



Policies and Procedures Guide

Overview

Welcome to the Policies and Procedures guide. This guide covers the Policy / General Orders module, which allows you to upload documents and send out policy documents so that employees can read them and acknowledge them.

This guide will show you how to add new policy documents, searching existing policy records, updating policies to send out revisions, making reports of who has viewed policies, and more.

A screenshot of a web application's "Policy: Search" interface. The interface has a light blue header with the title "Policy: Search" and several navigation buttons: "NEW POLICY", "AUDITS", "TOPICS", "REPORTS", and "MAINTAIN FILES". Below the header is a row of filter buttons: "ALL ACTIVE RECORDS", "ALL IN-ACTIVE RECORDS", "UPDATED LAST 30 DAYS", "PUBLISHED LAST 60 DAYS", "ACTIVATED IN LAST 60 DAYS", "TO BECOME ACTIVE AFTER TODAY", "PAST NEXT REVIEW DATE", and "TO REVIEW NEXT 90 DAYS". The main search area contains several input fields: "Active Dates From:" and "Active Dates Through:" with calendar icons, an "Include In-Active" checkbox, "Policy Title:", "Policy Number:", "Policy Chapter:", "Violation Code:", and "Policy Keyword:". There is also a "Policy Type:" dropdown menu. At the bottom, there is a "Show Archived Only" checkbox and two buttons: "LOOKUP" and "CLEAR FILTER".

The first part of this guide explains searches. If you need explanations on an already existing record, see *Filling Out a Policy Record* to get more information on the different tools and tabs available.



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Searching for Existing Policy / General Order Records

To access the Policy / General Orders module, begin on the iSOMS home screen.

Navigate to:

Admin → **Agency** → **Policy / General Orders**



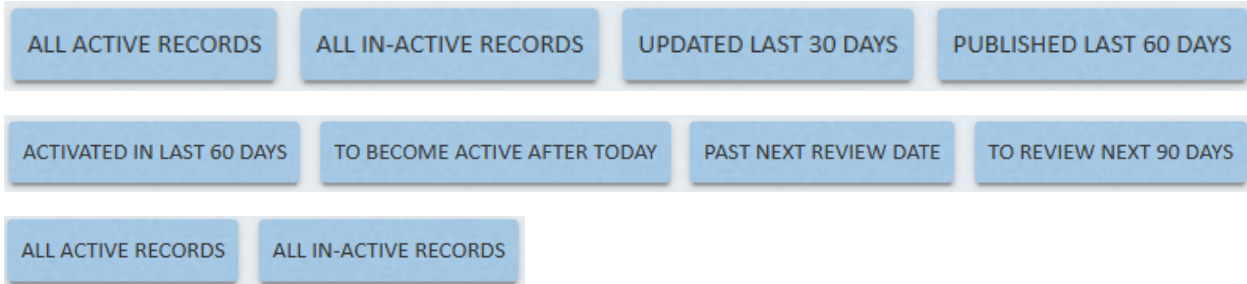
This will open the **Policy: Search** screen. Here you can use the blue Quick Search buttons to perform do *quick searches* (common predetermined searches), or you can use the filters to narrow the search for things such as Policy Number or Policy Type.



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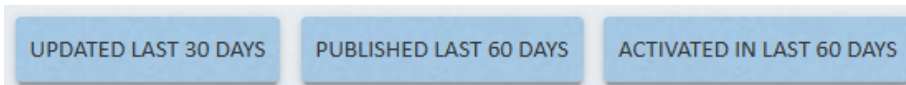
Quick Searches

These searches let you quickly find records without having to fill in the fields. The following searches are available:



All Active Records shows all policies that currently have an active date within the policy's active date range.

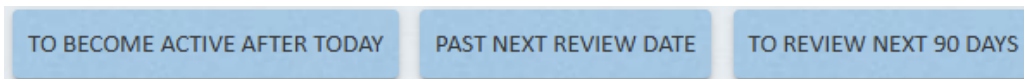
All In-Active Records shows all policies that currently *do not* have an active date within the policy's active date range.



Updated Last 30 Days shows all records that have a revision / edit within the last 30 days.

Published Last 60 Days shows all records that have been published in the last 60 days, as record in the **Last Published Date** field.

Activated in Last 60 Days shows all records that *became* active in the last 60 days, as determined by **Active Date**.



To Become Active After Today shows all records with an **Active Date** in the future.

Past Next Review Date shows all records that should be reviewed. This is determined by records with a **Next Review Date** in the past.

To Review Next 90 Days shows all records with a **Next Review Date** within the next 90 days from today.



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Standard Searches

Some fields are available if you need to do a search that the quick searches won't work for. Fill in the fields to narrow the search and click **Lookup** at the top or bottom of the page to perform the search. If you need to start over, simply click **Clear Filter** to remove all search field entries.

LOOKUP

CLEAR FILTER

Active Dates From:



Active Dates Through:



These fields let you search for records with an **Active Date** in the range between the two dates specified.

Policy Title:

Policy Number:

Policy Chapter:

Violation Code:

Policy Keyword:

Policy Type:

Show Archived Only

These fields allow you to narrow by Policy information or type.

Policy Keyword searches the narrative and finds policies with the given keyword.

Policy Type allows you to search by policy categories.

As mentioned above, when you have finished with your search parameters, click **Lookup** to perform your search. Double click on the desired entry to view or edit the record.

Policy: Search Results

LOOKUP NEW POLICY REPORTS MAINTAIN FILES

Search Criteria ▶

Search Results

367 Records

EXPORT GRID TO FILE

| Policy Type | Policy # | Title | Chapter | Paragraph | Section | Violation Code | Active On | In-Active On | Last Published | Next Review Date | | |
|-------------------|----------|--|---------|-----------|---------|----------------|------------|--------------|----------------|------------------|--|--|
| DEPARTMENT POLICY | 03-03 | EMERGENCY ASSISTANCE TO SHERIFF'S OFFICE EMPLOYEES | | | | | 03/30/2010 | | 12/19/2006 | | | |
| DEPARTMENT POLICY | 03-04 | CRITICAL INJURY/DEATH OF SHERIFF'S OFFICE EMPLOYEE | | | | | 03/30/2010 | | 11/26/2025 | 11/26/2026 | | |
| DEPARTMENT POLICY | 03-05 | HEALTH AND FITNESS | | | | | 03/30/2010 | | 11/26/2025 | 11/26/2026 | | |
| DEPARTMENT POLICY | 03-06 | AWARDS AND COMMENDATIONS | | | | | 03/30/2010 | | 11/26/2025 | 11/26/2026 | | |
| DEPARTMENT POLICY | 03-07 | POLITICAL ACTIVITIES | | | | | 05/09/2012 | | 05/09/2012 | | | |



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Creating a Policy

To create a new policy, click **New Policy** in the upper right corner of the Policy search screen:

The screenshot shows the "Policy: Search" interface. At the top right, there are navigation buttons: "NEW POLICY", "AUDITS", "TOPICS", "REPORTS", and "MAINTAIN FILES". Below these are several filter buttons: "ALL ACTIVE RECORDS", "ALL IN-ACTIVE RECORDS", "UPDATED LAST 30 DAYS", "PUBLISHED LAST 60 DAYS", "ACTIVATED IN LAST 60 DAYS", "TO BECOME ACTIVE AFTER TODAY", "PAST NEXT REVIEW DATE", and "TO REVIEW NEXT 90 DAYS". The main search area includes fields for "Active Dates From:" and "Active Dates Through:" with calendar icons, and an unchecked checkbox for "Include In-Active". Below these are input fields for "Policy Title:", "Policy Number:", "Policy Chapter:", "Violation Code:", and "Policy Keyword:". There is also a "Policy Type:" dropdown menu and an unchecked checkbox for "Show Archived Only". At the bottom of the search area are "LOOKUP" and "CLEAR FILTER" buttons.

NEW POLICY

Confirm you want to make a new record. This will create and open the new record.

The screenshot shows the "Policy: View Record" interface. At the top, it says "Policy: View Record". Below this, there are four navigation buttons: "<< FIRST", "< PRIOR", "NEXT >", and "LAST >>".



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To add a policy, you will first add the overarching details in the fields. Then you will create a revision in the **Revisions** tab where you can push out notifications to employees about the policy or general order you've created.

There are two primary sections of the record:

1. The *fields* in the upper part of the screen. These record details on the policy in general, including when it is active and when it should be reviewed.

2. The *tabs* record the **Revisions** (which is where the primary documents go) as well as any Notes, Images, and/or Attachments on the policy.



After you enter new details, make sure to click **Save** at the top of the screen.





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Creating a Policy – Fields


Fields

Active Date: 04/13/2026  In-Active Date: 04/24/2026 

These fields determine the active and inactive period. Add **Active Date** when the policy goes into effect and the **In-Active Date** if the policy expired.

Last Published Date: 04/13/2026  Next Review Date: 04/24/2026 

Add the **Last Published Date** for the date on which the policy was published. Also add **Next Review Date** to have a reminder for the next review of the policy and related documents.

Policy Type: PROCEDURE  

Choose the **Policy Type**, such as *Procedure*, *General Order*, *Department Policy*, etc. You can add additional options in *Maintain Files* if you are a Super User.

| Policy #: | Chapter: | Paragraph: | Section: |
|-------------------------------------|----------|------------|----------|
| <u>12345</u> | <u>2</u> | <u>3</u> | <u>4</u> |
| Title: <u>POLICY ON MATHEMATICS</u> | | | |

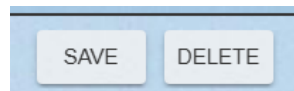
Now add the **Policy #, Chapter, Paragraph, Section, and Title** as needed.

Violation Code: V12345

If your policy has a **Violation Code**, you can add it here as well.

Remember to hit **Save** at the top of the screen often as you fill out the record to avoid losing information.

Save is located at the top of the screen.





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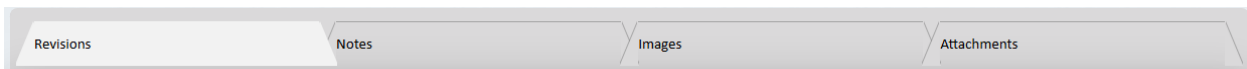
Creating a Policy – Tabs

Summary

Fill out the tabs below the fields as needed.

Begin with the **Revisions** tab. Here you will upload documents for employees to read the policies and procedures of your agency.

Notes, **Images**, and **Attachments** tabs are available if you need to take additional notes or upload images and documents.










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Revisions Tab

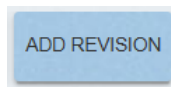


The **Revisions** tab lists the revisions to the policy / procedure in the grid. To view a current revision, double-click it or click the **View** icon () from the table. To print notification history, click the **Print** icon () from the table.

| Effective Date | Original | Revision | | | |
|----------------|-----------|--------------|---|---|---|
| 02/26/2018 | NEW ADMIN | Admin change |  |  |  |

Need to speak with your supervisor

To add a new Revision, click **Add Revision**.




This will open a new Policy Revision where you will fill in the details on the revision.

Policy: View Policy Revision

REPORTS MAINTAIN FILES

<< FIRST < PRIOR NEXT > LAST >> SAVE DELETE

POLICY: 01-01 ORGANIZATION Effective Date:  ACKNOWLEDGE POLICY REVISION Exclude From Notifications

Original:

Revised To:

Summary:

Notifications Attachments

0 Records EXPORT GRID TO FILE ADD NOTIFICATION

No Records.



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First, add the **Effective Date** for when the policy goes into effect.

Effective Date:
 05/18/2026

If you want to prevent this revision from being shown as a notification, click **Exclude from Notifications**.

Exclude From Notifications

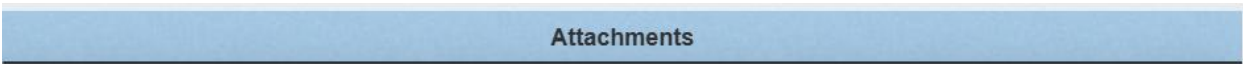
Optionally you can add notes on the **Original** policy, what the policy was **Revised To**, and the **Summary** of the revision here.

Original:
 ADD NOTES ON ORIGINAL POLICY HERE

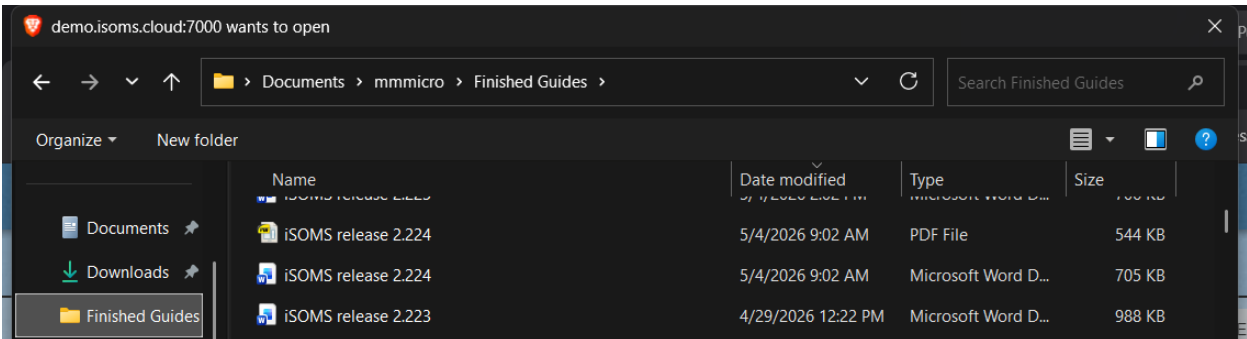
Revised To:
 ADD NOTES ON REVISION CHANGE

Summary:
 ADD SUMMARY OF REVISION HERE

Now click the **Attachments** subheading so you can add the documents that employees will read.



Click **Add Attachment** and add the document from your device that will be with the Notification.





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Attachment Information

File Name: Report Date:

Category: Sub-Category:

Description:

1 Attachment Category:

| Attachment | Entry Date | Category | Sub-Category | File Name | Description | |
|------------|---------------------|----------|--------------|-------------------------------|-------------|--|
| PDF | 05/18/2026 10:27 | | | iSOMS release 2.224.pdf | | |

Add any other attachments you wish to upload for the revision, and then you can proceed to adding notifications for employees.

Now click the **Notifications** subheading. Here you will add notifications so that employees will see the revision and their need to acknowledge it.

Notifications

0 Records

No Records.



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Click **Add Notification** and you will be able to choose which employees to notify of this revision. Employees view revision documents through notifications, so you want to add whatever categories of employees who need to view the revision here.

ADD NOTIFICATION

Notify Employees

| | | | |
|--------------------------------|--|--|----------------------------------|
| Notification Days: | Employment Type: | Sworn: | |
| <input type="text" value="7"/> | <input type="text" value="All"/> <input type="button" value="X"/> <input type="button" value="v"/> | <input type="text" value="All"/> <input type="button" value="X"/> <input type="button" value="v"/> | |
| Major: | <input type="button" value="v"/> | Minor: | <input type="button" value="v"/> |
| Shift: | <input type="button" value="v"/> | | |
| Officer: | <input type="button" value="v"/> | <input type="button" value="Q"/> | |

First, add how many days the notification will be active and viewable in **Notification Days**.

Notification Days:

Choose which groups of employees will see the notifications.

Employment Type (Full Time/Part Time/ All)

Sworn (Yes / No / All)

Major (Corrections / Dispatch / Patrol / Etc.)

Minor (Clerk / Nurse / Mechanic / Etc.)

Shift

Specific **Officer**

| | | | |
|--------------------------------|--|--|----------------------------------|
| Notification Days: | Employment Type: | Sworn: | |
| <input type="text" value="7"/> | <input type="text" value="All"/> <input type="button" value="X"/> <input type="button" value="v"/> | <input type="text" value="All"/> <input type="button" value="X"/> <input type="button" value="v"/> | |
| Major: | <input type="button" value="v"/> | Minor: | <input type="button" value="v"/> |
| ADMIN | <input type="button" value="X"/> <input type="button" value="v"/> | | |
| Shift: | <input type="button" value="v"/> | | |
| Officer: | <input type="button" value="v"/> | <input type="button" value="Q"/> | |



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The selected employee(s) will receive notifications that remind them to view and acknowledge the revision before the **Notification Days** runs out.

IMPORTANT: Only hit **Save** when you are ready to send out the notification because iSOMS will send out the notification immediately on save.

After you send the notification, you will be able to see on the grid who has or has not acknowledged the revision, if you double-click the notification record from the grid.

The screenshot shows a window titled "Employees Notified". At the top left, it says "1 Notification". To the right of this is a button labeled "EXPORT GRID TO FILE". Below this is a table with two columns: "Name" and "Validation Date". The table contains one row with the name "705 SHOREY, HEATHER MICHELLE" and the date "09/29/2025". At the bottom right of the window is a button labeled "CLOSE".

| Name | Validation Date |
|------------------------------|-----------------|
| 705 SHOREY, HEATHER MICHELLE | 09/29/2025 |

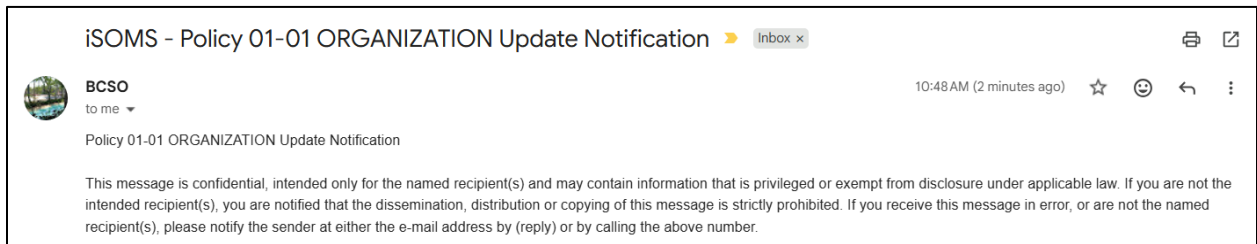


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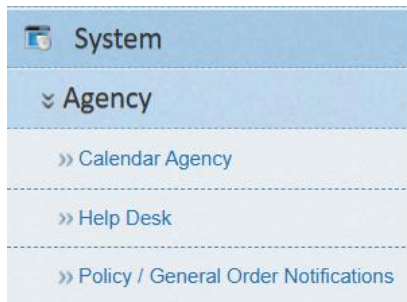
Viewing Notifications

The selected employee(s) will receive email and in-iSOMS notifications that remind them to view and acknowledge the revision before the **Notification Days** runs out.

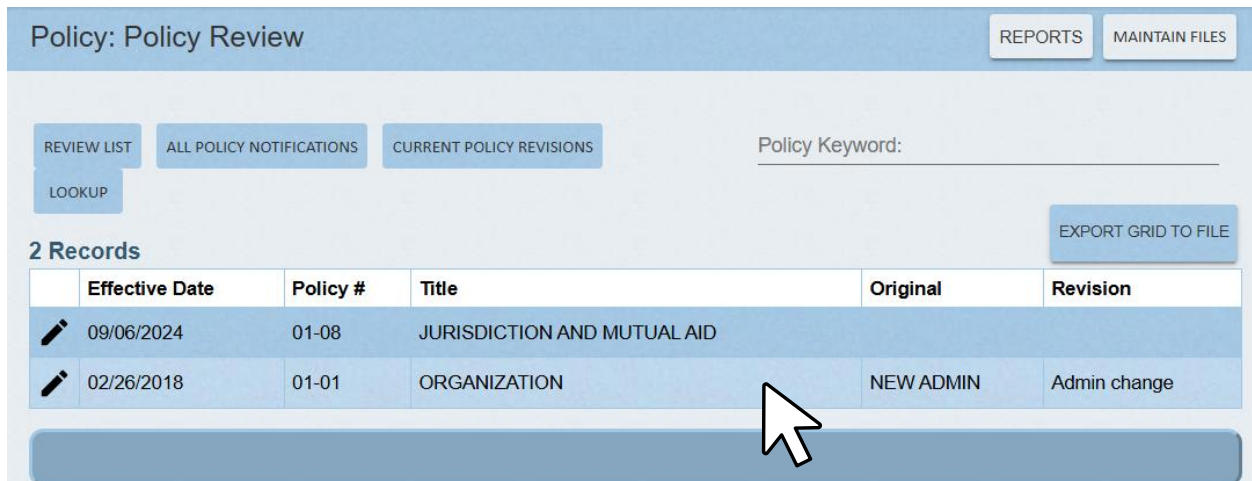
Example Email:



Employees should go to **System → Agency → Policy / General Orders Notifications**.



Here they should double-click the notification on the table, which will open the screen to view the documents uploaded and allow them to acknowledge the policy revisions.





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Policy: View Policy Revision REPORTS MAINTAIN FILES

<< FIRST < PRIOR NEXT > LAST >> SAVE DELETE

POLICY: 01-01 ORGANIZATION Effective Date: 02/26/2018 ACKNOWLEDGE POLICY REVISION



Original:
NEW ADMIN


Revised To:
Admin change

Summary:
Need to speak with your supervisor

Attachments

6 Attachments Category: DOWNLOAD ALL PDFS EXPORT GRID TO FILE

| Attachment | Entry Date | Category | Sub-Category | File Name | Description |
|------------|---------------------|----------|--------------|---|---|
| PDF | 09/29/2025 17:26 | | | Agency - Installing the System Tray.pdf |   |

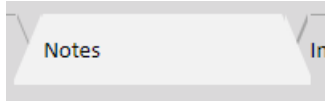
Read the attached documents. (You can click the **Download** icon () to download the files.)

When finished, click **Acknowledge Policy Revision**. This will show up in the Admin view of the Revisions tab as shown in the previous section.



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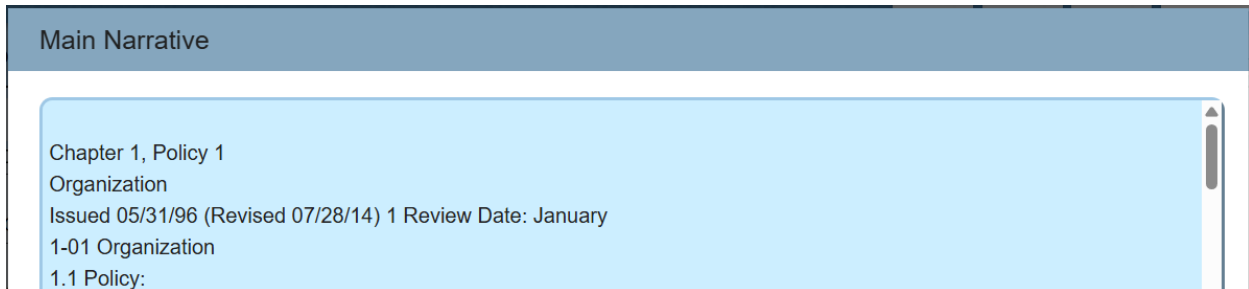
Notes Tab



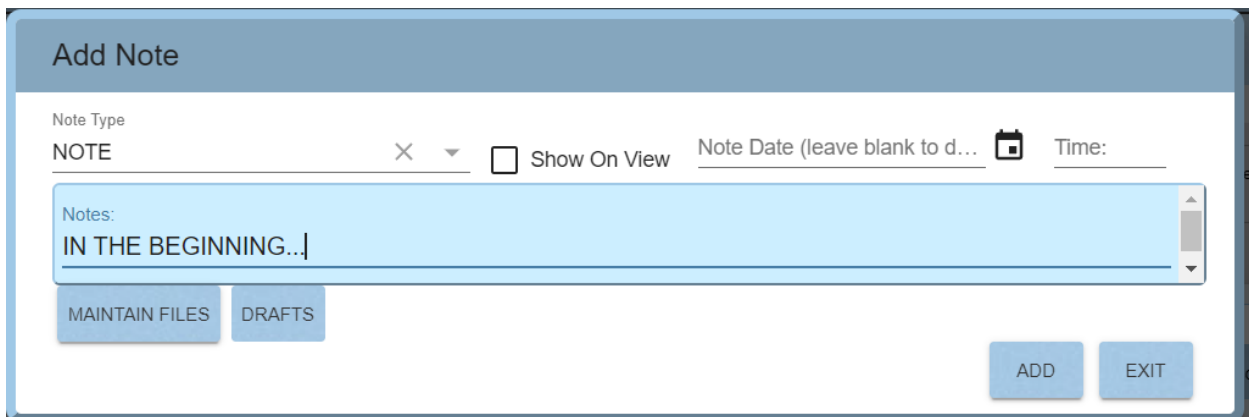
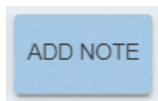
The **Notes** tab is used to view or add notes pertinent to the policy (only super users will be able to see these). Double-click on any entry in the table to edit or view it.



Narrative acts as an area where you can add a long note. This is useful when you want to add important or long form notes that won't be mixed in with the rest of the short notes.



Use **Add Note** to add a new note.





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The **View Story** button will show all notes (except Narrative) that have been added on one page.

VIEW STORY

View Story

07/15/2024 15:35:19 - - MAIN

A NOTE ON NOTES

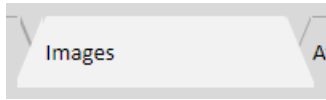
07/15/2024 15:35:28 - - INITIAL CONTACT WITH PICKUP AGENCY

HELLO THERE



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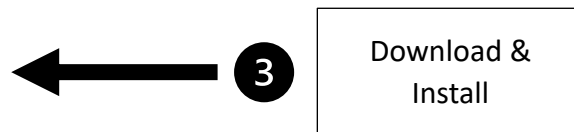
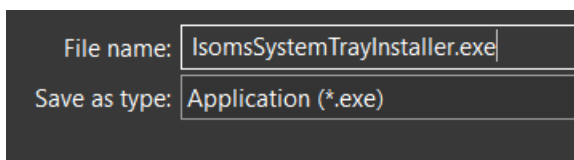
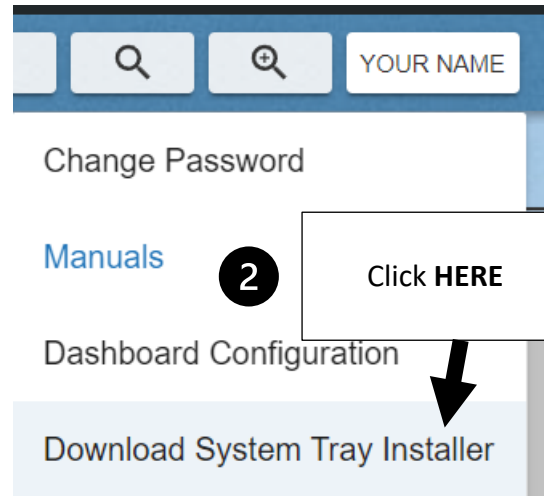
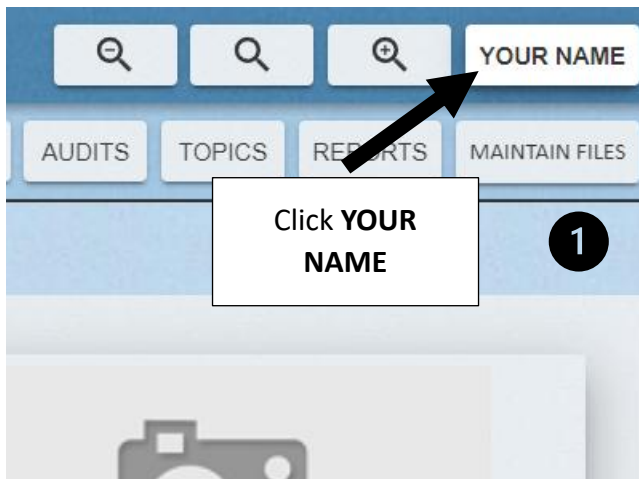
Images Tab



The **Images** tab is used to view, download, or add images. You can add a single image at a time or multiple images at a time. Click **Add Image** to add a single image.



To add multiple images at a time, you will need the System Tray Installer downloaded to the computer you are using. The System Tray Installer can be found on the iSOMS home page by clicking on the button in the upper right with your username. Once you click on that, you will get a drop-down list, and **Download System Tray Installer** is one of the options. Download and install it on this computer.

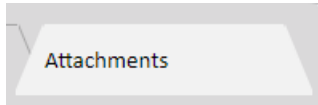



After you have the System Tray Installer on the computer, you can now use the **Add Images** button to upload multiple images at once if necessary.



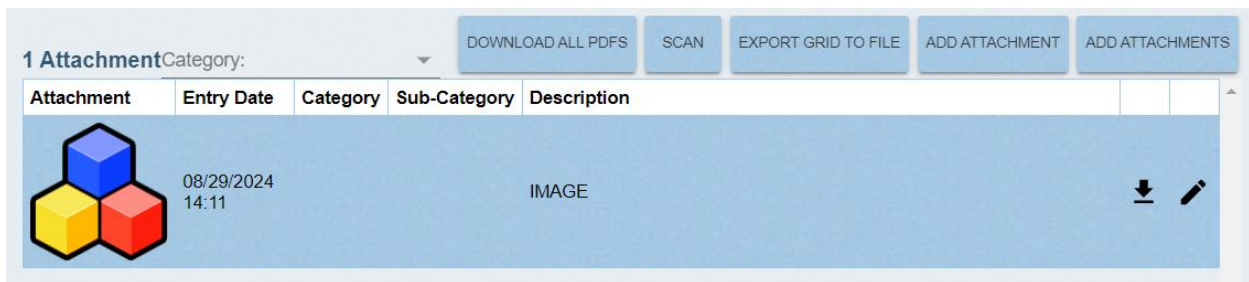
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Attachments Tab



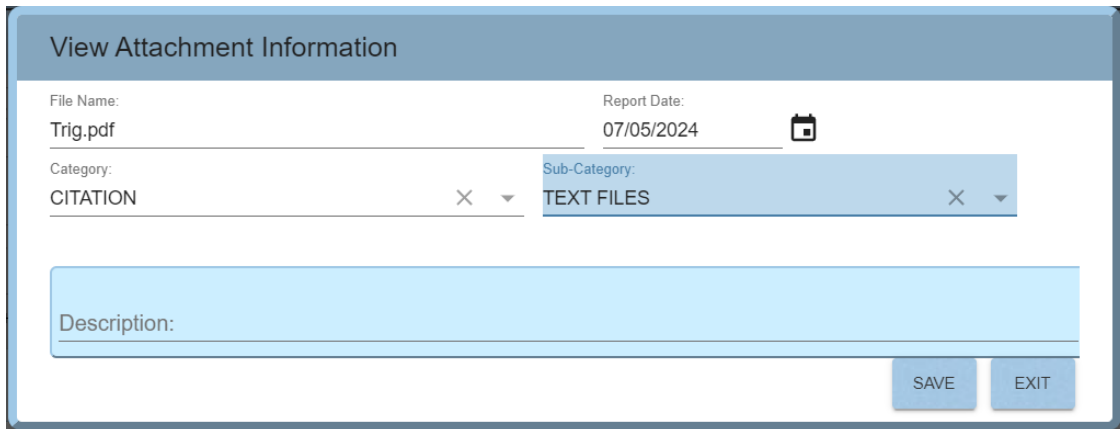
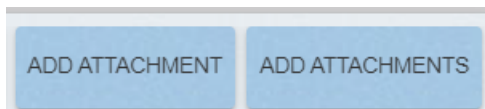
The **Attachments** tab is used to view, download, or add attachments. Double-click a file entry to view the record for the attachment or click on the  icon to download the attachment to the computer.

IMPORTANT: These documents are not shown to Employees through the Notification system.



You can add a single attachment at a time or multiple attachments at a time. Just like above with images, you will need the System Tray Installer downloaded to the computer you are using to add multiple attachments at once. See the *Image* tab instructions on the previous few pages for instructions on installing the System Tray Installer.

Click **Add Attachment** to add a single attachment or click **Add Attachments** to add multiple attachments at the same time. Choose the attachments from the computer, then add the appropriate category and sub-category for the file.





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You can also **Download All PDFs** at once by clicking the appropriate button.

DOWNLOAD ALL PDFS


| | |
|---------------|------------------|
| File name: | files.pdf |
| Save as type: | PDF File (*.pdf) |

If you have the iSOMS Windows App, you can use **Scan** to scan files into the attachments.

SCAN

Scan Attachment

ISOMS Windows App Must Be Running

File Name: _____ Report Date: _____ 

Category: _____ Sub-Category: _____

Description: _____

CANCEL SCAN DUPLEX SCAN AUTO



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Policy Reports

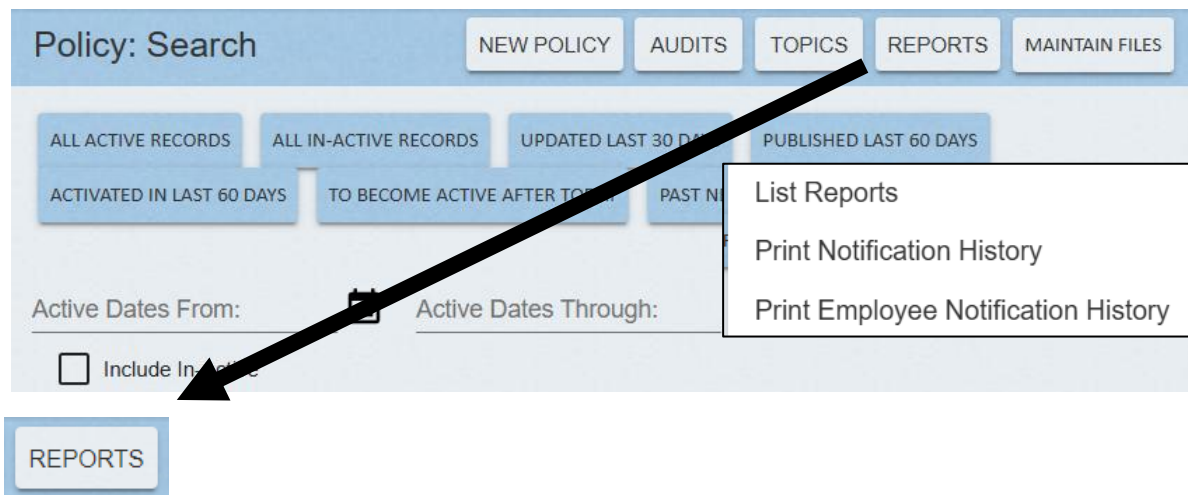
iSOMS has the capability to allow you to print reports for policy records.

To access the reports, begin on the iSOMS home screen. Navigate to:

Admin → **Agency** → **Policy / General Orders**



Now click on the **Reports** button in the upper right corner and select the report you wish to run. Different reports are explained over the next set of pages.





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List Reports

This report displays active or updated policy records in iSOMS over a certain date range. In this way you can see an overview of policy records over your chosen time period. Add the dates in **Dates From** and **Dates Through**.

Report Style has two options: **Active General Orders List** and **Updated General Orders List**. Pick the list you wish to print.

You can choose to sort by **Policy Type** and if you want to **Include Main Note**.

Now, with your chosen parameters, click **View** or **Download** to view the report.



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Report Format:

PDF Excel XML SQL

[VIEW](#) [DOWNLOAD](#) [EMAIL](#) [CLEAR FILTER](#)



YOUR AGENCY
[General Orders List](#)

Policy Start Dates From 09/01/2019 Through 05/31/2026

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| Tracking | General Order Id | Active Date | Title |
|----------|------------------|-------------|-------------|
| POLICY | 360 | 07/07/2021 | DESCRIPTION |
| POLICY | 362 | 06/24/2024 | DESCRIPTION |
| POLICY | 363 | 06/24/2024 | DESCRIPTION |
| POLICY | 364 | 07/15/2024 | DESCRIPTION |
| POLICY | 366 | 08/30/2024 | DESCRIPTION |
| POLICY | 367 | 01/29/2025 | DESCRIPTION |
| POLICY | 368 | 06/10/2025 | DESCRIPTION |
| POLICY | 369 | 06/10/2025 | DESCRIPTION |
| POLICY | 369 | 06/10/2025 | DESCRIPTION |
| POLICY | 370 | 08/21/2025 | DESCRIPTION |
| POLICY | 372 | 04/13/2026 | DESCRIPTION |
| POLICY | 373 | 04/13/2026 | DESCRIPTION |

General Order Count: 12



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Print Notification History Report

This report shows the history of notifications that have been sent out for a *specific* policy record.

First, find the record for which you want to print notification history. Then click **Records** → **Print Notification History** in the upper right.

Policy: Print Notifications History

Report Style
Audit List (Last,First) ▾

Employee: _____ 🔍

All Agencies Exclude Terminated Employees

Verified Record Status:
 Any Status Read Only Un-Read Only

Report Format:
 PDF Excel XML SQL

VIEW DOWNLOAD EMAIL CLEAR FILTER

Choose what you would like included on the report. Click **View** or **Download** to view the report.

VIEW DOWNLOAD



YOUR AGENCY
General Order / Policy Audit

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| Employee Name | Notify Date | Accepted Date | Policy # |
|-----------------------|------------------|------------------|----------|
| ELDER, MARTIN (603) | 09/16/2011 08:45 | 09/16/2011 09:00 | 12-03 |
| SHOREY, HEATHER (705) | 11/26/2025 16:16 | | 12-03 |

Notification Count: 2



Policies and Procedures Guide

Print Employee Notifications History Reports

This report displays notifications sent out in iSOMS over a certain date range. In this way you can see when employees received notifications and if/when they accepted the revisions. Add the dates in **Dates From** and **Dates Through**.

Policy: Print Employee Notifications History

Report Style
Audit List By Name Date

Dates From: 05/01/2026 Dates Through: 05/18/2026

Policy Type:

Major: Minor: Shift:

Employee: Supervisor:

Exclude Terminated Employees Exclude Non-Agency Employees

Verified Record Status:
 Any Status Read Only Un-Read Only

Report Style has various options, all of which are audits sorted by different options.

Pick the list you wish to print.

Audit List By Name Date

Audit List By Major

Audit List By Minor

Audit List By Policy #



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You can choose to sort by **Policy Type**, if you want to narrow by **Major, Minor, Shift**, or even specific **Employee**. You can also limit it to employees with a specific **Supervisor**. Choose any additional parameters such as **Exclude Terminated Employees**.

Policy Type: ▼

Major: ADMIN X ▼ Minor: ▼ Shift: ▼

Employee: ▼ Q

Supervisor: DEMO ISOMS, DEMO X ▼ Q

Exclude Terminated Employees Exclude Non-Agency Employees

Verified Record Status:

Any Status Read Only Un-Read Only

Now, with your chosen parameters, click **View** or **Download** to view the report.

Report Format:

PDF Excel XML SQL



YOUR AGENCY
General Order / Policy Audit
 Policy Notification From 08/01/2017 Through 04/01/2023 Page 1 of 1

| Policy # | Title | Employee | Published | Accepted |
|----------|--------------|----------|------------------|------------------|
| 01-01 | ORGANIZATION | | 02/26/2018 08:00 | |
| 01-01 | ORGANIZATION | | 02/26/2018 08:00 | 02/04/2022 06:44 |
| 01-01 | ORGANIZATION | | 10/22/2018 18:16 | 09/12/2021 07:43 |
| 01-01 | ORGANIZATION | | 04/01/2021 13:47 | 09/12/2021 07:43 |
| 01-01 | ORGANIZATION | | 02/26/2018 08:00 | |
| 01-01 | ORGANIZATION | | 02/26/2018 08:00 | |
| 01-01 | ORGANIZATION | | 10/22/2018 18:16 | |

Count: 7



Policies and Procedures Guide

For More Information

We hope this manual has been helpful to you and your agency.

If you have any questions, don't hesitate to call us at 888-644-5786.

First Revision, May 2026

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