



Policy, Administrative Procedure, Protocol, Form and Memo Management

#400.20

Adopted:	February 1, 2021
Last Reviewed/Revised:	N/A
Responsibility:	Superintendent of Business
Next Scheduled Review:	2025-2026

Purpose

Proposals for new, or amendments to, Brant Haldimand Norfolk Catholic District School Board (the “Board” or BHNCD SB) policies, administrative procedures, department protocols, forms or the issuance of memos must follow a standard process in order to:

- Ensure consistency in format and use.
- Eliminate conflicting, duplicate, and obsolete forms, administrative procedures, protocols, and memos.
- Provide online access to forms, administrative procedures, protocols, and memos thereby reducing paper copies and taking advantage of electronic storage, retention, and retrieval.

Application and Scope

This Administrative Procedure applies to all policies, administrative procedures, protocols, forms, and memos across all departments and schools.

References

- BNHCDSB Visual Identity and Style Guidelines (currently being updated)

Forms

- [OPS 400.20.F01 – Board Policy and Administrative Procedure Template](#)
- [OPS 400.20.F02 – Administrative Procedure Template](#)
- [OPS 400.20.F03 – Administrative Procedure or Form Checklist](#)
- [OPS 400.20.F04 – Department Protocol Template](#)
- [OPS 400.20.F05 – Form Template \(Word – Portrait\)](#)
- [OPS 400.20.F06 – Appendix Template](#)
- [OPS 400.20.F07 – Form Template \(Excel\)](#)
- [OPS 400.20.F08 – Form Template \(Word – Landscape\)](#)

Appendices

- OPS 400.20.XA – Administrative Procedures and Forms Detailed Process
- OPS 400.20.XB – Standard Forms Detailed Process
- OPS 400.20.XC – File Naming Conventions



Definitions

Policy: a statement or position adopted by the Board that provides the framework for a course of action. It is a commitment by which the Board is held accountable to its public. Adoption of new Board policies or revision of existing policies is solely the responsibility of the Board of Trustees.

Administrative Procedure: is a course of action developed to implement and support an approved Board policy. Most administrative procedures will be available to the public. Administrative procedures that have a confidentiality or a health and safety component will not be posted on the Board website.

Protocol: a set of standard statements that explain a process and expectations that guide staff and the process. Protocols aim to ensure that all staff consistently understand and execute the process.

Form: a printed or electronic document with a minimum of one blank field where information will be inserted by the person completing the form, even if only a signature line. Each form is assigned an owner and permanent number.

Appendix: a section, table, list, graphic or other supplementary information pertinent to the associated Administrative Procedures Memorandum, but not included in the main body of the document. Examples include spreadsheets, flow charts, bibliographies, contact lists, etc.

Memo: is used for internal communications regarding procedures, notifications, or announcements within the Board. Memos are usually meant as a mass communication to many or all members of the Board.

Administrative Procedures

Important

Current versions of all policies, administrative procedures, protocols, forms, memos, and standard templates are posted on BHNHub. Do not print and/or save any of these files for repeated use from BHNHub to another location. The only way to guarantee that you are using a current version is to access it directly from BHNHub.

All other saved versions are null and void; please delete them.

Board Policies

Adoption of new Board policies or revision of existing policies is solely the responsibility of the Board of Trustees as outlined in the Board's by-laws:

- Policies and Procedures are to be reviewed on a four-year schedule.
- When a bylaw, policy or procedure is scheduled to be reviewed it will be presented to Executive Council as information.
- After Executive Council, a policy or procedure shall be circulated to all stakeholders for a minimum of 60 days, for input with respect to revision.
- Revised Bylaws are not circulated to stakeholders but brought directly to policy committee for review, then the appropriate committee of the whole and board meeting for review and approval.
- For policies and procedures, at the end of the circulation period the superintendent responsible for the policy or procedure will make any revisions as deemed necessary, then bring a report noting any changes to the first available Policy Committee meeting.
- After the Policy Committee meeting the superintendent responsible for the policy or procedure will make any revisions as requested then bring a report to the first available committee of the whole for discussion, then approval at the Board meeting.



- All revised Bylaws, Policies and Procedures will be posted on the Board's website. Policies and Procedures are also available on BHNHub.

Standalone administrative procedures (i.e. they do not have a policy attached) are not required to go through the above process, rather require Senior Administration approval.

Administrative Procedures

Creating, Amending, or Combining

Note: In this section, reference to an administrative procedure also includes all associated forms and/or appendices.

When creating, amending, or combining administrative procedures, the reviewer will:

1. Obtain appropriate Superintendent direction or approval for the creation/amendment.
2. Contact the Executive Assistant to the Director, who will process the request. Permanent numbers will be assigned to all policies, administrative procedures, forms, and appendices. If you are editing an existing policy, the Executive Assistant to the Director will provide you with an official copy of the current version on which to make your edits. Do not edit any other versions that may be stored elsewhere.
3. Practice due diligence as to overlapping or related policies or documents by considering the content and determining if a separate document needs to be created or if the information can be combined with an existing policy.
4. Ensure that titles are descriptive so that individuals can quickly and easily locate the policy, administrative procedure, form, or appendix.
5. Create, amend, or combine the administrative procedure, using the current administrative procedure template (OPS 400.20.F02). Where applicable, use the relevant form and/or appendix templates (listed in the Forms section above) and submit all files to the appropriate Superintendent for initial review.
6. Request final Senior Administration approval of the new or amended administrative procedure.
7. Arrange for the appropriate announcement of the administrative procedure. This is completed by the Director or Superintendent responsible for administrative procedure.
8. The administrative procedure will be posted on the Board's policy website, BHNHub, and saved into the electronic data management system for permanent retention. To ensure version accuracy, all other copies are to be deleted.

Retiring

The reviewer of the administrative procedure will determine if retirement is warranted and if so, Senior Administration will grant approval. The administrative procedure, form, and/or appendix will be removed from the Board's Policy website and BHNHub, the number(s) will be retired, and the file(s) will be stored in the electronic archives.

Department Protocols

Creating, Amending, or Combining

When creating, amending, or combining protocols, the reviewer will:

1. Obtain appropriate Manager or Superintendent direction or approval for the creation/amendment.



2. Contact the appropriate Manager or Superintendent, who will process the request. If you are editing an existing protocol, the appropriate Manager will provide you with an official copy of the current version on which to make your edits. Do not edit any other versions that may be stored elsewhere.
3. Practice due diligence as to overlapping or related protocols or documents by considering the content and determining if a separate document needs to be created or if the information can be combined with an existing protocol or administrative procedure.
4. Ensure that titles are descriptive so that individuals can quickly and easily locate the protocol, form, or appendix.
5. Create, amend or combine the protocol, using the current protocol template (OPS 400.20.F04). Where applicable, use the relevant form and/or appendix templates (listed in the Forms section above) and submit all files to the appropriate Manager or Superintendent for initial review.
6. Request final Superintendent approval of the new or amended protocol.
7. Arrange for the appropriate announcement of the protocol. This is completed by the Superintendent of Manager responsible for protocol.
8. The protocol will be posted on BHNHub and saved into the electronic data management system for permanent retention. To ensure version accuracy, all other copies are to be deleted.

Retiring

The reviewer of the protocol will determine if retirement is warranted and if so, the appropriate Superintendent will grant approval. The protocol, form, and/or appendix will be removed from BHNHub, the file(s) will be stored in the electronic archives.

Standard Forms

Creating, Amending, or Combining

Note: In this section, reference to a form does not include those associated with a policy, administrative procedure, or protocol.

When creating, amending, or combining standard forms, the reviewer will:

1. Obtain process owner approval (Superintendent or Manager) for the creation/edit.
2. Practice due diligence as to duplication of forms by determining if the information can be added to an existing form. If the creation or edit of the form impacts any administrative procedure, it will be necessary to update the associated administrative procedure.
3. Contact the Executive Assistant to the Director to obtain an authorized form number and determine an effective form title.
4. Create or amend the form, using the appropriate current Form Template. Form templates are listed in the Forms section above.
5. Submit all forms to the appropriate Superintendent for initial review.
6. Request final Senior Administration approval of the new or amended form.
7. Submit the final version in Word and fillable PDF formats to the Executive Assistant to the Director who will post the form on BHNHub and save a copy into the electronic data management system.
8. Arrange for the appropriate announcement regarding the use of the form. This is completed by the Superintendent or Manager responsible for standard form.

Retiring



The reviewer of the form will contact the Executive Assistant to the Director regarding form removal. The form will be removed from BHNHub, the number(s) will be retired, and the form(s) will be stored in the electronic archives.

BHNHub

The Board's intranet is a private network only accessible to current staff and provides one central place to access important information, internal and external links or resources, applications, and forms. BHN Hub streamlines everyday activities and provides a quick and easy way to access the internal information you need for your role. If it is on BHNHub it is current and updated, no need to download or store copies on local drives, team or school sites, or desktops.

Superintendents, department Managers, or their delegates are responsible for updating and maintaining current content on BHNHub. This is **not** the responsibility of the Information Technology Services department.

BHNHub is the location for board-wide documents to be viewed and accessed:

- Board Policies, Administrative Procedures, and Department Protocols.
- Memos issued from the Director, Superintendents, and Managers.
- Current, approved forms for everyday use.

As part of the ongoing administration of documents on BHNHub the following fields (or meta tags) are required to assist with the organization and search functionality within BHNHub:

- Department – refer to Appendix D (OPS 400.20.AD) for a listing of the departments.
- Document Type – Policy, Administrative Procedure, Protocol, Form, Memo, Appendix.
- Issuance Date – Date of issuance or applicability.
- Category – refers to a secondary grouping of documents, such as registration, hiring, or insurance.
- Key Search Terms – Tags or terms to assist with search functionality.

Communication

Superintendents, department Managers, or their delegates are responsible for communicating and posting new or revised policies, APs, or standard forms. This is **not** the responsibility of Communication Services.

Communication of new or revised policies, administrative procedures, or standard forms is vital to ensure all staff are aware of any changes. Communication would likely occur through one of, or a combination of, the following channels: email, announcement through BHNHub, or message on the respective department page in BHNHub. Regardless of the method of communication, all messages must direct staff (through links) to the new or revised policy, AP, or standard forms; copies should not be attached to the communication.

Please also refer to the Administrative Procedure (OPS 400.20.XB) and Standards Forms (OPS 400.20.XC) Detailed Process.



Administrative Procedures (AP) Detailed Process

- This detailed process includes all associated forms and appendices to the AP being created or edited.

Legend

- E.A.D.:** Executive Assistant to the Director
- E.A.B.S.:** Executive Assistant to Business Services
- S.S.O.E.:** Secretary to the Superintendent of Education
- SAM:** Senior Administration

Definitions

- Process Owner:** Superintendent or Manager (or delegates) responsible and accountable for the administrative procedure and forms, including analyzing its content.

	Task	Responsibility	Details	AP		Forms	
				New	Edit	New	Edit
1.	Obtain approval	Process Owner	<ul style="list-style-type: none"> APs and associated forms are reviewed at least once every four years. Superintendents will notify Process Owner. If creating or editing an AP outside of the review cycle, you must get Superintendent approval. 	✓	✓	✓	✓
2.	Contact the E.A.D.	Process Owner	<ul style="list-style-type: none"> For new AP, you will need a new AP number. For existing AP, you will need a copy of the most recent version of all files. 	✓	✓		✓
3.	Assign a new AP number	E.A.D.	<ul style="list-style-type: none"> Issue a new AP number. Remind Process Owner to use updated templates. 	✓		✓	
4.	Provide copy of current files	E.A.D.	<ul style="list-style-type: none"> Provide copy of latest files that are stored in the electronic management system. Remind Process Owner to use updated templates. 		✓		✓



	Task	Responsibility	Details	AP		Forms	
				New	Edit	New	Edit
5.	Practice Due Diligence	Process Owner	<ul style="list-style-type: none"> Does the content already exist elsewhere? Does the new content or edit necessitate changes to another AP? If so, the AP process must also be followed. Should the new document be a part of, or an appendix to, an existing file? Do the planned edits to the existing file now make this document similar to another? If so, reference the original versus creating another. 	✓	✓	✓	✓
6.	Draft the new or edit the current content	Process Owner	<ul style="list-style-type: none"> Plan and draft the content. Consider the design and layout sections for AP and forms. 	✓	✓	✓	✓
7.	Review proposed form titles	Process Owner	<ul style="list-style-type: none"> Form titles must be descriptive for effective storage and retrieval on web pages. 			✓	✓
8.	Complete checklist	Process Owner	<ul style="list-style-type: none"> Complete the process owner section of the AP checklist. 	✓	✓	✓	✓
9.	Type and save documents	Process Owner	<ul style="list-style-type: none"> Formatting and layout must be consistent with the templates provided in OPS 400.20 AP. 	✓	✓	✓	✓
10.	Submit documents and checklist	Process Owner	<ul style="list-style-type: none"> Send all documents, including the checklist, to the appropriate Executive Assistant or Secretary to the Superintendent of Education. 	✓	✓	✓	✓
11.	Examine the files	E.A.D./E.A.B.S. / S.S.O.E.	<p>Verify that:</p> <ul style="list-style-type: none"> Accessibility formatting rules have been followed, in accordance with the Guide to Creating Accessible Documents (OPS 400.20.XA). Correct formatting, styles, template, accessibility standards, naming convention, etc. have been used. 	✓	✓	✓	✓
12.	Complete the checklist	E.A.D./E.A.B.S. / S.S.O.E.	<ul style="list-style-type: none"> Complete the process owner section of the AP checklist 	✓	✓	✓	✓



	Task	Responsibility	Details	AP		Forms	
				New	Edit	New	Edit
13.	Submit documents and checklist	E.A.D./E.A.B.S. / S.S.O.E.	<ul style="list-style-type: none"> Forward all documents, as separate files to the appropriate Superintendent in the following file formats: <ul style="list-style-type: none"> AP: word only (contains draft watermark) Forms: word or excel Appendices: word and PDF Also submit the checklist which now has the process owner and the E.A.D./E.A.B.S./S.S.O.E. sections completed. 	✓	✓	✓	✓
14.	Review the files	Superintendent	<ul style="list-style-type: none"> Appropriate SO reviews the documents for accuracy and completeness of content. 	✓	✓	✓	✓
15.	Complete the checklist	Superintendent	<ul style="list-style-type: none"> Complete the SO section, sign, and date the checklist. 	✓	✓	✓	✓
16.	Submit files	Superintendent	<ul style="list-style-type: none"> Submit all files (including checklist) to E.A.D. for S.A.M. approval. 	✓	✓	✓	✓
17.	Approve or recommend edits	S.A.M.	<ul style="list-style-type: none"> S.A.M. approves or recommends edits to the presented files. 	✓	✓	✓	✓
18.	Edit files (Optional)	E.A.D./E.A.B.S. / S.S.O.E.	<ul style="list-style-type: none"> Type any recommended edits from S.A.M. review. If edits are substantial, further review may be required by S.A.M. Skip this step if no S.A.M. edits were recommended 	✓	✓	✓	✓
19.	Complete final edits	E.A.D./E.A.B.S. / S.S.O.E.	<ul style="list-style-type: none"> After final approval received: <ul style="list-style-type: none"> AP: remove 'Draft' watermark and save in both word and PDF formats. Forms: save all word and excel forms to PDF and make fillable (if not already done). 	✓	✓	✓	✓
20.	Send all files to E.A.D.	E.A.D./E.A.B.S. / S.S.O.E.	<ul style="list-style-type: none"> Send all files (word, excel, PDFs) including checklist to E.A.D. To avoid future conflicting versions, remove files from all other drives or team sites. 	✓	✓	✓	✓



	Task	Responsibility	Details	AP		Forms	
				New	Edit	New	Edit
21.	Review final files	E.A.D.	<ul style="list-style-type: none"> Check for correct formatting, template, styles, accessibility standards, naming convention etc. If changes need to be made, return the file(s) to the Process Owner. 	✓	✓	✓	✓
22.	Save files to electronic management system (E.M.S.)	E.A.D.	<ul style="list-style-type: none"> Save all files, including the checklist, into E.M.S. (Word, Excel, and PDF versions). Files are saved with the applicable naming convention. Archive all previous file versions. Do not keep any versions on other drives or team sites. 	✓	✓	✓	✓
23.	Update the AP database	E.A.D.	<ul style="list-style-type: none"> Update the AP database as required. 	✓	✓	✓	✓
24.	Post to Policy/AP webpage and BHN Hub	E.A.D.	<ul style="list-style-type: none"> Post the AP, forms, appendices (must download files from E.M.S. for PDF to remain fillable). Extend the PDF forms. Upload AP to the appropriate section of the Board's public webpage and BHN Hub <ul style="list-style-type: none"> Ensure upload is only done once to avoid having multiple copies. Forms are uploaded to the Forms section of BHN Hub. 	✓	✓	✓	✓
25.	Determine School Cash implications (Optional)	E.A.D./E.A.B.S. / S.S.O.E.	<ul style="list-style-type: none"> Determine if Parent will complete the form. If yes, notify the Manager of Financial Services (or designate) who will add form to School Cash Online. Skip this step if the AP does not include any forms. 			✓	✓
26.	Notify Superintendent of upload	E.A.D.	<ul style="list-style-type: none"> Notify appropriate Superintendent to advise final documents have been uploaded. Notification should also require confirmation of accuracy. 	✓	✓	✓	✓



	Task	Responsibility	Details	AP		Forms	
				New	Edit	New	Edit
27.	Review of final documents	Superintendent (or designate)	<ul style="list-style-type: none"> Superintendent (or designate) will review posted documents for accuracy. Respond to notification that he posted files are accurate or require edits. Indicate the edits required. 	✓	✓	✓	✓
28.	Initiate staff communication	Superintendent (or designate)	<ul style="list-style-type: none"> Provide communication to all staff announcing a new or revised AP and forms. The communication should also provide an outline of any significant changes or impact to operations. This is not the responsibility of Communication Services. 	✓	✓	✓	✓
29.	File confirmation and communication in E.M.S	E.A.D.	<ul style="list-style-type: none"> The notification and response from the Superintendent along with the staff communication are to be placed in the E.M.S. along with the other files. 	✓	✓	✓	✓



Standard Forms Detailed Process

- This detailed process includes all standalone forms not associated with administrative procedures (AP).

Legend

- E.A.D.:** Executive Assistant to the Director
- E.A.B.S.:** Executive Assistant to Business Services
- S.S.O.E.:** Secretary to the Superintendent of Education
- S.A.M.:** Senior Administration

Definitions

- Process Owner:** Superintendent or Manager (or delegates) responsible and accountable for the standard form, including analyzing its content.

				Forms	
	Task	Responsibility	Details	New	Edit
1.	Obtain approval	Process Owner	<ul style="list-style-type: none"> Forms are reviewed at least once every four years. Superintendents will notify Reviewer. If creating or editing a form outside of the review cycle, you must get Superintendent approval. 	✓	✓
2.	Contact the E.A.D.	Process Owner	<ul style="list-style-type: none"> For new forms, you will need a new form number. For existing forms, you will need a copy of the most recent version. 		✓
3.	Assign a new form number	E.A.D.	<ul style="list-style-type: none"> Issue a new form number. Remind Process Owner to use updated templates. 	✓	
4.	Provide copy of current files	E.A.D.	<ul style="list-style-type: none"> Provide copy of latest files that are stored in the electronic management system. Remind Process Owner to use updated templates. 		✓



				Forms	
	Task	Responsibility	Details	New	Edit
5.	Practice Due Diligence	Process Owner	<ul style="list-style-type: none"> Does the content already exist elsewhere? Does the new content or edit necessitate changes to an AP? If so, the AP process must also be followed. Should the new form be a part of an existing form? Do the planned edits to the existing form now make this document similar to another? If so, reference the original versus creating another. 	✓	✓
6.	Draft the new or edit the current content	Process Owner	<ul style="list-style-type: none"> Plan and draft the content. Consider the design and layout sections for forms. All forms must be fillable PDFs. 	✓	✓
7.	Review proposed form titles	Process Owner	<ul style="list-style-type: none"> Form titles must be descriptive for effective storage and retrieval on web pages. 	✓	✓
8.	Complete checklist	Process Owner	<ul style="list-style-type: none"> Complete the process owner section of the form checklist. 	✓	✓
9.	Type and save documents	Process Owner	<ul style="list-style-type: none"> Formatting and layout must be consistent with the templates provided in OPS 400.20 AP. Forms must be saved with the strict naming conventions (refer to File Naming Conventions for Forms, OPS 400.20.XD). 	✓	✓
10.	Submit documents and checklist	Process Owner	<ul style="list-style-type: none"> Send all forms, including the checklist, to the appropriate Executive Assistant or Secretary to the Superintendent of Education. 	✓	✓
11.	Examine the forms	E.A.D./E.A.B.S. / S.S.O.E.	<p>Verify that:</p> <ul style="list-style-type: none"> Accessibility formatting rules have been followed, in accordance with the Guide to Creating Accessible Documents (OPS 400.20.XA). Correct formatting, styles, template, accessibility standards, naming convention, etc. have been used. 	✓	✓
12.	Extend the forms in PDF	E.A.D./E.A.B.S. / S.S.O.E.	<ul style="list-style-type: none"> If not already done so, extend the PDF version. Test using Google Chrome to see if the extended version works properly. If not, post the unextended version. 	✓	✓



				Forms	
	Task	Responsibility	Details	New	Edit
13.	Complete the checklist	E.A.D./E.A.B.S. / S.S.O.E.	<ul style="list-style-type: none"> Complete the process owner section of the form checklist 	✓	✓
14.	Save forms to electronic management system (E.M.S.)	E.A.D.	<ul style="list-style-type: none"> Save all forms, including the checklist, into E.M.S. (Word, Excel, and PDF versions). Forms are saved with the applicable naming convention. Archive all previous file versions. Do not keep any versions on other drives or team sites. 	✓	✓
15.	Submit documents and checklist	E.A.D./E.A.B.S. / S.S.O.E.	<ul style="list-style-type: none"> Forward all forms, as separate files to the appropriate Superintendent in the following file formats: <ul style="list-style-type: none"> Forms: word, excel, fileable PDF Also submit the checklist which now has the process owner and the E.A.D./E.A.B.S./S.S.O.E. sections completed. 	✓	✓
16.	Review the files	Superintendent	<ul style="list-style-type: none"> Appropriate SO reviews the documents for accuracy and completeness of content. 	✓	✓
17.	Complete the checklist	Superintendent	<ul style="list-style-type: none"> Complete the SO section, sign, and date the checklist. 	✓	✓
18.	Submit files	Superintendent	<ul style="list-style-type: none"> Submit all files (including checklist) to E.A.D. for S.A.M. approval. 	✓	✓
19.	Approve or recommend edits	S.A.M.	<ul style="list-style-type: none"> S.A.M. approves or recommends edits to the presented forms. 	✓	✓
20.	Edit files (Optional)	E.A.D./E.A.B.S. / S.S.O.E.	<ul style="list-style-type: none"> Type any recommended edits from S.A.M. review. If edits are substantial, further review may be required by S.A.M. Skip this step if no S.A.M. edits were recommended 	✓	✓
21.	Complete final edits	E.A.D./E.A.B.S. / S.S.O.E.	<ul style="list-style-type: none"> After final approval received: <ul style="list-style-type: none"> Forms: save all word and excel forms to PDF and make fillable (if not already done). 	✓	✓
22.	Send all files to E.A.D.	E.A.D./E.A.B.S. / S.S.O.E.	<ul style="list-style-type: none"> Send all files (word, excel, PDFs) including checklist to E.A.D.. To avoid future conflicting versions, remove files from all other drives or team sites. 	✓	✓



				Forms	
	Task	Responsibility	Details	New	Edit
23.	Review final files	E.A.D.	<ul style="list-style-type: none"> Check for correct formatting, template, styles, accessibility standards, naming convention etc. If changes need to be made, return the file(s) to the Process Owner. 	✓	✓
24.	Post to Forms section of BHN Hub	E.A.D.	<ul style="list-style-type: none"> Post the forms (must download files from E.M.S. for PDF to remain fillable). Upload to 'Forms' section of BHN Hub. 	✓	✓
25.	Determine School Cash implications (Optional)	E.A.D./E.A.B.S. / S.S.O.E.	<ul style="list-style-type: none"> Determine if Parent will complete the form. If yes, notify the Manager of Financial Services (or designate) who will add form to School Cash Online. Skip this step if the form is not for parents to complete. 	✓	✓
26.	Notify Superintendent of upload	E.A.D.	<ul style="list-style-type: none"> Notify appropriate Superintendent to advise final documents have been uploaded. Notification should also require confirmation of accuracy. 	✓	✓
27.	Review of final forms	Superintendent (or designate)	<ul style="list-style-type: none"> Superintendent (or designate) will review posted forms for accuracy. Respond to notification that posted forms are accurate or require edits. Indicate the edits required, if necessary. 	✓	✓
28.	Initiate staff communication	Superintendent (or designate)	<ul style="list-style-type: none"> Provide communication to all staff announcing the new or revised forms. The communication should also provide an outline of any significant changes or impact to operations. This is not the responsibility of Communication Services. 	✓	✓
29.	File confirmation and communication in E.M.S	E.A.D.	<ul style="list-style-type: none"> The notification and response from the Superintendent along with the staff communication are to be placed in the E.M.S. along with the other files. 	✓	✓



File Naming Conventions for Policies, Administrative Procedures, Protocols, Forms, and Memos

In order to avoid broken links when uploaded, documents being posted anywhere on BHNHub or the web must adhere to strict file naming conventions. When making future edits, it is imperative that the file name remains unchanged.

If you require assistance in determining an effective file name, please contact the:

- Executive Assistant to the Director
- Executive Assistant to the Superintendent of Business
- Secretary to the Superintendents of Education.

Guidelines for File Names

Do:

- Include the Policy, Administrative Procedure (AP), Form number at the beginning of the file name.
- Keep the name as short as possible; as long as its content is recognizable, there is no need to elaborate. Files names should be reflective of the policy, AP, form, or memo title.
- Add spaces between words.

Do Not:

- Use caps, underscores, or articles between words.
- Include the word 'Form' or 'Memo'.
- Include a version number in the file name.

File Names and Conventions

Board Policies, Administrative Procedures, Forms, and Appendices

Board Policies and Administrative Procedures are categorized based on the approved headings by the Board of Trustees:

<u>Section</u>	<u>Section Designator</u>
100 – School Board Governance	GOV
200 – Students	STU
300 – Human Resource Services	HRS
400 – Operations	OPS
500 – Educational Programs	EDU
600 – Information Technology Services	ITS
700 – Financial Services	FIN



Using Board Policy and Administrative Procedure 700.01 Procurement as an example, the following file naming convention applies to all Board policies (P) and administrative procedures (AP):

- **Policy:** FIN 700.01.P – Procurement
- **Forms:** FIN 700.01.F01 – Sole Single Source
FIN 700.01.F02 – Vendor Performance Evaluation
- **Appendices:** FIN 700.01.XA – Approval Schedule: Goods and Non-Consulting Services
FIN 700.01.XB – Approval Schedule: Consulting Services

Forms and appendices that are attached to policies and/or administrative procedures are numbered/ordered consecutively.

Standalone administrative procedures (i.e. they do not have a policy attached) would follow the similar naming convention noted above. Using Administrative Procedures 400.12 Flying and Displaying Flags, as an example, the following file naming convention applies to all standalone administrative procedures:

- **Administrative Procedure:** OPS 400.12.AP – Flying and Displaying Flags

Department Protocols, Standard Forms, and Memos

Protocols, forms, memos, and other documents created outside of the Board policy and administrative procedure process will show the functional area where the document originated and administered from. The following designators will be used:

<u>Area</u>	<u>Functional Designator</u>
Alternative Education	ALT
Business Services	SBO
Communications	COM
Continuing Education	CED
Curriculum/Programming	CUR
Director's Office	DOE
Facility Services	FAC
Financial Services	FIN
Governance	GOV
Health and Safety	HAS
Human Resource Services	HRS
Information Technology Services	ITS
Principals and Vice Principals	PVP
Procurement Services	PRO
Project Management Office	PMO
Special Education	SPE
Student Support Services	STU
Superintendent of Education	SOE
Transportation	STS

Functional Designators are based on the content of the document and not the author or issuer of the document. For example, if a memo outlines curriculum changes or health and safety protocols, the functional designator would be CUR and HAS, respectively. We would not use SOE or SBO as the functional designator.



Department Protocols

Using the Addition and Removal of Portables protocol issued by Facility Services as an example, the following file naming convention applies to all department protocols (Pr):

- **Protocol:** FAC.Pr – Addition and Removal of Portables

Standard Forms

Using the Change of Information form issued by Human Resource Services as an example, the following file naming convention applies to all standalone forms (F) created outside of the policy and administrative procedure process:

- **Standard Forms:** HRS.F – Change of Information

Memos

Using the Digital Citizenship memo issued by Curriculum, the following file naming convention applies to all memos (M):

- **Memos:** CUR.M – Digital Citizenship