

March 22, 2022

GUIDANCE TO GET THE MOST OUT OF THE ONLINE POLICY SERVICE UPGRADE.

Want to know what the benefits of the upgrade are and how to implement them?

Here's some information to guide you.

For more guidance check out our [website](#).

KEY FEATURES

Administrator roles will now be able to go to a Dashboard. What shows on the Dashboard will depend on the type of subscription you have. But with all Dashboards, Administrators will be able to:

- set up and manage users
- see what policies are being frequently used in the organisation
- change the policy statements for each of their policies
- change and update their logo and branding on policies.
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If your subscription allows it – Administrators will be able to enhance, edit, change and download policies as well as add new policy pages and categories.

See here for more information about these options. See below for guidance on what to do with the options.

MEMBERS WITH THE ESSENTIALS SUBSCRIPTION

Dashboard

Left hand of your Dashboard will show:

- View Policies
- Policy management
- Settings.

On right hand side of Dashboard you will start to see a list of most viewed policies. After a certain amount of views, a graph will appear indicating policy usage.

You can use these indicators of use to help your organisational monitoring and planning processes and to promote and encourage use of policies by your team.

Use of Te Reo Māori on personal Dashboard.

If you want kupu Māori to be used on Dashboard, go to settings and language and choose Māori.

Set up users.

Go to Manage Users on left hand dashboard.

Add User – Enter the new user details. New User will be sent an email and invited to set up password.

Platform Setting

From here you can enter and review your organisation's details.

You can reset your brand colours for titles and headings of your policy pages, your logo, login image and policy header image.

Policy Management

This lists all the policies your organisation has been set up with.

For each policy, there are Details and Sections tabs.

Details show you any policy statements that apply to the policy you are looking at:

- The first policy statement reflects the client outcome or experience the policy is aimed at.
- The second policy statement is a whakatauki or other relevant proverb that relates to the aims or essence of the policy.
- The third policy statement provides a translation or attribution for the whakatauki/proverb, when known.

You can change these statements by entering your new statements in the Custom Statement part of the Details Page. Your change will take effect in the Policy View – so will be seen by those looking at your policies.

Sections -with the Essentials Package, the Sections Tab (beside Details) will just show you the sections of your policy.

CUSTOMISING YOUR POLICIES

Enhance Option

If your agency has an Enhance Subscription, in the Sections Tab you will see you have the option to Add paragraphs.

You can do this by clicking on Add paragraph below. You will see an editing box come up. Enter your text. Click save. You can check out how your new paragraph looks by going to View policies on left hand side of the Dashboard. If you want to make further changes, go back to your Dashboard.

You can return to the Dashboard from View Policy screen by going to your profile icon on the right hand side of the View policy screen, clicking on it and clicking on Dashboard.

Go back to the policy you were working on. You can make further changes to your new paragraph by clicking Edit or you can delete it.

Note that your agency is responsible for reviewing and updating the additional paragraph.

Edit Option

If your agency has an Edit Subscription, in the Sections Tab you will see you have the option to Add paragraphs and edit core policy text. See process above to add new paragraphs.

To edit existing policy content, go to the policy and paragraph you want to change and click on Customise. This will open the paragraph you want to edit. Make the changes you want then Save. Go to View Policies to check out the change you have made.

If you want to change another paragraph or correct something you've written, repeat the above steps.

Download Policies

If your subscription includes the option of Downloading your policies . A Word icon will show on the righthand side of view policy screen. Click the icon if you want to download the policy you are viewing. If you want to download all your policies, click on Download policies, which is at the bottom of the policy menu in View Policies.

Expand your policy set with new policy pages.

If you have an Expand or Kit and Caboodle subscription, this means you can draft up your own policy pages to add to those we set you up with and either include them within an existing category or create a new category.

To create a new page

Go to Policy Management on the lefthand side of your Dashboard and to Policies.

Click on the option to Add new policy.

Enter the policy title and any policy statements you want to use. You can then choose a category. Click save. If you want to put it under a category that is not in the list, you will need to add a new category (below).

Adding new categories for new policies.

If you want to create new policies and think they need their own separate category go to Categories on lefthand side of Dashboard. Enter your new category.

Think about where you want your category of policies to sit in the list of policy categories on the lefthand side of the policy menu. If you want the new category to show at the top of the menu, then put number 1 in the position. If you want them somewhere else, insert the number that reflects where they would come in the order of the categories that show on the menu.

Feedback

There's going to be a period of adjustment for us all as we get used to the new system. We have developed the system improvements to address what people have asked for and more generally, to improve your experience with your online policies.

Any feedback on the system would be much appreciated as you start to use it so we can keep on improving.

Ngā mihi nui

Kendra