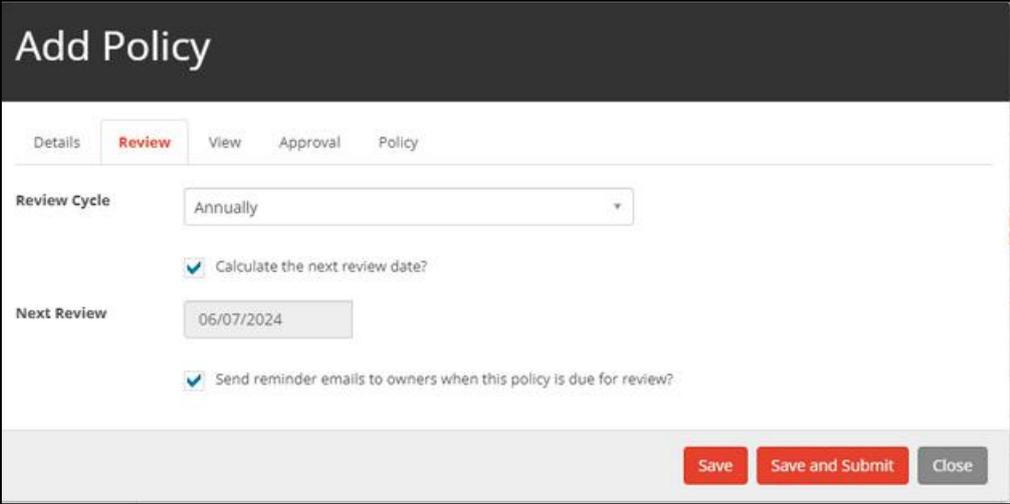
You may then select the appropriate staff that you feel will be able to approve and operate at the prescribed levels.

Finally, there is a radio button which toggles between whether;

- all members of staff identified need to approve the policy or
- only one member identified needs to approve the policy

# Reviewing a policy

When creating or editing a policy you may set the approval process by selecting the Review tab.



The screenshot shows the 'Add Policy' form with the 'Review' tab selected. The form has a dark header with the title 'Add Policy'. Below the header, there are five tabs: 'Details', 'Review' (highlighted in red), 'View', 'Approval', and 'Policy'. The 'Review' tab contains the following fields and options:

- Review Cycle:** A dropdown menu currently set to 'Annually'.
- Calculate the next review date?
- Next Review:** A date input field showing '06/07/2024'.
- Send reminder emails to owners when this policy is due for review?

At the bottom right of the form, there are three buttons: 'Save' (red), 'Save and Submit' (red), and 'Close' (grey).

**Review Cycle** - a dropdown list indicating how often the policy is to be reviewed.

You may then select the "Calculate the next review date" tickbox which will automatically calculate the next date for you. Alternatively, if you do not wish for this to be the case you may untick the tickbox and set the date manually.

Finally, there is a tickbox indicating whether reminder notification emails will be sent to the owners of the policy.

# Viewing/Acknowledging a policy

When creating or editing a policy you may view who has viewed and/or acknowledged a policy, by clicking on the View tab.

**Edit Policy**

Details Review **View** Approval Policy History

Allow all staff to view this policy?

**Roles**

Policy has been made visible on the school web site?

**Staff yet to view this policy**

Adamson, Jenny	Allcot, Jessica	Arooney, Jean	Ash, Beena	Bidoof, Janet	Blackman, Charlie	Boon, Debbie
Broadberry, Gill	Brown, Alison	Chetwin, Emma	Clancy, Jessica	Cooper, Wayne	Croft, Nigel	Danica, Evelyn
Deep Dive, English	Deep Dive, Maths	Donatien, James	Dyson, Sarah	Eagles, Jessica	Fitt, Cieran	Foreman, Gary
Francis, Jules	Frazer, Holly	Gregory, Helen	Haynes, Paul	Hendo, Audrey	Hewitt, Jon	Hope, Michael
Howard, Joseph	Howard, Joseph	Howard, Joseph	Howard, Joseph	Howard, Joseph	Howard, Joseph	Howard, Joseph
Jason, Freddy	Jones, Rosie	Kapoor, Sonny	King, Luke	Lockwood, Lucy	Long, James	Martin, Jon
Moore, Jennifer	Moore, Jonathan	Morris, Jodie	Newbold, Sally	Parker, Jon	Peters, Olivia	Powers, Frank
Reinard, Gareth	Reinard, Gareth	Reinard, Gareth	Reinard, Gareth	Reinard, Gareth	Reinard, Gareth	Reinard, Gareth
Salmon, Joseph	Smith, Anna	Standing, Georgia	Tatam, Luke	Toton, Kelly	Walker, Hannah	Walters, Ian
White, Stuart	White, Stuart	White, Stuart	White, Stuart	White, Stuart	White, Stuart	White, Stuart
Woodham, Laura	Woodham, Laura	Woodham, Laura	Woodham, Laura	Woodham, Laura	Woodham, Laura	Woodham, Laura

Do all staff need to agree this policy?

**Staff yet to agree this policy**

Adamson, Jenny	Allcot, Jessica	Arooney, Jean	Ash, Beena	Bidoof, Janet	Blackman, Charlie	Boon, Debbie
Broadberry, Gill	Brown, Alison	Chetwin, Emma	Clancy, Jessica	Cooper, Wayne	Croft, Nigel	Danica, Evelyn
Deep Dive, English	Deep Dive, Maths	Donatien, James	Dyson, Sarah	Eagles, Jessica	Fitt, Cieran	Foreman, Gary
Francis, Jules	Frazer, Holly	Gregory, Helen	Haynes, Paul	Hendo, Audrey	Hewitt, Jon	Hope, Michael
Howard, Joseph	Howard, Joseph	Howard, Joseph	Howard, Joseph	Howard, Joseph	Howard, Joseph	Howard, Joseph
Jason, Freddy	Jones, Rosie	Kapoor, Sonny	King, Luke	Lockwood, Lucy	Long, James	Martin, Jon
Moore, Jennifer	Moore, Jonathan	Morris, Jodie	Newbold, Sally	Parker, Jon	Peters, Olivia	Powers, Frank
Reinard, Gareth	Reinard, Gareth	Reinard, Gareth	Reinard, Gareth	Reinard, Gareth	Reinard, Gareth	Reinard, Gareth
Salmon, Joseph	Smith, Anna	Standing, Georgia	Tatam, Luke	Toton, Kelly	Walker, Hannah	Walters, Ian
White, Stuart	White, Stuart	White, Stuart	White, Stuart	White, Stuart	White, Stuart	White, Stuart
Woodham, Laura	Woodham, Laura	Woodham, Laura	Woodham, Laura	Woodham, Laura	Woodham, Laura	Woodham, Laura

Save Save And Seek Approval Close

There is a tickbox to indicate whether all staff may view this policy. If this is deselected, you may choose individual staff whom you wish to view this policy.

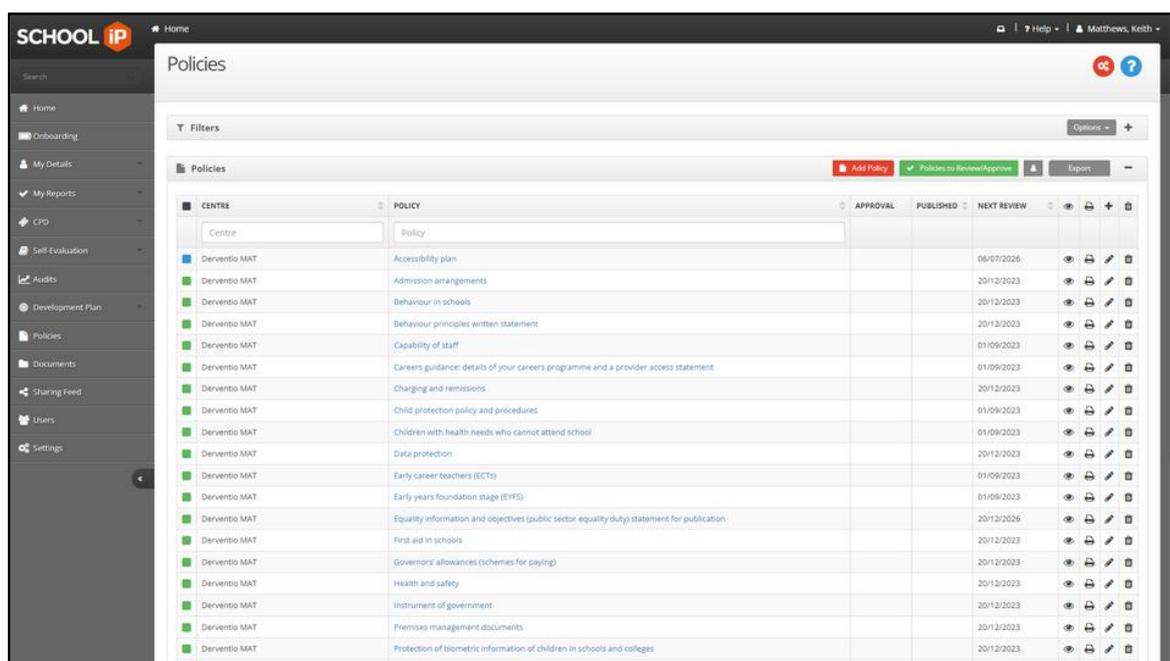
There is also an indicator of whether this policy has been published on the school/college website

**NOTE:** the publication of policies is a manual process and outside the scope of this tool.

There are then two lists of staff indicating whether staff have viewed and/or agreed or acknowledged this policy.

# Reviewing your policies

You can quickly and easily review your policies from the main view by selecting Policies from the contents tree on the left.



A status icon will appear to the left of each policy indicating the current status of the policy e.g. updated, submitted, etc

The next approval, next review and published date is clearly displayed on the view too.

You may filter the policies to show those that need to be reviewed or approved. You may also filter to those policies where you are identified as the owner.

There is also a list of filters available at the top of the view with the following options and more :

- Approval
- Policies overdue
- Policies that require staff to agree to them?
- Policies that require staff to view them?
- Policy has been made available on the school/college web site

For inquiries,  
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