



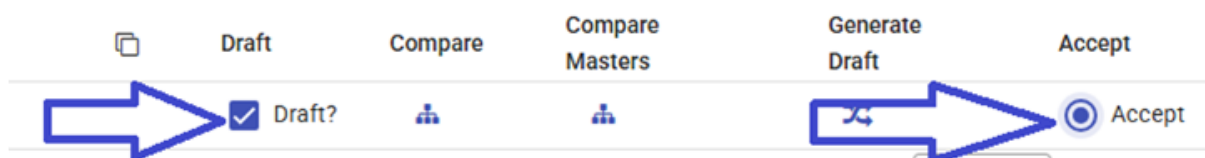
Accessing Work Queues

1. **Click** on any document in your Table of Contents (TOC) first **(this is an important first step)**
2. In the left navigation pane, select the **Editor Menu** (pencil icon)
3. Select **My Work** to access:
 - a. **My Documents**
 - b. **Document Advisories Awaiting Adoption**
 - c. Work History
 - d. Session History

NOTE: If you are unable to access these options, please contact the ASBA Policy Services Team using the contact information below. We may need to make an adjustment to your access settings on our end.

Editing Policy Advisories

1. Follow Steps 1-3 under **Accessing Work Queues** to access your *Document Advisories Awaiting Adoption* queue.
2. To create a draft, check the box next to **Draft?**, select *Accept*, and then select *Submit* (see screenshot below). If the document is not currently in your manual, see the note below before completing this step. Once submitted, the document is removed from your *Document Advisories Awaiting Adoption* queue and placed in your *My Documents* queue. In your TOC, the icon next to the policy document will now appear yellow with a pencil, indicating there is a draft version of the document. The **Draft?** box will automatically be checked if the document requires District-specific information.



NOTE: If the document is not currently in your manual (e.g., a new document), it must first be inserted into your TOC before you can create a draft. Select the blue plus-sign box to open the pop-up window, then choose the document that is closest alphabetically to the new document you are adding (e.g., if you are adding a new Policy BAAA, you would select BAA-EB). Next, select *Before* or *After* in the lower left corner of the pop-up window to place the new document in the correct location in your TOC (e.g., you would place BAAA *After* BAA-EB). Once the document has been inserted, you may create a draft by checking the **Draft?** box, then selecting *Accept* and *Submit*. Be sure to refresh your screen to view the document in your *My Documents* queue and in your TOC **(this is an important step!)**. Please also remember that Regulations are placed above/before Exhibits in the TOC.



You may then access the draft to edit in one of two ways:

- a. Select the Editor Menu (pencil icon) in the left navigation pane, then select *My Work*, then *My Documents*; **or**
- b. Select the document in your TOC and then select the pencil icon at the **top** of the document window.

To save your edits, select the floppy disk/save icon on the top navigation bar, enter a note explaining the reason for the edit (e.g., Board adopted Policy Advisory 999 on 5/1/26 or Superintendent approved revised regulation on 5/1/26), and select *Save* again. This is now a saved draft that will need to be sent for publication (see *Submitting Revised Documents to ASBA for Publication from the My Documents Queue* below).

Publishing Documents from Document Advisories Awaiting Adoption Queue

1. Follow Steps 1-3 under **Accessing Work Queues** to access your *Document Advisories Awaiting Adoption* queue.

NOTE: You *may* need to link a document that is already in your TOC. If so, you will see a blue plus-sign box on the left side. Select the blue plus-sign box, then select the actual document from the pop-up window. Do not choose *Before* or *After* unless the document is not currently in your TOC. Once you have chosen that same document that is in your TOC, choose *Select*. The document will now be linked, and you may use the comparison feature, create a draft for editing, or *Accept/Decline* the Policy Advisory version. Complete the same steps to link a document that is **NEW** to your manual; however, you will need to choose *Before* or *After* to correctly place the document, and then choose *Select*. Instead of a plus sign, it will now show where that document will be placed in your TOC.

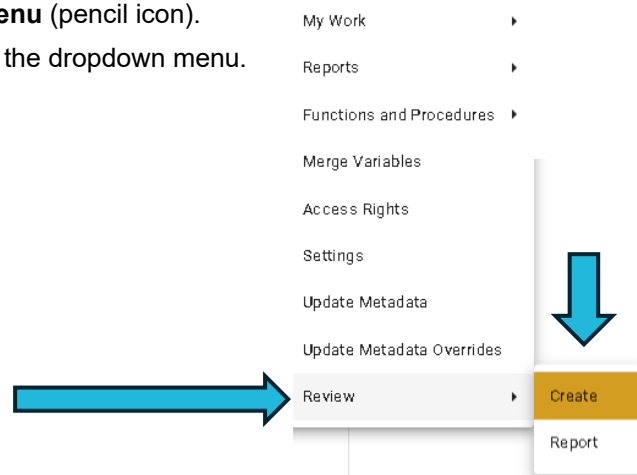
2. If a document does not need to be edited, select *Accept* to the right of the document, and select *Submit* in the lower left corner. You will then **Choose An Adoption Date** for the document: if this is a Policy, enter the Board adoption date; if this is a Regulation or Exhibit, enter the Superintendent approval date. Next, enter your Note (e.g., Board adopted PA 999 on 5/1/26), and select *Continue*. The document will now be published in your manual. **Remember to check the adoption dates on policies that are new to your manual; if the date shows the publication date, contact ASBA to correct the date on your behalf or edit the date manually and submit to ASBA for publication.**

NOTES: You may *Accept* multiple documents at a time that have the same Adoption Date before submitting. Also, if the document does not pertain to your district, select *Decline* to remove it from your queue. Remember, if a document is being deleted from the model manual, and your district has also decided to remove it, select *Accept* as you are accepting this change to your manual. Finally, to view documents in this queue alphabetically, click on the grey arrow next to “Master Document.”



Submitting Revised Documents to ASBA for Publication from the *My Documents* Queue

1. Select the **Editor Menu** (pencil icon).
2. Select **Review** from the dropdown menu.
3. Select **Create**.



Then complete the following steps:

Step 1 – Changes to Submit for Review

Select the documents you would like to send for publication, then select *Continue* (top left).

Step 2 – Notes

Enter notes for each document (make sure to include the adoption date for policies and approval date for regulations and exhibits) and select *Continue*.

Step 3 – Confirm

Review the information and select *Submit for Review* (top left).

Creating New District-specific Regulations and Exhibits

1. Click on the document in your Table of Contents that is closest to the one you are adding (e.g., if you are adding a new regulation, AA-R, you would select Policy AA in the TOC). Right-click on that document closest to where the new document should be added, and choose *Add Document Above* or *Add Document Below* (e.g., to place new AA-R, you would choose *Add Document Below* so it will be placed below Policy AA). Enter your content into the editing window. Then in the Metadata section below the editing window, enter the Code and Title using the document code (e.g., AA-R). Note: regulations and exhibits should use the document code in the Title field rather than the full policy title. Select the box next to *Enable Document?* and *Show in TOC?* and enter the **Adoption Date** (approval date), select *Save* in the top navigation bar, enter a **Note** (e.g., Superintendent approved new regulation on 5/1/26), select *Save* again, and **refresh** (this is an important step!). The document is now ready to submit for publication.



Placed a Document Incorrectly in Your TOC?

If you placed a document in the wrong place in your Table of Contents, right-click on the document and select *Move Document*. A pop-up window of your manual will appear; select the document that is closest to where the document needs to go, and then select *Before* or *After* to correctly place the document in your TOC. You can also let our Policy Services Team know and we will place it for you.

Color-coding Information while logged in:

Document Types

- ☐    Document In Review
- ☐   Draft Document
- ☐   Public Document
- ☐   Archived Document
- ☐   Removed Document
- ☐    Document Not Shown in Toc
- ☐    Document Is Disabled
- ☐    Folder Is Disabled

*If you need ASBA to process any of the documents on your behalf,
please just let us know. We are always happy to help!*



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