

**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
  - l. 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
- 8) 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.