

# **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':

Redbou	ırne Child Ca	re Services -	Redbourne	Child Care
Child Care -	Processing -	Accounts -	Reports -	Program & Practices - Library -
Home				Policy & Forms
DASHBO	ARD			

Click the Create New Policy button:

	Redbour	ne Child C	are Servi	ices - Re	dbourne (	Child Care			Support 🔅
Chi	ld Care 👻	Processing -	Accoun	ts <del>▼</del> R	eports -	Program & Practices -	Library 👻		
PO	LICY &	FORMS	3						
Po	licies Ha	ndbook Pro	ocedures	Forms					
	Search K	keyword		Search	Reset			Displaying <b>0</b> out of <b>0</b>	Create New Policy
	Name	Date Cre	ated 🕚		Dat	te Updated	Status	Published to Parent Portal	

The 'Add Policy' window will open:

Name		
Comment		
Set Status to Current	nt	
<ul> <li>Upload Document</li> </ul>	(* Document is Required)	





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

Tick the box 'Set Status to Current'.

Click the <sup>Oupload Document</sup>' button and select the policy file to upload.

Click the stored:

Handbook	Procedures Forms						
Search Keyword	Search	Reset		Displayir	ng 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							

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

Search Keyword	Search	Reset		Displayi	ing <b>3</b> out of <b>3</b>	¢	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

A validation message will display on screen:





Publish Policy		×
Do you wish to continue on publishing the policy?		
	Cancel	Yes

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:

Published to Parent Portal	
Yes	
Yes	
Yes	

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

To unpublish a Policy, click the Unpublish button:

Search Keyword     Search     Reset     Displaying 3 out of 3     Create New       Name     Date Created     Date Updated     Status     Published to Parent Portal       Animal Policy     4/12/2018     Current     No     Details     Edit     Published       Nappy Policy     4/12/2018     Current     Yes     Details     Edit     Unpublish			UIIIS					
Name     Date Created     O     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	Search Keyword	. Se	earch Reset		Displa	ving 3 out of 3	•	Create New Policy
Animal Policy     4/12/2018     Current     No     Details     Edit     Publish       Nappy Policy     4/12/2018     4/12/2018     Current     Yes     Details     Edit     Unpublish	ime	Date Created	Date Update	ated Status	Published to Parent Portal			
Nappy Policy 4/12/2018 4/12/2018 Current Yes Details Edit Unpublish	imal Policy	4/12/2018		Current	No	Details	Edit	Publish
	appy 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	inscreen Policy	4/12/2018	4/12/2018	Current	Yes	Details	Edit	Unpublish

The Policy will no longer display within the Parent Portal.





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

Search Keyword.	Search	Reset		Displayi	ng 3 out of 3	Create New Policy
Name	Date Created O	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
Sunscreen Policy	4/12/2018	4/12/2018	Current	Yes	Details	Edit Unpublish

Click the <sup>OUpload New</sup> button:

Name			
Nappy Policy			
Status			
Current			~
Comment			
		•	
Documents		Upload	New
	Size	Date Uploaded	
Filename			
Filename POlicy.pdf	138KB	4/12/2018 Current	
Filename POlicy.pdf	138KB	4/12/2018 Current	
Filename POlicy.pdf	138KB	4/12/2018 Current	

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.





Name			
Nappy Policy			
Status			
Current			4
Comment			
Documents			Upload New
Filename	Size	Date Uploaded	
Policy.pdf	138KB	4/12/2018 Current	
POlicy.pdf	138KB	4/12/2018	

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

Search Keyword.	. Search	Reset		Displayi	ng 3 out of 3	🕒 C	reate New Policy
Name	Date Created	Date Updated	Status	Published to Parent Portal			
Animal Policy	4/12/2018		Current	No	Details	Edit	oolish
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

This will open the 'Policy Details' window:

ame: Nappy Pe reated By: kmc	olicy	Date Updated: 4/12/2018 Status: Current
Date Created: 4/12/2018		Published: Yes
Jpdated By: km	oyer	
lo comment addec	1.	
Documents:		
Documents: Filename	Size	Date Uploaded
Documents: Filename Policy.pdf	Size 138KB	Date Uploaded 4/12/2018 Current
Documents: Filename Policy.pdf POlicy.pdf	<b>Size</b> 138KB 138KB	Date Uploaded           4/12/2018         Current           4/12/2018         Current
Documents: Filename Policy.pdf POlicy.pdf	<b>Size</b> 138KB 138KB	Date Uploaded           4/12/2018         Current           4/12/2018         Current
Documents: Filename Policy.pdf POlicy.pdf	Size 138KB 138KB	Date Uploaded           4/12/2018         Current           4/12/2018         Current





#### **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':

Redbou	ırne Child Caı	re Services -	Redbourne	Child Care
Child Care -	Processing -	Accounts -	Reports -	Program & Practices
Home				Policy & Forms
DASHBO	ARD			

## Open the 'Handbook' tab:

	rne Child Car	e Services - Red	Ibourne Child Care	ootieee – Likrony –				Support	¢-
	Processing *	Accounts	ports • Program & Pra	actices • Library •					
POLICY &	FORMS								
Policies Ha	ndbook Proce	edures Forms							
Search H	Keyword	Search Res	et		Display	ing <b>0</b> out of <b>0</b>	• Create	Publish / Unpublish	
Name	Date Created	d O	Date Updated	Handbook Type	Status	Published to P	arent Portal		

Click the Create 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.





dd Handbook	
Name	
Parent/Guardian Handbook	
Handbook Type	
Parent	~
Comment	
Latest version as at Dec 2018	
Set Status to Current	
Upload Document     (* Document is Required)	
policy2.pdf (294.9990234375 KB)	
	Close Save

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

162	Handbook	Procedures	Forms						
Sea	rch Keyword	Sea	rch Reset				E	Displaying 1 out of 1 • Create	Publish / Unpublish
Name	•		Date Created	🙂 Da	te Updated	Handbook Type	Status	Published to Parent Portal	
Parer	nt/Guardian Ha	andbook	5/12/2018			Parent	Current	No	Details Edit
1									

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

ies Handbook F	Procedures	Forms					
Search Keyword	Sear	Reset			ſ	Displaying 1 out of 1 • Create	Publish / Unpublish
Name		Date Created	Date Updated	Handbook Type	Status	Published to Parent Portal	
Parent/Guardian Hand	lbook	5/12/2018		Parent	Current	No	Details Edit
1							

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





Publish / Unpublish Parent Handbook	×
Currently published Parent Handbook: <i>None</i> Select a Parent Handbook to publish: Parent/Guardian Handbook	
	Close Save

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

Sear	Denet					
	Reset			, I	Displaying 1 out of 1 🛛 🕂 Create	Publish / Unpublish
	Date Created O	Date Updated	Handbook Type	Status	Published to Parent Portal	
dbook	5/12/2018	5/12/2018	Parent	Current	Yes	Details Edit
	dbook	Date Created         Image: Organization           dbook         5/12/2018	Date Created         Date Updated           dbook         5/12/2018         5/12/2018	Date Created         Date Updated         Handbook Type           dbook         5/12/2018         5/12/2018         Parent	Date Created         O         Date Updated         Handbook Type         Status           dbook         5/12/2018         5/12/2018         Parent         Current	Date Created         O         Date Updated         Handbook Type         Status         Published to Parent Portal           dbook         5/12/2018         5/12/2018         Parent         Current         Yes

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

Search Keyword	earch Reset			[	Displaying 1 out of 1	Publish / Unpublish
Name	Date Created O	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 <sup>O Upload New</sup> button:





dit Handbook	(	
Name		
Parent/Guardiar	Handbook	
Handbook Type		
Parent		$\checkmark$
Status		
Current		~
Comment		
Latest version a	s at Dec 2018	
Documents		O 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.

dit Handbook			;
Name			
Parent/Guardian Hand	lbook		
Handbook Type			
Parent			~
Status			
Current			~
Comment			
Latest version as at De	ec 2018		
Documents	7	Uploa	d
Filename	Size	Date Uploaded	
Handbook v2.pdf	295KB	5/12/2018 Current	
policy2.pdf	295KB	5/12/2018	
		Close	ave





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.

