

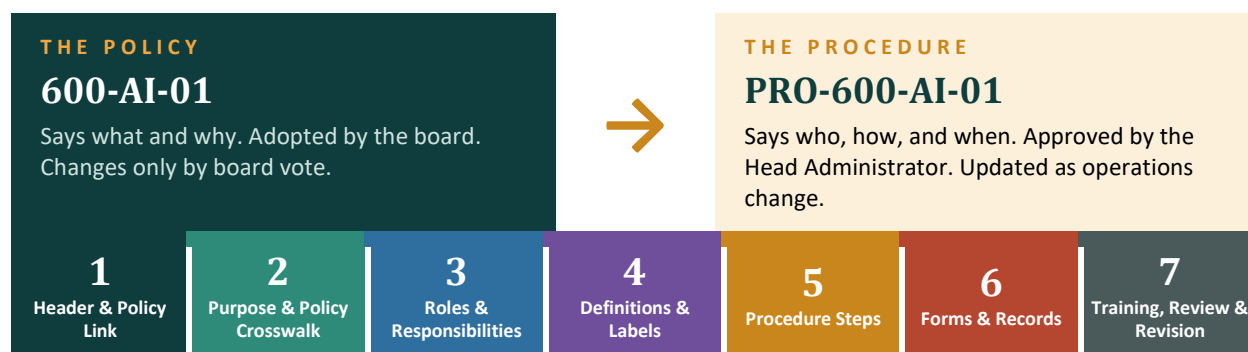


TRAINING HANDOUT | POLICY WITHOUT A POLICY OFFICE

Annotated Sample Procedure

Oakridge Academy | Student AI Use Procedures (PRO-600-AI-01)

How to use this handout. A policy tells staff what must happen. The companion procedure tells them exactly how to do it. This handout uses the same color-coded layout as the annotated policy: each callout explains one part of a well-built procedure, and the framed text shows how Oakridge Academy wrote it. Every step points back to the policy rule it carries out.



Language convention: Prose sections use **shall** for duties and **may** for discretion, as in the policy. Steps use direct action verbs; every step is a duty for the position named beside it. Time limits are in school days.

The seven parts at a glance

Part	Answers the question	How it differs from the policy
1 Header & Policy Link	Which policy does this carry out?	Approved by the administrator, not the board
2 Purpose & Policy Crosswalk	Which steps carry out which policy rules?	A crosswalk replaces the policy's rationale
3 Roles & Responsibilities	Who does what?	Names every position involved
4 Definitions & Labels	What do the labels and time units mean?	Points back to policy definitions; adds working terms
5 Procedure Steps	What happens, in what order, by when?	Numbered steps with a person and a deadline
6 Forms & Records	Which forms, and where are records kept?	Policy lists forms; procedure says how they're used
7 Training, Review & Revision	How are staff trained, and how does this change?	Changes without a board vote; board is informed

ART 1 HEADER & POLICY LINK

What it is: The block that identifies the procedure and ties it to the policy it carries out.

Where it goes: The top of page one, in the same layout as the policy header.

Requirements

- ✓ **Procedure ID** that mirrors the policy ID (600-AI-01 becomes PRO-600-AI-01).
- ✓ **Companion policy:** title and ID, so no one has to guess which policy controls.
- ✓ **Approved by:** the Head Administrator, with a date. The board does not vote on procedures.
- ✓ **Reported to the board:** the meeting where the board was informed.
- ✓ **Effective date:** no earlier than the policy's effective date.
- ✓ **Review date:** the same as the policy's, so they are reviewed together.
- ✓ **Procedure owner:** one position accountable for keeping it current.

Watch out: A procedure that outlives its policy. When a policy is revised, renumbered, or repealed, the procedure has to follow.

OAKRIDGE SAMPLE TEXT

1.0 Procedure Header

OAKRIDGE ACADEMY | ADMINISTRATIVE PROCEDURES

Procedure Title	Student AI Use Procedures
Procedure ID	PRO-600-AI-01
Companion Policy	600-AI-01, Student Acceptable AI Use Policy
Approved By	Head Administrator, July 28, 2026
Reported to Board	August 18, 2026 regular meeting (information item)
Effective Date	August 1, 2026
Last Revised	N/A (new procedure)
Review Cycle	Annual, with Policy 600-AI-01 Next review: June 2027
Procedure Owner	Academic Dean

PART 2 PURPOSE & POLICY CROSSWALK

What it is: One or two sentences on what the procedure carries out, plus a crosswalk showing which steps carry out which policy rules.

Where it goes: Directly after the header.

Requirements

- ✓ Names the policy the procedure implements.
- ✓ States that the policy controls if the two ever conflict.
- ✓ **Crosswalk:** every policy section that requires action maps to at least one step.
- ✓ No new rules. A procedure only explains how to meet the policy.

Watch out: A policy section with no matching step is a rule nobody is assigned to carry out.

OAKRIDGE SAMPLE TEXT

2.0 Purpose

This procedure sets out the steps Oakridge staff follow to carry out Policy 600-AI-01. It does not create new rules. If this procedure and the policy ever conflict, the policy controls.

Policy-to-procedure crosswalk

Policy	Policy requirement	Procedure steps
5.1	AI use only with written instructor permission	5.1, 5.2
5.2	AI Citation required when AI is permitted	5.3
5.3	No protected information in public AI tools	5.4
5.4	Instructor may require oral or handwritten verification	5.5 – 5.7
5.5	Head Administrator adopts procedures	This procedure; 7.1 – 7.3
6.1	Violations handled as academic dishonesty	5.8
6.2	Notice and opportunity to respond	5.9, 5.10
6.4	Students with an IEP or Section 504 plan	5.11
6.3	Range of consequences	5.12, 5.13
7.0	Forms and related resources	6.1 – 6.3

PART 3 ROLES & RESPONSIBILITIES

What it is: A list of every position involved and what each one is responsible for.

Where it goes: After the purpose, before the steps.

Requirements

- ✓ Position titles only, never names; "or designee" where duties can be delegated.
- ✓ One procedure owner who answers for the whole process.
- ✓ Includes people outside the core process who must be consulted (here, the Section 504 Coordinator).
- ✓ Students and families are listed when they have a part to play.
- ✓ Matches what job descriptions actually assign.

Watch out: A step assigned to "staff" or "the school" is a step no one owns.

OAKRIDGE SAMPLE TEXT

3.0 Roles and Responsibilities

Position	Responsibilities under this procedure
Instructor	Labels each assignment's AI Use Level; teaches citation and data rules; reviews submissions; completes Form Tech-B.
Academic Dean (procedure owner)	Sends notices, holds conferences, decides consequences, keeps records, and tracks repeat incidents. Trains staff.
Section 504 Coordinator or case manager	Advises the Academic Dean before any consequence for a student with an IEP or Section 504 plan.
Technology Coordinator	Keeps instructor access to document version history; manages Form Tech-A agreements.
Head Administrator	Approves this procedure and any revisions; reports revisions to the board.
Students and parents	Students follow AI Use Levels and cite AI use. Students and parents sign Form Tech-A.

PART 4 DEFINITIONS & LABELS

What it is: The working terms staff need to follow the steps: references to the policy's definitions, plus labels and units the procedure introduces.

Where it goes: Before the steps.

Requirements

- ✓ Points back to the policy's definitions instead of rewriting them.
- ✓ **Defines the time unit:** school days or calendar days, stated once.
- ✓ Defines any labels the steps rely on, with a plain description of each.
- ✓ Labels work in black and white: a name and number, not color or emoji alone.

Watch out: *Redefining a policy term in the procedure creates two meanings, and the one that helps the other side wins.*

OAKRIDGE SAMPLE TEXT

4.0 Definitions and Labels

4.1 Policy Terms. AI Citation, Generative AI, and Unauthorized Assistance have the meanings given in Policy 600-AI-01, Section 4.0.

4.2 School Day. A day on which students are scheduled to attend. All time limits in this procedure are in school days.

4.3 AI Use Levels. Every assignment carries one of the following labels:

LEVEL 1 AI-Free

No AI use at any stage. All work is the student's own.

LEVEL 2 AI-Assisted

AI may be used for brainstorming, outlining, or editing suggestions. Final writing is the student's own. AI Citation required.

LEVEL 3 AI-Integrated

AI may be used to generate content, data, or code. AI Citation required.

PART 5 PROCEDURE STEPS

What it is: The numbered actions staff take, in the order the work actually happens.

Where it goes: The body of the procedure.

Requirements

- ✓ Grouped into phases that follow the real sequence of work.
- ✓ **Every step has three things:** one action, a responsible position, and a time limit.
- ✓ Starts with an action verb: label, check, log, notify.
- ✓ Each phase names the policy sections it carries out.
- ✓ Cautions are placed where staff judgment matters most.
- ✓ No consequences or obligations the policy doesn't authorize.

Watch out: A step like "the instructor issues a zero" gives a consequence decision to someone the policy didn't authorize. In this policy, consequences belong to the administrator.

OAKRIDGE SAMPLE TEXT | PHASE A

5.0 Procedure Steps

Phase A Before the Assignment

CARRIES OUT POLICY 5.1 – 5.3

Step	Action	Who	When
5.1	Label the assignment Level 1, 2, or 3 on the syllabus and on the assignment instructions.	Instructor	Before the assignment is given
5.2	Treat any unlabeled assignment as Level 1. Correct the label before work begins.	Instructor	As soon as noticed
5.3	Give students the Oakridge AI Citation format for Level 2 and Level 3 work.	Instructor	With the first Level 2 or 3 assignment
5.4	Review the protected-information rule (Policy 5.3) with students.	Instructor	First 10 school days of each semester

Phase B Reviewing a Submission

CARRIES OUT POLICY 5.4

Step	Action	Who	When
5.5	Note specific concerns: a sudden change in style, content not taught, sources that can't be found, or a missing AI Citation.	Instructor	During grading
5.6	Check the document's version history, where available, for large blocks of text pasted in at once.	Instructor	Within 2 school days of noting the concern
5.7	If concerns remain, ask the student to explain the work orally or complete a supervised, handwritten task.	Instructor	Within 3 school days of step 5.6

Caution: AI detection tools are not proof. Never base a finding on a detector score alone; rely on the evidence gathered in steps 5.5 through 5.7.

Phase C Responding to a Violation

CARRIES OUT POLICY 6.1 – 6.4

Step	Action	Who	When
5.8	Log the incident on Form Tech-B, attach the evidence, and send it to the Academic Dean.	Instructor	Within 1 school day of step 5.7
5.9	Notify the student and parent or guardian in writing of the concern and schedule a conference.	Academic Dean	Within 2 school days of receiving Form Tech-B
5.10	Hold the conference. Give the student a chance to respond and record the response on Form Tech-B.	Academic Dean, Instructor	Within 5 school days of the notice
5.11	Check for an IEP or Section 504 plan. If one exists, consult the case manager or Section 504 Coordinator.	Academic Dean	Before any consequence is decided
5.12	Check for prior incidents, choose a consequence from Policy 6.3, and send the written decision to the student and parent.	Academic Dean	Within 3 school days of the conference
5.13	File the completed Form Tech-B in the student's discipline record.	Academic Dean	Same day as the decision

PART 6 FORMS & RECORDS

What it is: A list of every form the procedure uses, who completes it, and how the records are kept and protected.

Where it goes: After the steps.

Requirements

- ✓ Each form has a unique number that matches the policy's list.
- ✓ Says who completes each form and at which step.
- ✓ **Where records are kept** and how long, by reference to the records retention schedule.
- ✓ **Privacy:** who may see the records, consistent with FERPA.
- ✓ Forms are attached or linked so staff can find the current version.

Watch out: *Two forms sharing one number, or a form that exists only in someone's email. Both happen more than you'd think.*

OAKRIDGE SAMPLE TEXT

6.0 Forms and Records

6.1 Forms. Staff **shall** use the current version of each form, posted on the staff portal.

Form	Purpose	Completed by	Kept in
Tech-A: Student Technology Access Agreement	Student and parent acknowledge the AI rules	Student and parent, at enrollment	Student cumulative file
Tech-B: Academic Integrity Log	Records the concern, evidence, conference, and decision	Instructor (5.8); Academic Dean (5.10 – 5.13)	Student discipline record

6.2 Retention. Records **shall** be kept according to the school's records retention schedule.

6.3 Privacy. Form Tech-B is an education record under FERPA. Access is limited to school officials with a legitimate educational interest and to the student's parents or guardians.

PART 7 TRAINING, REVIEW & REVISION

What it is: How staff learn the procedure, how it gets changed, and when it gets reviewed.

Where it goes: The last section of the procedure.

Requirements

- ✓ Who trains staff, and when (new staff and returning staff).
- ✓ Who may revise the procedure, and that the board is informed of changes.
- ✓ Review on the same cycle as the policy.
- ✓ A deadline to update the procedure after the policy changes.

Watch out: Procedures are flexible on purpose, but "flexible" doesn't mean "undocumented." Every revision gets a date.

OAKRIDGE SAMPLE TEXT

7.0 Training, Review, and Revision

7.1 Training. The Academic Dean **shall** train instructional staff on this procedure before each school year and train new instructors within 30 days of hire.

7.2 Revision. The Head Administrator **may** revise this procedure without board action and **shall** report each revision to the board at its next regular meeting.

7.3 Review. This procedure **shall** be reviewed each year with Policy 600-AI-01. If the policy is revised, this procedure **shall** be updated within 30 days.

BEFORE THIS PROCEDURE GOES INTO USE

- ☐ The header names the companion policy, and the review date matches it.
- ☐ Every policy section that requires action appears in the crosswalk.
- ☐ Every step has an action, a position, and a time limit.
- ☐ Nothing in the procedure adds a rule or consequence the policy doesn't authorize.
- ☐ Every form is numbered, current, and posted where staff can find it.
- ☐ Staff have been trained, and the training is documented.
- ☐ The Head Administrator has approved it, and the board has been informed.