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## ***Policy Manager Two Tutorials***

These tutorials will walk you through a few common tasks in ***Policy Manager Two***. The easiest way to learn it is to follow along and try these steps on your computer. These tutorials will probably take you 10 to 20 minutes to finish.

- Tutorial 1. Find a Regulation
- Tutorial 2. Find a Policy
- Tutorial 3. Print a Policy Worksheet
- Tutorial 4. Edit Details of a Policy (tabs)
- Tutorial 5. Link a Policy to a Regulation

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### **Tutorial 1: Find a Regulation**

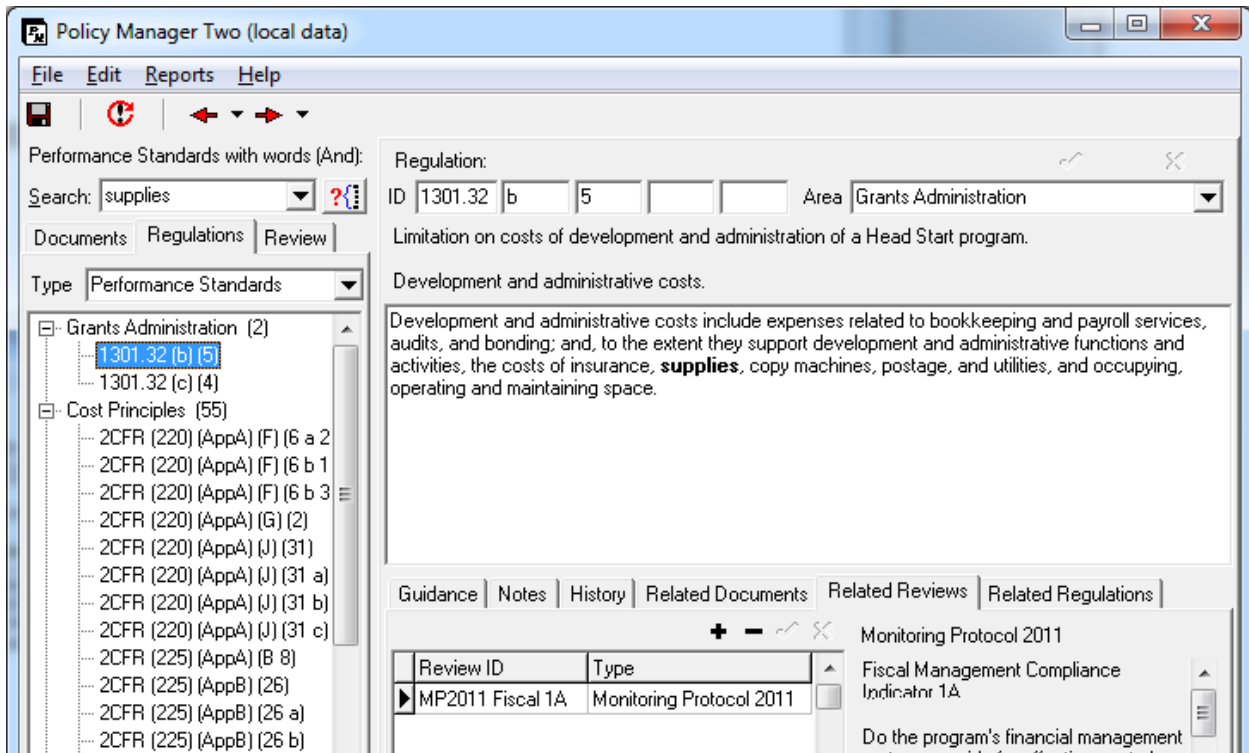


***Policy Manager Two*** comes with 3,485 Performance Standards and 5,552 Federal regulations already entered into the system. This tutorial will walk you through the steps of locating regulations.

With ***Policy Manager Two*** software running:

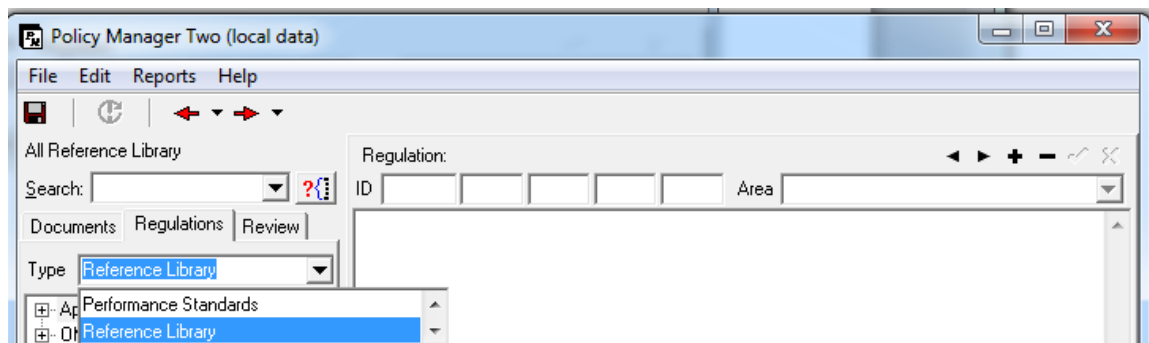
1. Click on the Regulations tab.
2. In the Type: field, select Performance Standards.
3. To search for a key word or phrase in the Performance Standards, type in the search term in the Search box, then press the Enter key.

*Example:* Let's say you want to find all of the Performance Standards with the word "supplies" in them. Type **supplies** in the Search field and press the Enter key. You will get results like this:

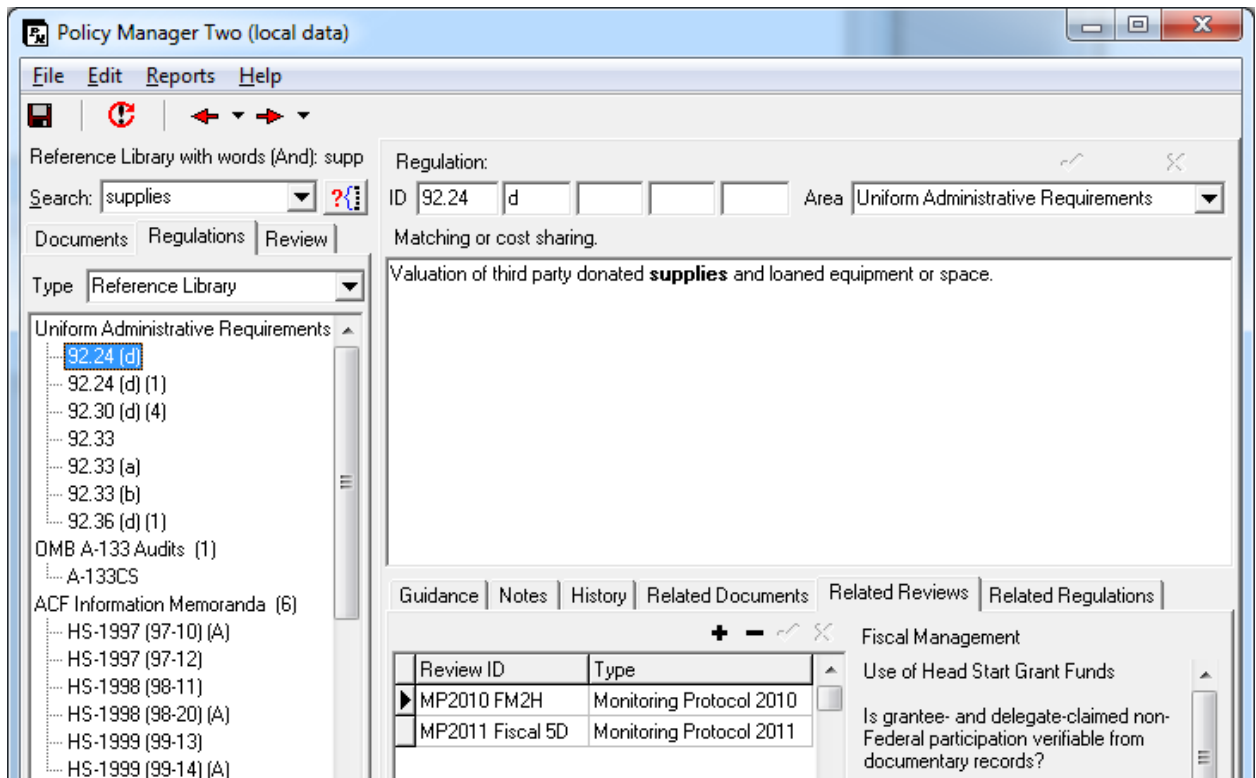



Each occurrence of your search term appears in bold text on the right-hand side of the screen.

- Click on the CFR numbers on the left-hand side of the screen to view additional occurrences of the search term.
- Before moving on to the next step, click on the *Clear All Search Results* button (🔄) at the upper left-hand side of the screen. This action refreshes the complete list (of Performance Standards, in this case).
- Next we will search for “supplies” in the Reference Library. After clearing all search results, click on the Regulations tab and select *Reference Library*. Allow a few moments for the regulations to load.



- In the Search field, type in **supplies** and press the Enter key. You will get results like these:



- Before moving on to the next step, click on the *Clear All Search Results* button (  ) at the upper left-hand side of the screen. This refreshes the complete list (Reference Library, in this case).

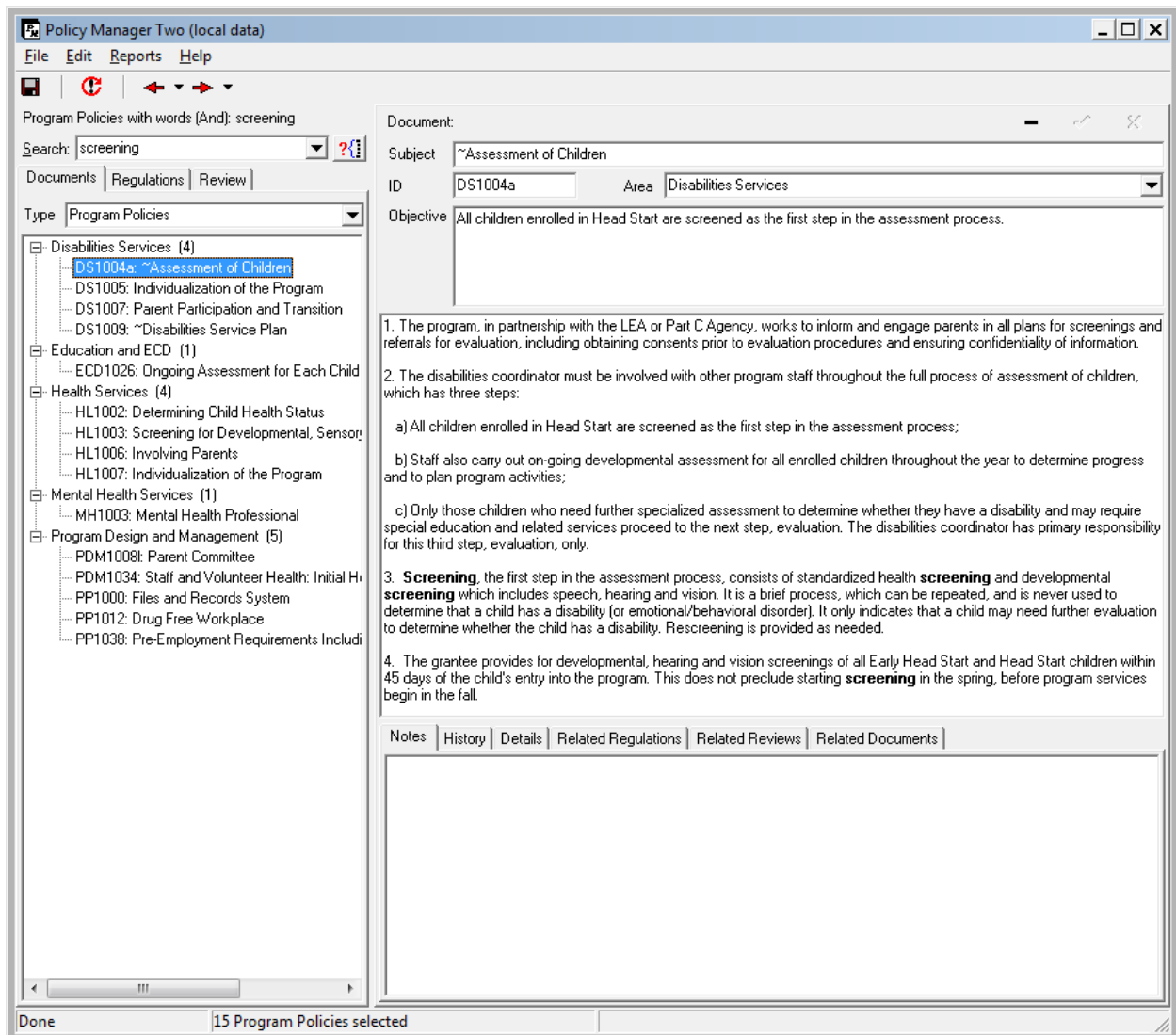
## Tutorial 2: Find a Policy



**Policy Manager Two** comes with 355 draft policies and procedures already in the system, ready for your program's review, editing, and approval process. This tutorial will walk you through the steps of locating policies.

1. Click on the Documents tab.
2. In the Type field, select *Program Policies* from the drop-down list.
3. To search for a key word or phrase in the policies, type in the search term in the Search box, then press the Enter key.

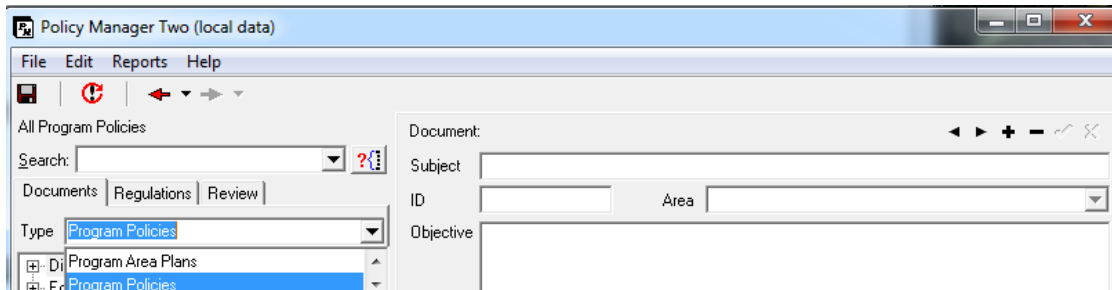
*Example:* Let's say you want to find all of your program's policies on screening. Type **screening** in the Search field, and press the Enter key. You will get results like this:



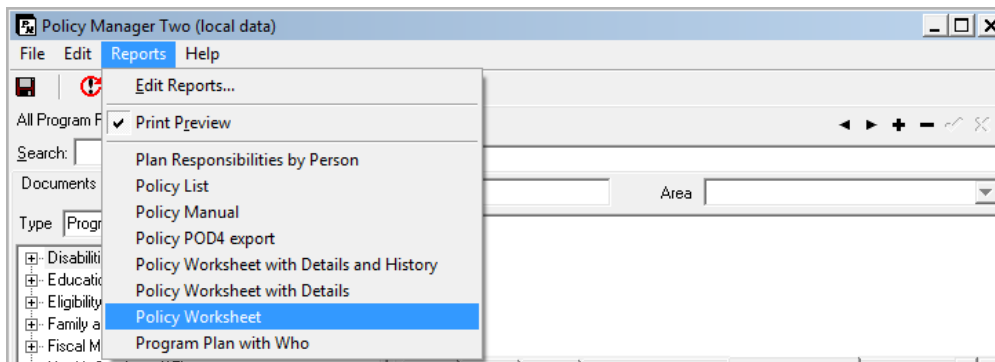
## Tutorial 3: Print a Policy Worksheet

This Tutorial shows you how to print a report in *Policy Manager Two*. Following these steps, you will print a Policy Worksheet and preview the report.

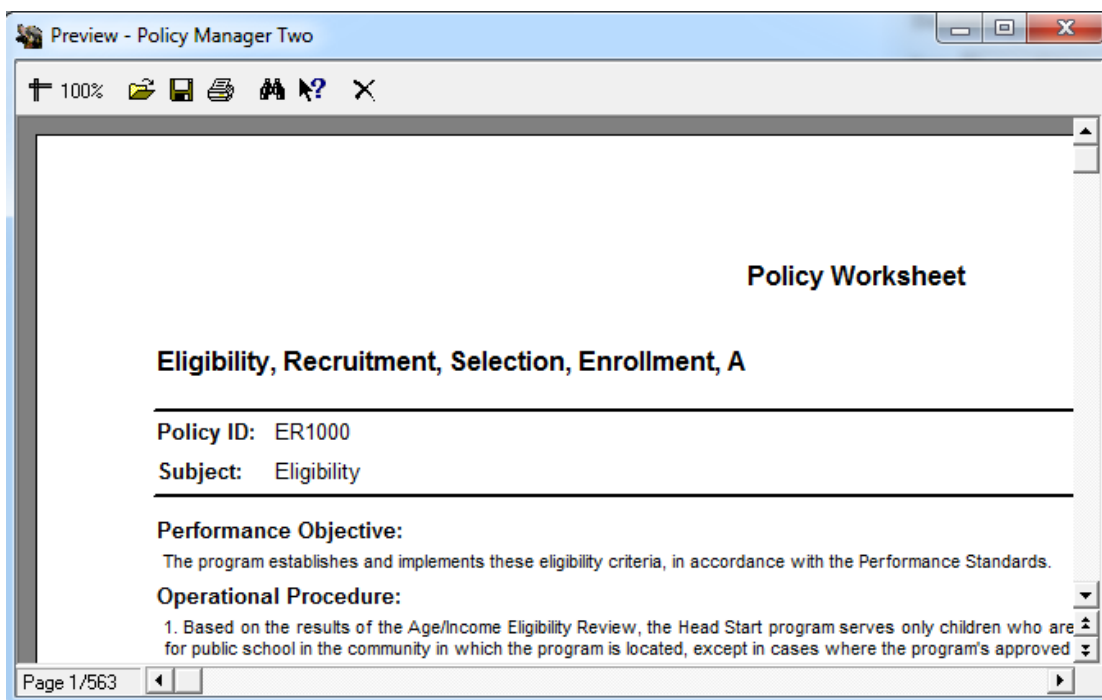
1. Click on the Documents tab and select Type: *Policies*.










2. Click the Reports menu and choose *Policy Worksheet*.



3. When the software finishes processing, you will see a print preview of the report which looks like this:



4. From this print preview window, you can save the report, change zoom levels, save the report, print all or specified pages of the report, and find text in the report by clicking:

 100%						
Scale; change zoom level	Open a report	Save this report	Print	Find text	Show help	Close preview

Click on the *Close preview button (X)*.

## **Tutorial 4: Edit Details of a Policy**

Each policy can have:

- Notes
- History
- Details
- Related Regulations
- Related Reviews
- Related Documents (Policies and Plans)

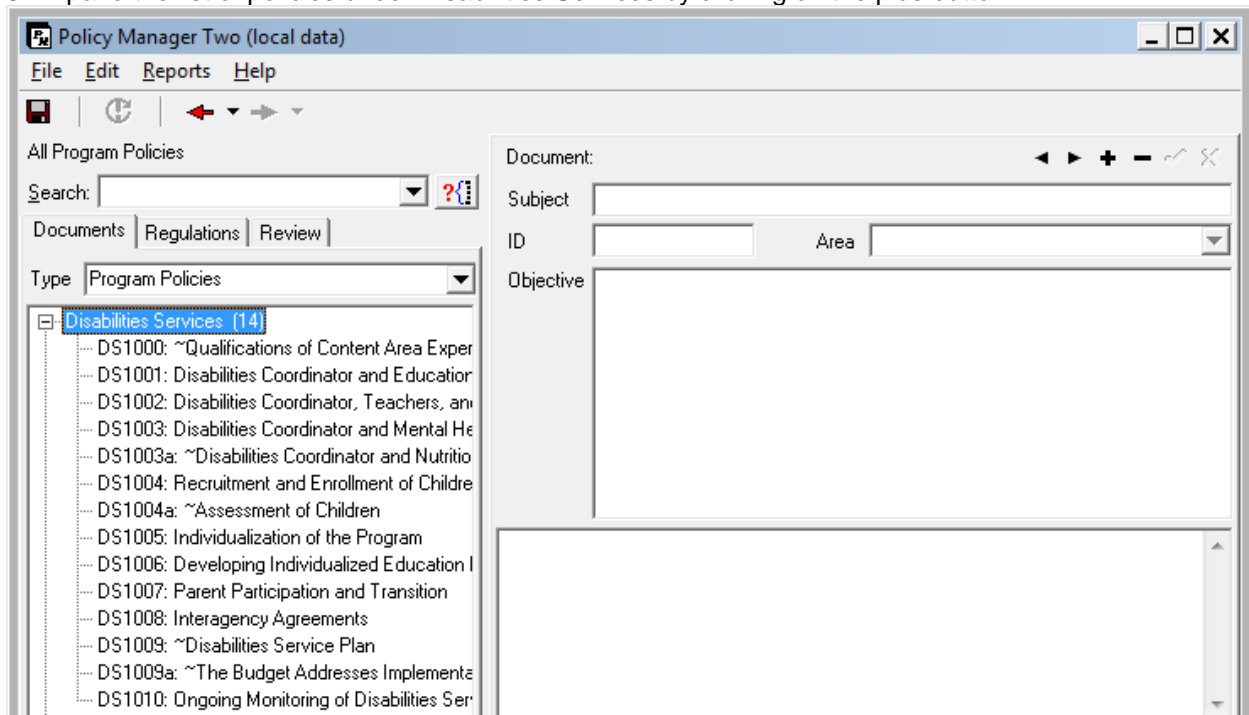
This tutorial will show you how to work with each of these.

1. Click on the Documents tab.

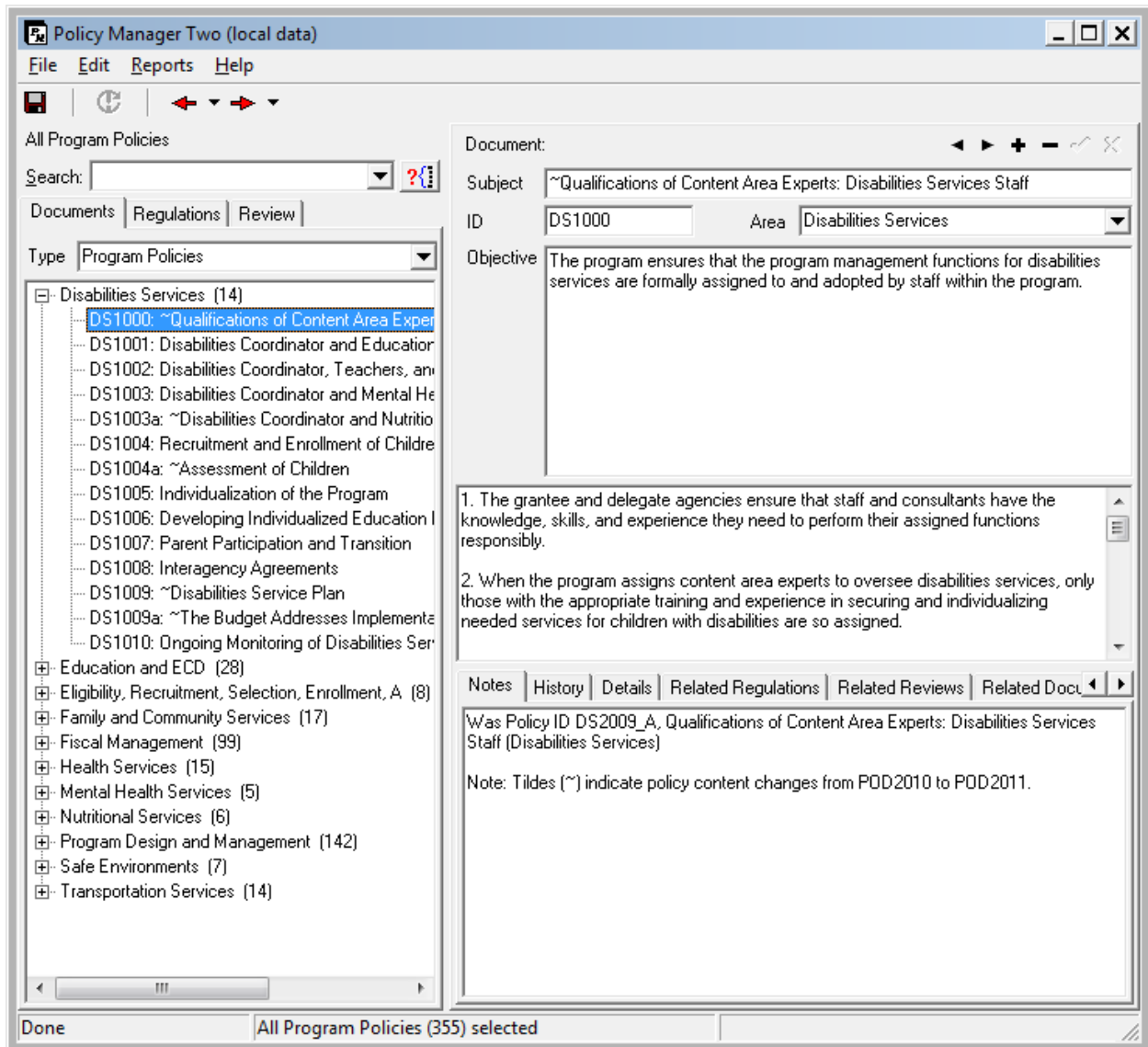
2. Select *Program Policies*.



3. Expand the list of policies under Disabilities Services by clicking on the plus button.



4. Click on the first policy in the list, which is DS1000.

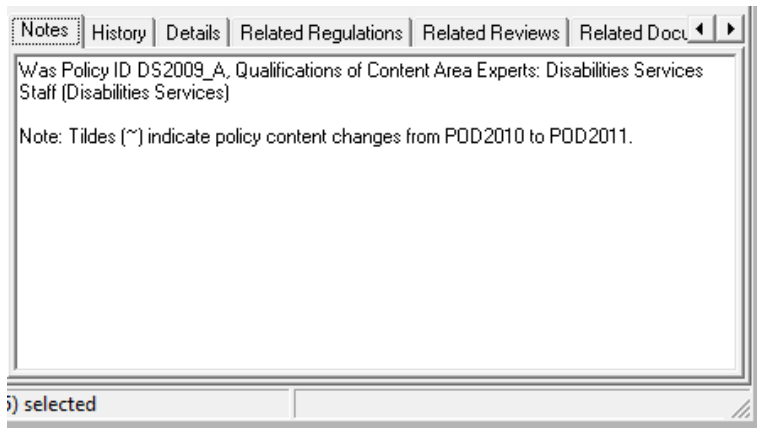


5. Look at tabs towards the middle of the screen:



### **Notes Tab**

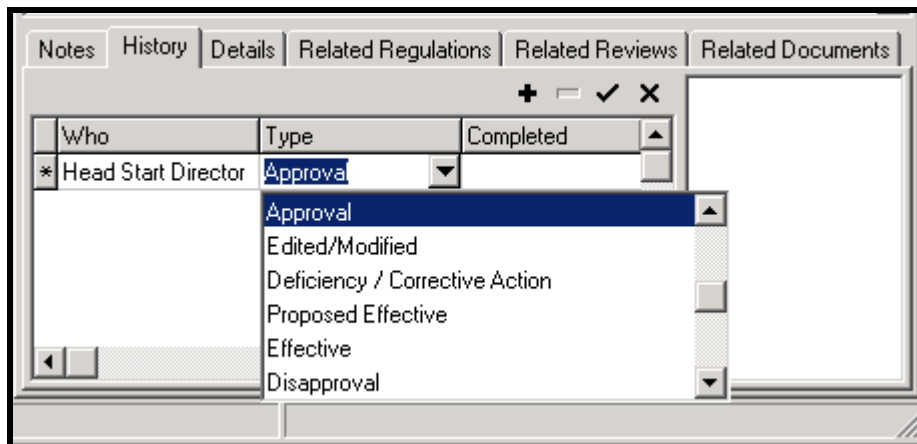
5a. Click on the Notes tab.



Use the Notes record tab to keep notes about that record. It is a text field for typing in comments, communications, etc. A few of the records have Notes from us in them.

### **History Tab**

5b. Click on the History tab.



The History tab is useful for keeping track of changes, approvals, proposed effective dates, etc. -- especially for policies and procedures.

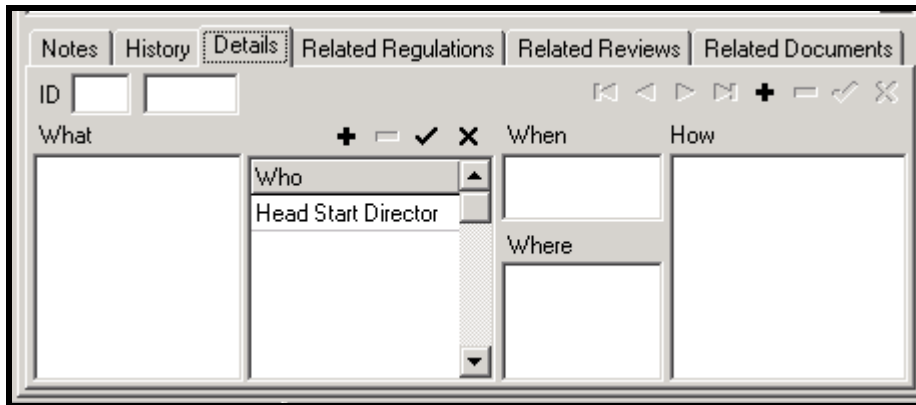
Use the History tab to indicate who (Who) performed the action (Type) and when (Completed). On the right side is a text area where you can enter notes about each history item.

The drop-down list of Who can be edited through Edit/Types/People.

The drop-down list of Type can be edited through Edit/Types/History.

### **Details tab**

5c. Click on the Details tab.

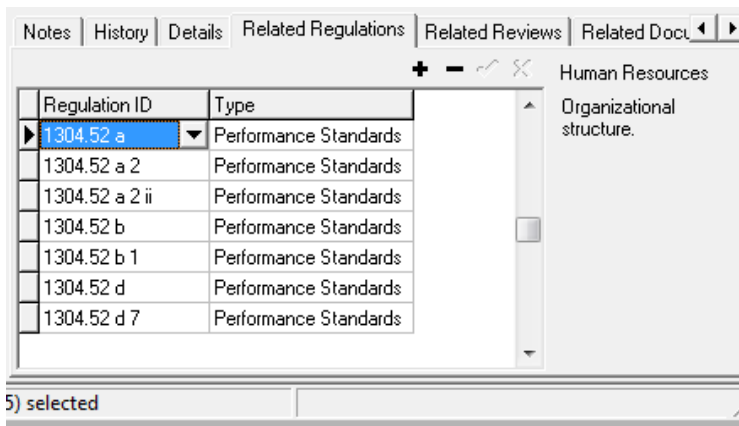


This tab lets you to keep more details about a document. It is designed to allow you to create program plans. You enter individual "line items" including What, Where, When and How.

When you are entering details, you will notice that only one detail item is displayed at a time. It will say, for example, "(of 2)" to help you see how many detail items have been entered. When you print a Program Plan report you will be able to see all of the details in a nice format on the printed page.

### **Related Regulations**

5d. Click on the Related Regulations tab.

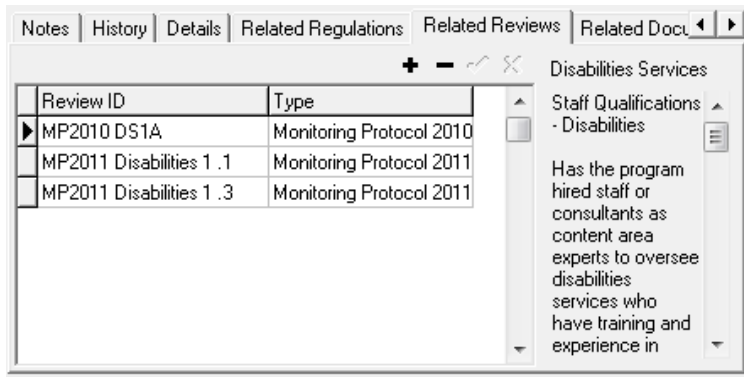


The Related Regulations record tab shows which regulation(s) the record (policy, plan, or review item) applies to.

To go to the related regulation, right-click the CFR number and click Open (or press <Ctrl> <O>).

### **Related Reviews**

5e. Click on the Related Reviews tab.



The Related Reviews record tab shows which Federal review question the record (policy, plan, or regulation) applies to, if any.

By looking at this Related Review, we can tell that the FY2011 Monitoring Protocol has two review questions relating to this policy.

To go to the related review question, right-click the Review ID number and click Open (or press <Ctrl><O>).

**Related Documents**

5f. Click on the Related Documents tab.



In some cases -- but not all -- a record relates to other documents (policies or plans). The Related Documents tab shows you which policies or plans relate to the record shown.

For Policy #DS1000, there are no related documents.

To enter a related document for a policy or plan, click in the white space underneath Document ID. A drop-down list of all Document IDs is available; type in the desired Document ID, press the tab key, then save by clicking on the check mark.

## Tutorial 5: Link a Policy to a Regulation

Policy Manager Two comes with 355 draft policies already linked to their related regulations/performance standards.

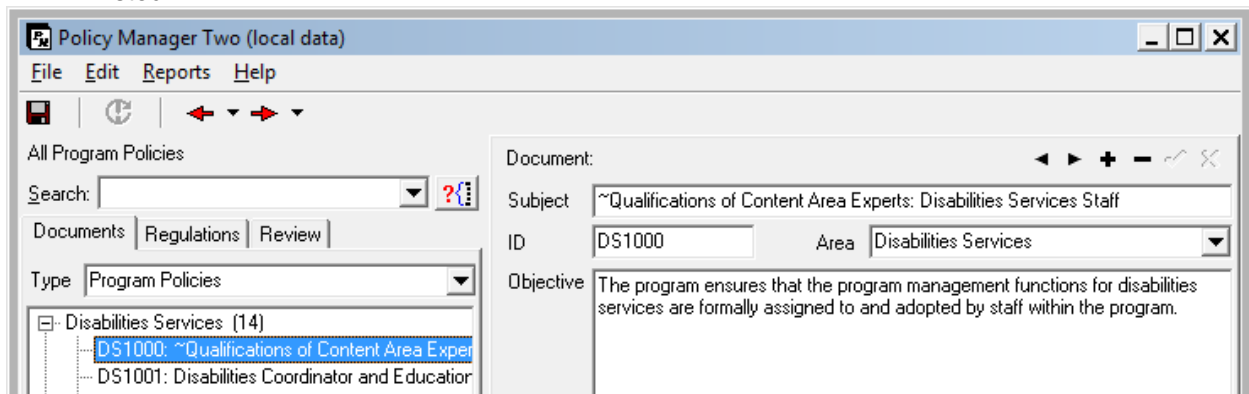
This tutorial tells you how to link a policy to a regulation.

1. Click the Documents tab and select *Program Policies* from the Type drop-down list.



2. Locate (or create) the policy to be linked to a regulation.

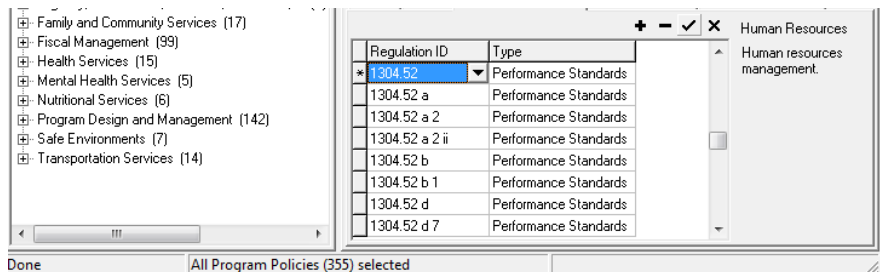
For this tutorial, we will use Policy #DS1000. Click Disabilities Services then click the first policy listed.



3. From the record tabs (lower right-hand side), click on Related Regulations.

4. Click the plus button under the Related Regulations tab and type in the CFR number that the policy relates to (example: 1304.52).

5. Press the tab button on your keyboard and/or click the check mark to save.



If the policy applies to more than one regulation, repeat the process until all related regulations appear in the Related Regulations tab for that policy.

Similarly, you can link:

Policies to Regulations  
Policies to Review Questions  
Policies to Plans

Regulations to Policies  
Regulations to Plans  
Regulations to Review Questions

Review Questions to Regulations  
Review Questions to Policies  
Review Questions to Plans

Policy to Policy  
Plan to Plan  
Regulation to Regulation

If you have any questions or comments about Policy Manager Two, please contact:

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Policy Manager web page: <http://www.cencomfut.com/polmgr.htm>