

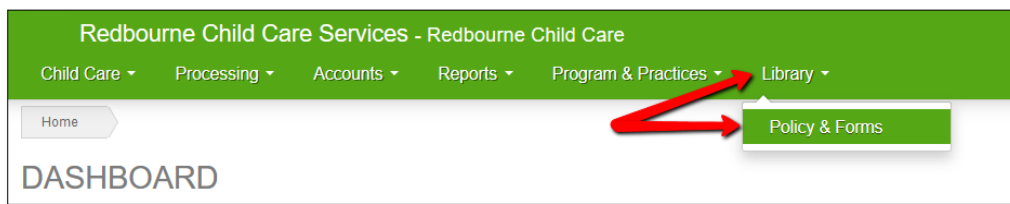
Policies, Handbooks and Forms

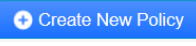
Service Policies, Handbooks and other forms may be uploaded and stored within your software.

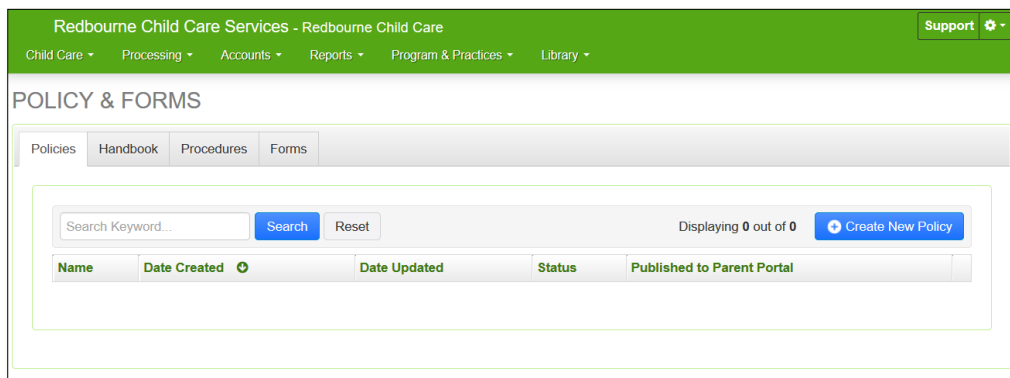
You may then publish Service Policies and a Parent Handbook to the Parent Portal for families to view.

Policies

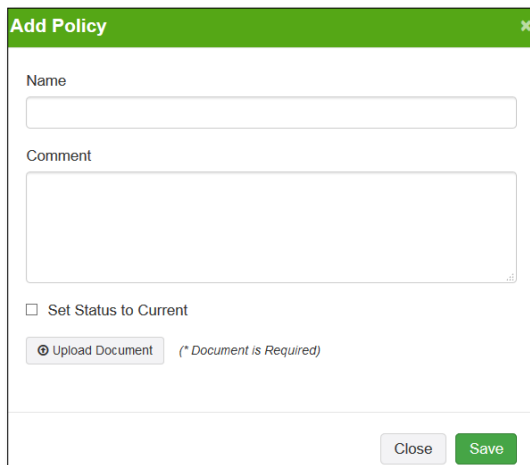
To upload a Policy, navigate to 'Library' and select 'Policy & Forms':



Click the  button:

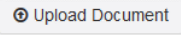



The 'Add Policy' window will open:

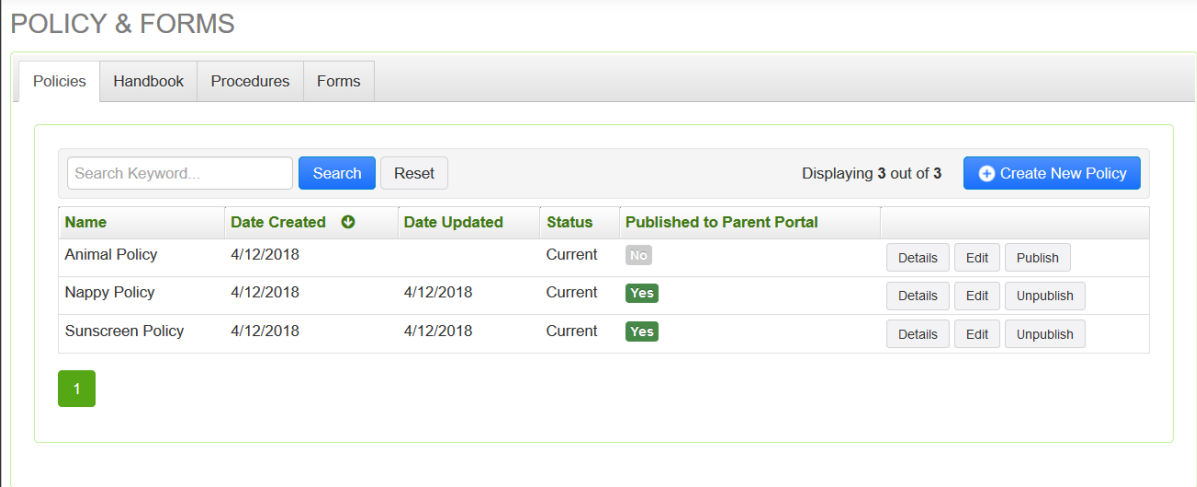


Give the policy a name. You may also choose to enter a comment (optional).

Tick the box 'Set Status to Current'.

Click the  button and select the policy file to upload.


Click the  button and the policy will be stored:




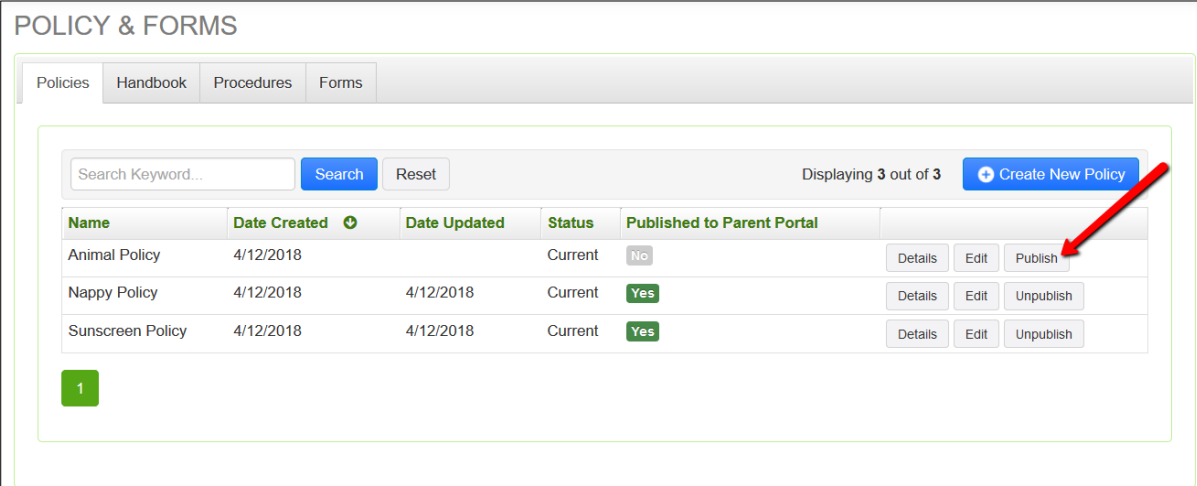
POLICY & FORMS

Policies Handbook Procedures Forms

Search Keyword... Displaying 3 out of 3

Name	Date Created 	Date Updated	Status	Published to Parent Portal	
Animal Policy	4/12/2018		Current	<input type="button" value="No"/>	<input type="button" value="Details"/> <input type="button" value="Edit"/> <input type="button" value="Publish"/>
Nappy Policy	4/12/2018	4/12/2018	Current	<input type="button" value="Yes"/>	<input type="button" value="Details"/> <input type="button" value="Edit"/> <input type="button" value="Unpublish"/>
Sunscreen Policy	4/12/2018	4/12/2018	Current	<input type="button" value="Yes"/>	<input type="button" value="Details"/> <input type="button" value="Edit"/> <input type="button" value="Unpublish"/>


Once saved, you may choose to publish the policy to the Parent Portal. Simply locate the policy in the list, and click the  button:



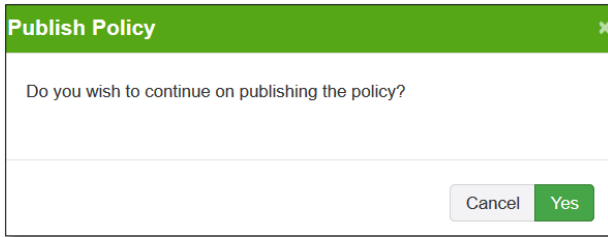
POLICY & FORMS

Policies Handbook Procedures Forms

Search Keyword... Displaying 3 out of 3

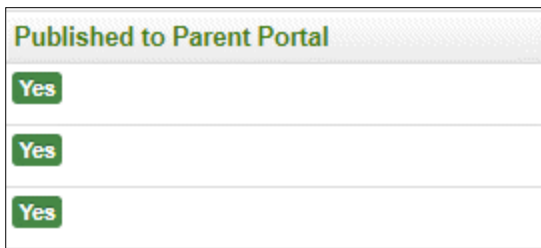
Name	Date Created 	Date Updated	Status	Published to Parent Portal	
Animal Policy	4/12/2018		Current	<input type="button" value="No"/>	<input type="button" value="Details"/> <input type="button" value="Edit"/> <input type="button" value="Publish"/>
Nappy Policy	4/12/2018	4/12/2018	Current	<input type="button" value="Yes"/>	<input type="button" value="Details"/> <input type="button" value="Edit"/> <input type="button" value="Unpublish"/>
Sunscreen Policy	4/12/2018	4/12/2018	Current	<input type="button" value="Yes"/>	<input type="button" value="Details"/> <input type="button" value="Edit"/> <input type="button" value="Unpublish"/>

A validation message will display on screen:




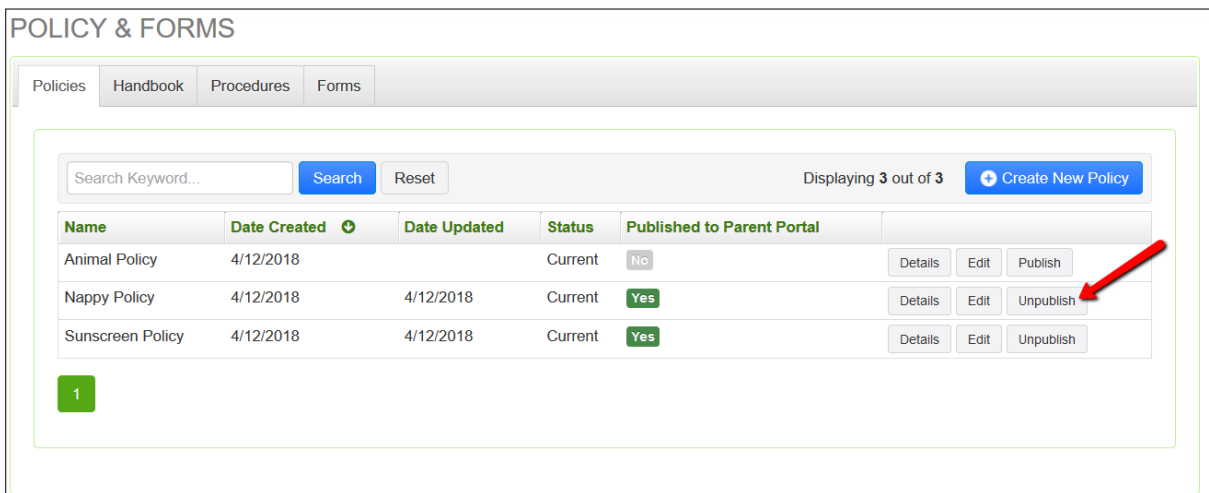
Select 'Yes' and the policy will be published to the Parent Portal.

To confirm if a policy has successfully processed, look for the 'Published to Parent Portal' column:



Policies which have been published will display as 'Yes'.

To unpublish a Policy, click the  button:



The Policy will no longer display within the Parent Portal.

To upload a new version of the Policy, click the **Edit** button:

POLICY & FORMS

Policies Handbook Procedures Forms

Search Keyword... **Search** **Reset** Displaying 3 out of 3 **Create New Policy**

Name	Date Created	Date Updated	Status	Published to Parent Portal	
Animal Policy	4/12/2018		Current	No	Details Edit Publish
Nappy Policy	4/12/2018	4/12/2018	Current	Yes	Details Edit Unpublish
Sunscreen Policy	4/12/2018	4/12/2018	Current	Yes	Details Edit Unpublish

1

Click the **Upload New** button:

Edit Policy

Name
Nappy Policy

Status
Current

Comment

Documents **Upload New**

Filename	Size	Date Uploaded	
Policy.pdf	138KB	4/12/2018	Current

Close **Save**

Select the file to upload and click the **Finish** button.

The latest version will become the 'Current' version. The Current version is the version which will display in the Parent Portal.

Edit Policy

Name
Nappy Policy

Status
Current

Comment

Documents Upload New

Filename	Size	Date Uploaded	
Policy.pdf	138KB	4/12/2018	Current
POlicy.pdf	138KB	4/12/2018	

Close Save

To view further details regarding the Policy, click the Details button:

POLICY & FORMS

Policies Handbook Procedures Forms

Search Keyword... Search Reset Displaying 3 out of 3 + Create New Policy

Name	Date Created	Date Updated	Status	Published to Parent Portal	
Animal Policy	4/12/2018		Current	No	Details Edit Unpublish
Nappy Policy	4/12/2018	4/12/2018	Current	Yes	Details Edit Unpublish
Sunscreen Policy	4/12/2018	4/12/2018	Current	Yes	Details Edit Unpublish

1

This will open the 'Policy Details' window:

Policy Details

Name: Nappy Policy Date Updated: 4/12/2018
 Created By: kmoyer Status: Current
 Date Created: 4/12/2018 Published: Yes
 Updated By: kmoyer

Comment:
No comment added.

Documents:

Filename	Size	Date Uploaded	
Policy.pdf	138KB	4/12/2018	Current
POlicy.pdf	138KB	4/12/2018	

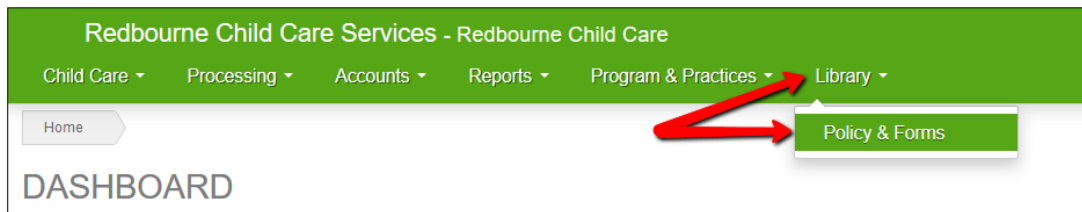
Close

Handbooks

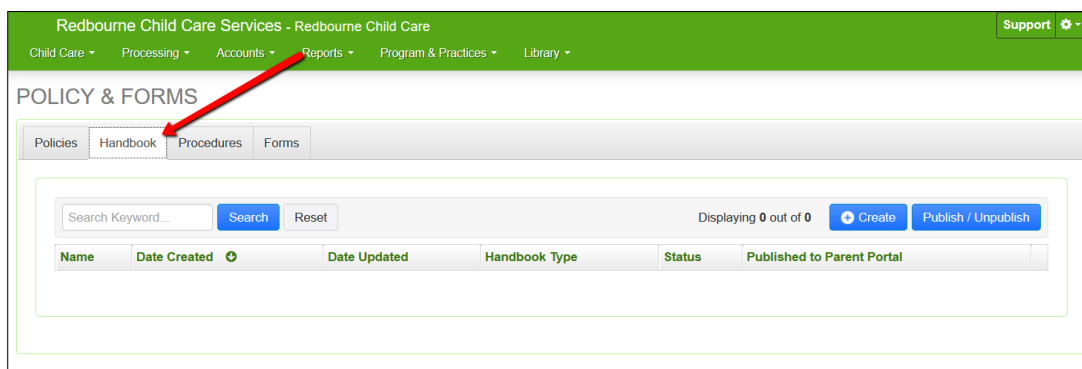
Both Staff and Parent Handbooks may be uploaded and stored within Harmony Web.

Parent Handbooks may also be published to the Parent Portal.

To upload a handbook, navigate to 'Library' and select 'Policy & Forms':



Open the 'Handbook' tab:



Click the  button.

Give the Handbook a name and select the Handbook type. You may also enter a comment (optional).

Tick the box 'Set Status to Current'. Click the 'Upload Document' button and select the Handbook file to upload.

Add Handbook ✕

Name

Handbook Type

Comment

Set Status to Current

(* Document is Required)

policy2.pdf (294.9990234375 KB)

Click the 'Save' button and the Handbook will be stored:

POLICY & FORMS

Policies Handbook Procedures Forms

Displaying 1 out of 1

Name	Date Created	Date Updated	Handbook Type	Status	Published to Parent Portal	
Parent/Guardian Handbook	5/12/2018		Parent	Current	No	<input type="button" value="Details"/> <input type="button" value="Edit"/>

1

To publish a Parent handbook to the Parent Portal, click the button:

POLICY & FORMS

Policies Handbook Procedures Forms

Displaying 1 out of 1

Name	Date Created	Date Updated	Handbook Type	Status	Published to Parent Portal	
Parent/Guardian Handbook	5/12/2018		Parent	Current	No	<input type="button" value="Details"/> <input type="button" value="Edit"/>

1

Select the version you wish to publish from the dropdown menu and click the button:

Publish / Unpublish Parent Handbook ✕

Currently published Parent Handbook: *None*

Select a Parent Handbook to publish:

Parent/Guardian Handbook
▼

Close
Save

The 'Published to Parent Portal' column will now display as 'Yes':

POLICY & FORMS

Policies Handbook Procedures Forms

Search
Reset
Displaying 1 out of 1
+ Create
Publish / Unpublish

Name	Date Created	Date Updated	Handbook Type	Status	Published to Parent Portal	
Parent/Guardian Handbook	5/12/2018	5/12/2018	Parent	Current	Yes	Details Edit

1

To upload a new version of the handbook, click the Edit button:

POLICY & FORMS

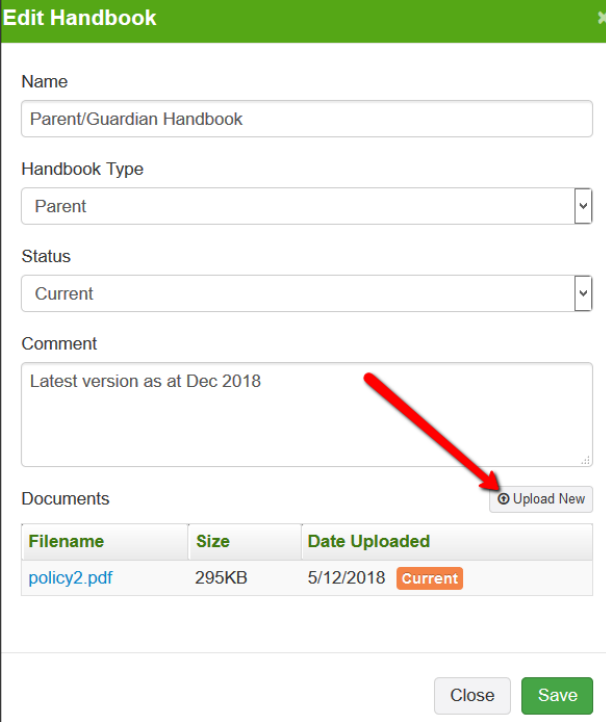
Policies Handbook Procedures Forms

Search
Reset
Displaying 1 out of 1
+ Create
Publish / Unpublish

Name	Date Created	Date Updated	Handbook Type	Status	Published to Parent Portal	
Parent/Guardian Handbook	5/12/2018	5/12/2018	Parent	Current	Yes	Details Edit

1

Click the Upload New button:



Edit Handbook

Name
Parent/Guardian Handbook

Handbook Type
Parent

Status
Current

Comment
Latest version as at Dec 2018

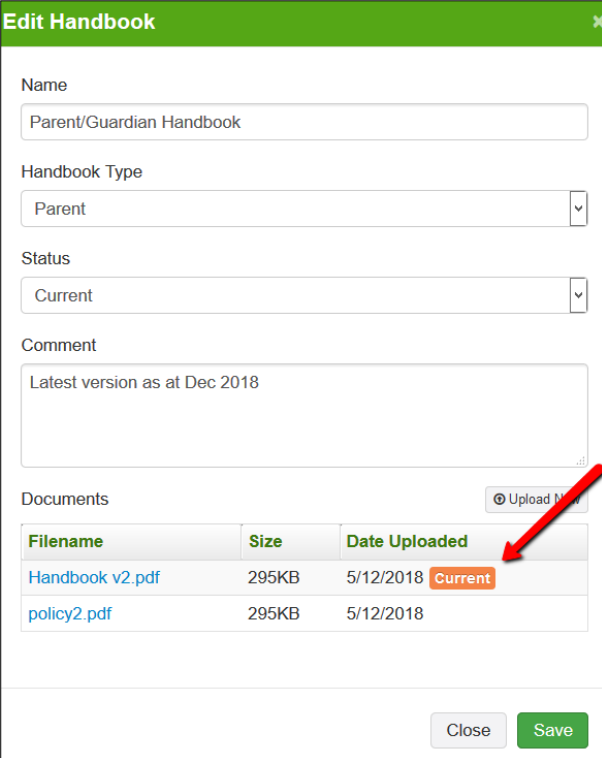
Documents Upload New

Filename	Size	Date Uploaded	
policy2.pdf	295KB	5/12/2018	Current

Close Save

Select the file to upload and click the Finish button.

The latest version will become the 'Current' version. The Current version is the version which will display in the Parent Portal.



Edit Handbook

Name
Parent/Guardian Handbook

Handbook Type
Parent

Status
Current

Comment
Latest version as at Dec 2018

Documents Upload New

Filename	Size	Date Uploaded	
Handbook v2.pdf	295KB	5/12/2018	Current
policy2.pdf	295KB	5/12/2018	

Close Save

Please note that only a handbook with a type of 'Parent' may be published to the Parent Portal. Staff Handbooks may be uploaded and stored within your software, but may not be published to the Parent Portal.

Procedures and Forms

The 'Procedures' and 'Forms' tab may be used as a document library. This is for storage purposes and may not be published to the Parent Portal.