



User Manual

The complete reference for asking scenario questions, verifying evidence, and managing your district's policy workspace

Version 1.0 · Covers all features of the web platform at policytoaction.beauhawked.com

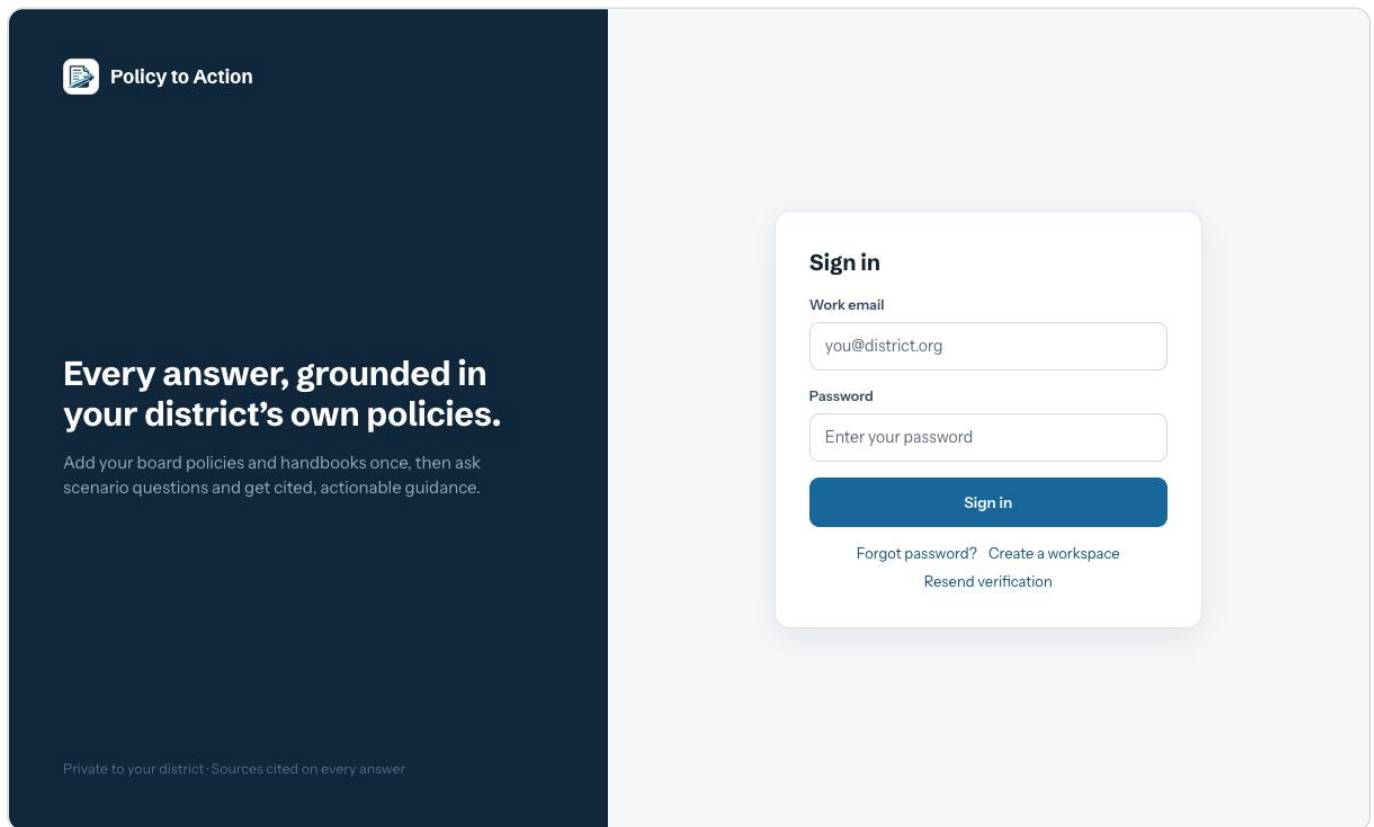
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1. Accounts and Signing In

Creating a workspace

From the sign-in screen at policytoaction.beauhawked.com, select **Create a workspace**. Enter your first and last name, your district's name, your work email, and a password. After submitting, verify your email from the message the platform sends; features unlock once your address is confirmed.



The sign-in screen. Create a workspace, sign in, recover a password, or resend verification from here.

Signing in and recovering access

Returning users sign in with email and password. **Forgot password?** emails a secure reset link that expires after a short window. **Resend verification** sends a fresh verification link if the original expired or went missing.

Privacy model

Each account has its own private workspace. Your conversations, pinned answers, and uploaded sources are not visible to other accounts, including others in your district.

2. Asking Scenario Questions

New question

1 source: Sarasota Community School District

How can I help, Beau?

Answers grounded in Sarasota Community School District's 332 policies and 0 handbooks — with the exact source text behind every claim.

Strong scenarios describe what happened, who was involved by role, and the decisions you need to make. Use placeholders such as Student A instead of real names.

A student is being bullied online — what must we do?

A parent requested education records — what's the deadline?

A teacher needs extended medical leave mid-semester.

Ask a follow-up, or describe a new scenario...

Ask

Policy to Action can make mistakes — verify critical decisions against the cited source. Use placeholders such as Student A instead of real names. Shift+Enter starts a new line.

The question screen. The header pill shows which dataset answers will draw from.

What to write

Describe the situation the way you would brief a colleague: what happened, who was involved by role, what has already been done, and what you need to decide. The platform handles multi-part scenarios and answers each embedded question separately. Longer, more specific scenarios produce more precise citations.

Composer controls

- **Enter** submits your question; **Shift+Enter** starts a new line.
- Scenarios can be up to 8,000 characters.
- Use placeholders such as "Student A" or "a staff member" rather than real names.
- Follow-up questions in the same conversation keep the scenario's context.

Starting fresh

Select the pencil icon in the left rail to start a new question. Your previous conversation is saved automatically to History.

3. Reading and Verifying Answers

The screenshot displays the Policy to Action interface. At the top, a header bar shows the time 'At 9:40 AM during passing period at a middle school, two 7th-grade students become in...' and the source '1 source · Sarasota Community School District'. Below this, the main content area is divided into two columns. The left column contains a list of policy summaries, each with a code and title: '70 • Bullying and Harassment', '305 • Threat Assessment Teams', '34 • Expulsion of Students', '32 • Zero Tolerance for School Related Crimes', '35 • Respect and Civility in Schools and...', and '70 • Student Records'. The right column contains the 'RECOMMENDED ACTIONS' section, which lists three steps: 1. Investigate the incident thoroughly using witness statements and hallway camera footage to establish facts about the verbal and physical altercation. 2. Evaluate whether Student A's repeated mocking comments meet the district's bullying and harassment definition by assessing if the conduct substantially interfered with Student B's ability to participate in school activities. 3. Consider disciplinary consequences for both students consistent with the district's fighting and student discipline policies. Recognize that... Below the recommended actions, there is a footer section with a note: 'Policy to Action can make mistakes — verify critical decisions against the cited source. Use placeholders such as Student A instead of real names. Shift+Enter starts a new line.' On the far left, there is a vertical sidebar with icons for editing, clock, star, and a plus sign. On the far right, there are buttons for 'Latest' and 'Ask'.

At 9:40 AM during passing period at a middle school, two 7th-grade students become in... 1 source · Sarasota Community School District

70 • Bullying and Harassment. This policy prohibits bullying and harassment in all school-related settings, including cyberbullying, and mandates disciplinary action for violations. It applies to conduct during any educational program or activity, on school property, or through technology if it substantially interferes with the victim's participation in school.

305 • Threat Assessment Teams. Defines concerning behavior and communications that may indicate safety risks, including aggressive or violent behaviors. It emphasizes the need for assessment of such behaviors to ensure safety.

34 • Expulsion of Students. Expulsion may be recommended for serious breaches of conduct such as violence or willful disobedience. The principal or designee may recommend expulsion for acts that substantially disrupt school order or involve violence.

32 • Zero Tolerance for School Related Crimes. Establishes that schools must be safe and orderly, protecting all from harm. It includes a presumption that self-defense or defense of others using necessary force is justified. It applies to serious offenses that threaten safety on school property or activities.

35 • Respect and Civility in Schools and.... Promotes a safe, harassment-free environment and orderly conduct among students and staff. It prohibits disruptive or threatening behavior and requires staff to take necessary actions to maintain safety and civility.

70 • Student Records. Governs the maintenance and privacy of student records in compliance with applicable laws. It assigns responsibility for controlling and supervising student records to district personnel.

70 • Bullying and Harassment **305 • Threat Assessment Teams** **34 • Expulsion of Students**

32 • Zero Tolerance for School Related Crimes **35 • Respect and Civility in Schools and...** **70 • Student Records**

RECOMMENDED ACTIONS

1. Investigate the incident thoroughly using witness statements and hallway camera footage to establish facts about the verbal and physical altercation.
2. Evaluate whether Student A's repeated mocking comments meet the district's bullying and harassment definition by assessing if the conduct substantially interfered with Student B's ability to participate in school activities.
3. Consider disciplinary consequences for both students consistent with the district's fighting and student discipline policies. Recognize that

Ask a follow-up, or describe a new scenario... Ask

Policy to Action can make mistakes — verify critical decisions against the cited source. Use placeholders such as Student A instead of real names. Shift+Enter starts a new line.

An answer card: policy summaries, citation chips, recommended actions, and implications.

The anatomy of an answer

- **Policy summaries** identify each policy that applies and what it requires, with the policy code and title in blue.
- **Citation chips** beneath the summaries link every source used. Selecting a chip opens the evidence panel.
- **Recommended actions** are numbered steps grounded in the cited policies.
- **Implications** explain the consequences of following or not following the cited requirements.
- The footer notes when sources were captured, plus **Pinned** and **Copy** actions.

The evidence panel

The screenshot displays the Policy to Action interface. At the top, a header bar shows the context: "At 9:40 AM during passing period at a middle school, two ...". A blue "Evidence" button is active, and a source is listed: "1 source · Sarasota Community School District".

The main content area is divided into two sections. The top section contains a quote from a building administrator: "building administrator responsible for the situation, you must determine the appropriate next steps. Key questions include: What disciplinary consequences, if any, should apply to each student? Does Student B's IEP and BIP require additional procedural steps before discipline is assigned? Does the verbal harassment from Student A qualify as bullying under district policy? How should the school respond to the student-recorded videos now circulating online? What communication should occur with parents and district leadership? You must determine an immediate course of action while ensuring compliance with district policy, special education law, and student conduct procedures."

The bottom section lists four policy excerpts:

- 70 · Bullying and Harassment.** This policy prohibits bullying and harassment in all school-related settings, including cyberbullying, and mandates disciplinary action for violations. It applies to conduct during any educational program or activity, on school property, or through technology if it substantially interferes with the victim's participation in school.
- 305 · Threat Assessment Teams.** Defines concerning behavior and communications that may indicate safety risks, including aggressive or violent behaviors. It emphasizes the need for assessment of such behaviors to ensure safety.
- 34 · Expulsion of Students.** Expulsion may be recommended for serious breaches of conduct such as violence or willful disobedience. The principal or designee may recommend expulsion for acts that substantially disrupt school order or involve violence.
- 32 · Zero Tolerance for School Related Crimes.** Establishes that schools must be safe and orderly, protecting all from harm. It includes a presumption that self-defense or defense of others using necessary force is justified. It applies to serious offenses that threaten safety on school property or

At the bottom of the main content area, there is a "Latest" button and an "Ask" button. Below the "Ask" button is a text input field: "Ask a follow-up, or describe a new scenario...".

The right sidebar, titled "EVIDENCE", shows the selected source: "70 - Bullying and Harassment". It contains the full text of the policy excerpt: "This policy prohibits bullying and harassment in all school-related settings, including cyberbullying, and mandates disciplinary action for violations. It applies to conduct during any educational program or activity, on school property, or through technology if it substantially interferes with the victim's participation in school." Below this text are two buttons: "Open full source" and "Pin this answer". At the bottom of the sidebar, a note states: "This excerpt is the exact text the answer was grounded in, from your uploaded sources."

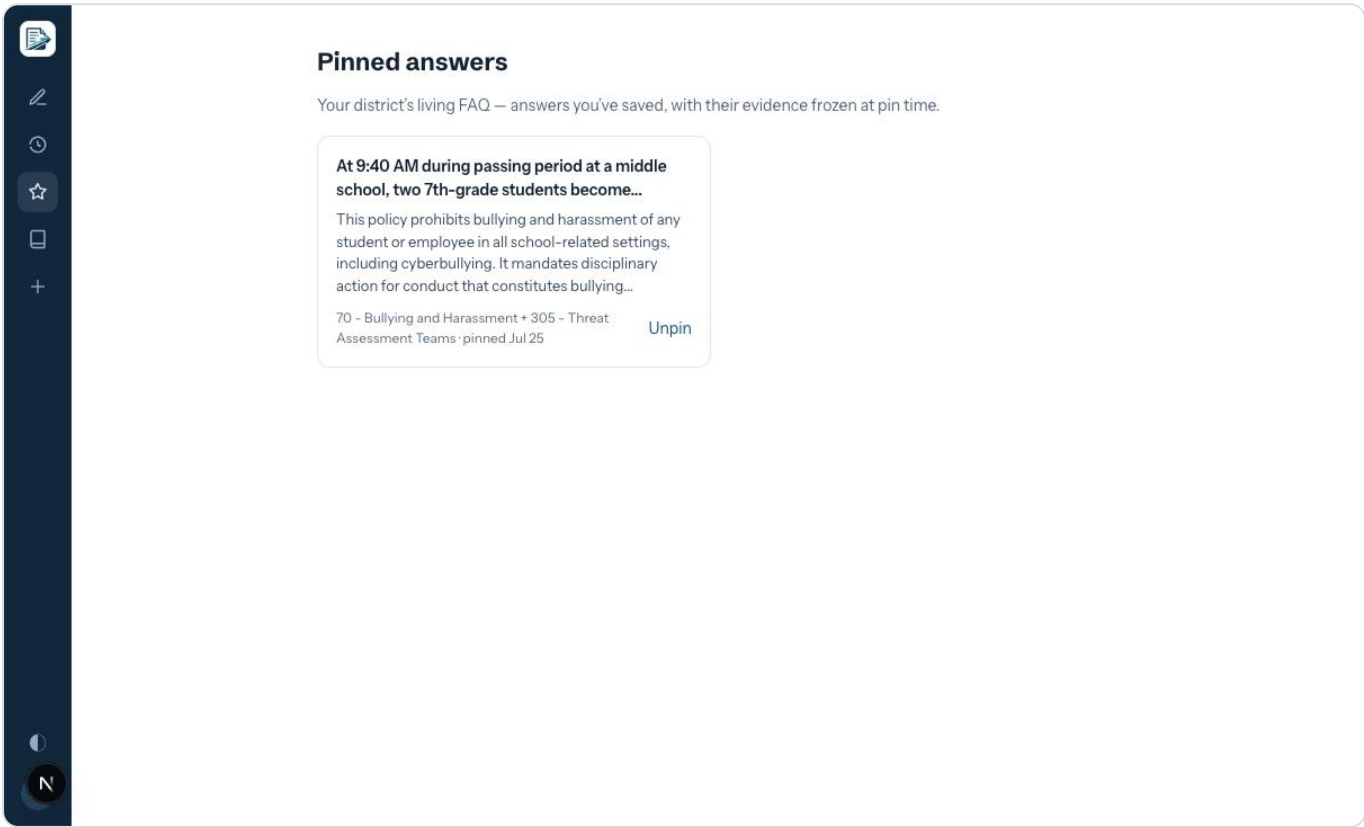
At the bottom of the interface, a footer note reads: "Policy to Action can make mistakes — verify critical decisions against the cited source. Use placeholders such as Student A instead of real names. Shift+Enter starts a new line."

The evidence panel quotes the exact text the answer was grounded in.

The panel shows the exact policy excerpt behind the citation, its section, and its dataset. **Open full source** opens the complete policy text. Close the panel with the X or the Escape key; the **Evidence** button in the header reopens it at any time. Keyboard users will find focus moves into the panel when it opens and returns to the citation when it closes.

The verification habit: Policy to Action is decision support, not a decision maker, and not legal advice. For consequential decisions, open the evidence, read the source, and confirm the guidance matches your district's current procedures.

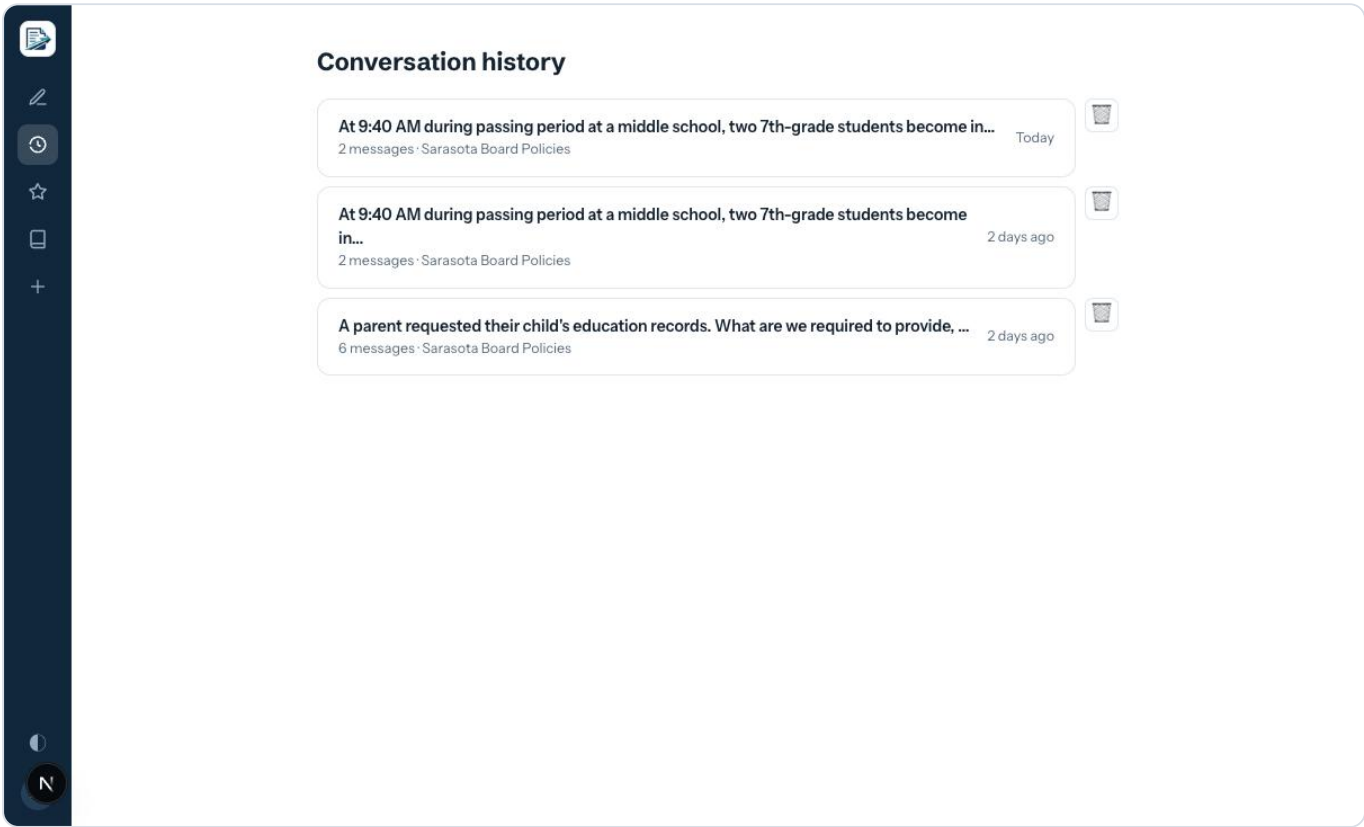
4. Pinned Answers



Pinned answers preserve guidance with its evidence, building a personal reference library.

Select **Pin** under any answer, or **Pin this answer** in the evidence panel, to save it to the Pinned view (star icon). Pins are stored on the server per dataset, so they survive sign-outs and device changes. Each card shows the original question, the answer summary, its citations, and when it was pinned. **Unpin** removes a card.

5. Conversation History



History keeps every conversation. Reopen to continue, or delete permanently.

Every conversation saves automatically with a title from your first question. Open the History view (clock icon), select any row to reopen it with full context, and continue asking follow-ups. The trash can permanently deletes a conversation after confirmation; deletion cannot be undone.

6. The Library

Library

Search all 332 policies...

+ Add source

All sources (1)

Policies (1)

Student handbook (0)

Staff handbook (0)

Archived (9)

TITLE		ROWS	HEALTH	UPDATED	SOURCE	
Sarasota Board Policies	ACTIVE	332	● Good	Jul 24	Scraper · Table-based	

Your student handbook and staff handbook hasn't been added — related questions will answer from policies only.

Add it now

The Library: every source, its health, and full-text search across all policies.

Searching policies

The search field queries code, title, and full policy text across your active dataset. Results show matching excerpts; selecting one opens the policy detail view with the full text, metadata, a **Copy** action, and an **Ask about this policy** shortcut that pre-fills the composer.

Related policies



student enrolled in a Florida public school in kindergarten through grade 12 is eligible for a scholarship under this program if the student reported an incident of battery; harassment; hazing; bullying; kidnapping; physical attack; robbery; sexual offenses, harassment, assault, or battery; threat or intimidation; or fighting at school as defined by FS 1006.09(6).

XVI. Review of Policy

A. The District shall involve students, parents, teachers, administrators, school staff, school volunteers, community representatives, and local law enforcement agencies in the process of adopting and revising bullying and harassment policy.

B. Bullying and harassment policy review shall be ongoing and integrated with each school's curriculum, discipline policies, and violence prevention efforts. The District shall meet all legal requirements for policy review.

Statutory Authority: 1001.41, 1001.42, F.S.

Law(s) Implemented: 1001.43, 1003.04, 1003.31, 1003.32, 1006.07, 1006.08, 1006.09, 1006.10, 1006.147, F.S. 20 USC 1232g

History: ADOPTED: 12/9/08
REVISION DATE(S): 06/17/14, 08/02/16, 11/06/18, 08/04/20, 09/19/23
FORMERLY: 5.323*

RELATED POLICIES

71 • Prohibiting Discrimination and Harassment

71a • Discrimination and Harassment Complaint Procedures

72 • Student Dating Violence and Abuse Policy

73 • Educational Equity

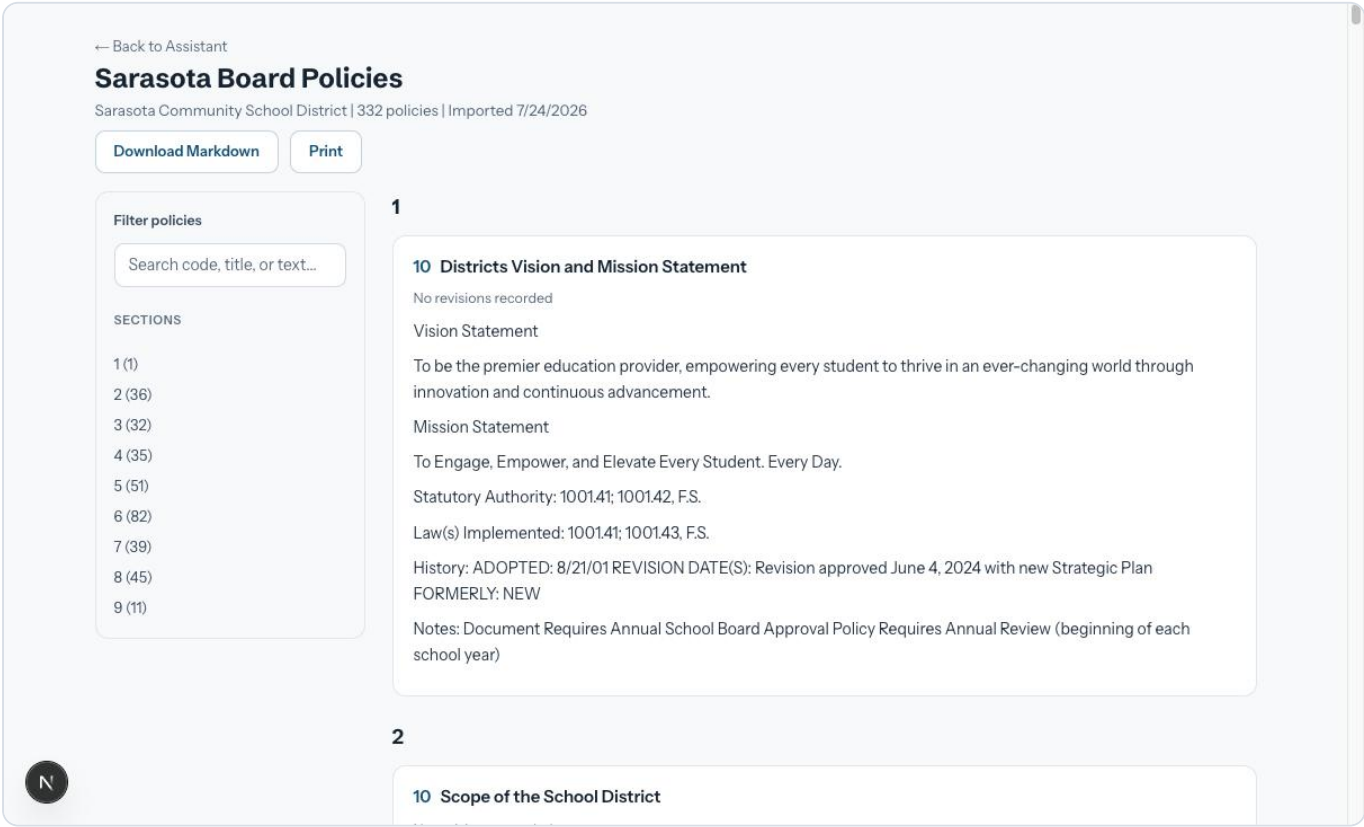
Policy detail ends with Related policies: cross-referenced and neighboring policies, one click away.

Each policy detail page ends with **Related policies**: policies cited within the text you are reading, plus close neighbors from the same section. Selecting a chip navigates directly to that policy.

Policy to Action

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The full reader



The full reader presents the entire manual with section navigation, filtering, print, and Markdown export.

The overlapping-squares icon on any Library row opens the complete document in a dedicated reader with a section table of contents, filtering, **Print**, and **Download Markdown** for board packets or offline reference.

7. Adding and Managing Sources

Add a source

Import from district website Upload CSV Upload handbook PDF

<https://go.boarddocs.com/in/blm/Board.nsf/Public> Scan

Platform: Auto-detect ☐ Include all books Source name (optional)

Add a source: website import, CSV upload, or handbook PDF.

Importing policies

Import from district website scans your policy site (BoardDocs, table-based, and accordion-with-PDF platforms are supported, with automatic detection), then shows a preview with policy counts, sample rows, and quality signals before anything is committed. **Upload CSV** accepts a spreadsheet export with section, code, title, and wording columns, with the same preview safeguards.

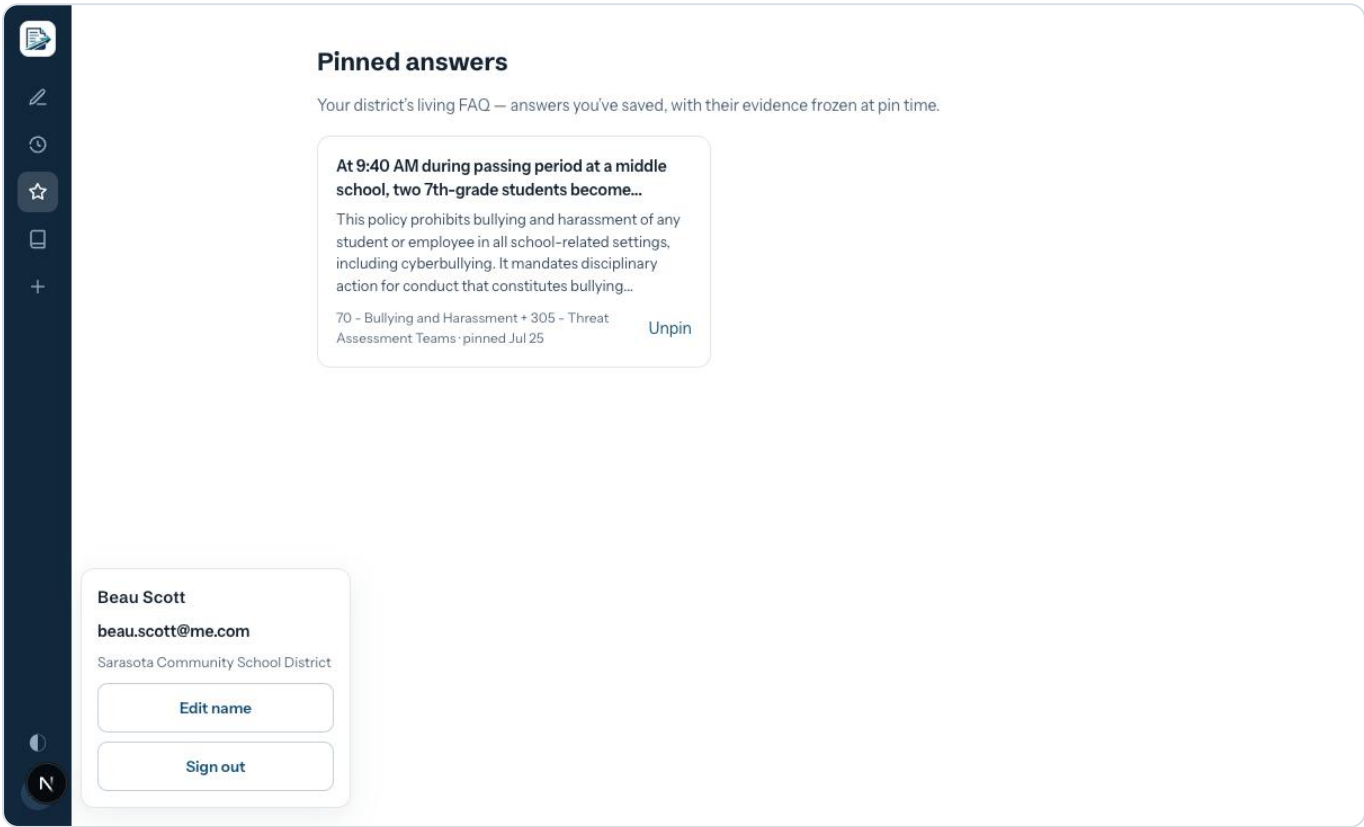
Handbooks

Upload handbook PDF ingests student and staff handbooks, splitting them into citable sections. Answers then draw on handbooks alongside board policies and cite the specific passage.

Source lifecycle

- **Active:** the dataset answers draw from. With multiple datasets, use the checkmark to switch.
- **Rename:** the pencil icon changes a source's display title.
- **Archive:** excludes a source from answers while preserving it. Restore any time from the Archived pill.
- **Delete:** permanently removes a source and its content after confirmation. Prefer archiving for superseded manuals.

8. Your Account and Accessibility



The account menu: your name, district, name editing, and sign out.

Your avatar (bottom of the left rail) opens the account menu, which shows your name, email, and district, and offers **Edit name** and **Sign out**. The half-circle icon above it toggles a high-contrast theme. The interface supports full keyboard navigation: Tab moves between controls, visible focus outlines track your position, and Escape dismisses panels and menus. Printing any conversation produces a clean document without navigation furniture, suitable for board packets.

9. Troubleshooting

Symptom	Resolution
Verification email has not arrived	Check spam or quarantine folders; the sender is Policy to Action. Use Resend verification on the sign-in screen. Some district mail filters take several minutes.
Forgot password	Use Forgot password on the sign-in screen. Links expire quickly; request a fresh one if yours has aged.
Answer cites nothing or seems generic	Confirm the correct dataset is Active in the Library and that its health reads Good. Add more scenario specifics; vague questions produce vague citations.
"0 sources" appears in the header	No active policy dataset exists yet. A setup administrator should import policies via Add source.
Import preview looks wrong	Discard rather than commit. Try selecting the specific platform instead of Auto-detect, or use the CSV path.
Offline banner appears	The platform detected no connection. Saved conversations remain readable; new questions need connectivity.
Something else	Note what you did, what you expected, and what happened, and contact support. Screenshots help.

Policy to Action User Manual, Version 1.0. Guidance is generated from your district's uploaded policies and handbooks and is not legal advice. Verify critical decisions against the cited source text.