November 2016

Xerox® Healthcare Policy Manager
User Guide

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This document supports the Xerox Healthcare Policy Manager 1.0.

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1 Introduction

Within your healthcare organization, you and your colleagues depend on policies and procedures to establish and maintain standards on how various processes are conducted. Admitting patients, processing payments, protecting patient privacy, and administering medication are examples of actions that might be covered by a policy or procedure.

The Xerox® Healthcare Policy Manager solution streamlines the creation, review, approval, and distribution of your healthcare organization's documents. Once distributed, policy and procedure documents are centrally located and managed for quick access to the most current information. With your healthcare organization's documents electronically and securely managed, patient care is improved while noncompliance risks are minimized.

Key features:

- Role-based access control ensures users access only the features needed for their work.
- Create and update policies, procedures, and FAQs from scratch, from templates, or from pre-existing documents; solicit authoring support from subject matter experts.
- Workflows route the policy or procedure for review and approval before the document is distributed for acknowlegement.
- Manage workflows by reassigning, stopping, and resuming tasks.
- Real-time dashboards provide a quick view of the status of policy and procedure documents as well as when they are due for updating.
- Reports help to monitor in-progress and overdue tasks as well as compliance.
- Search features facilitate finding policies and procedures quickly.

Healthcare Policy Manager roles

Xerox® Healthcare Policy Manager provides the following roles for managing the life cycle of policies and procedures:

- **Policy Coordinators**—Users responsible for assigning roles to users and managing document tasks.
- **Authors**—Users responsible for setting up the document structure, assigning stakeholders to document tasks, and writing and updating policy and procedure documents before they are sent to the review board.

  In addition, users in other roles can be assigned to co-author policy and procedure documents.
- **Review Board**—Users responsible for setting up the document structure, assigning stakeholders to document tasks, and optionally writing and updating policy and procedure documents. They also review and provide input on policy and procedure documents before they are sent for approval as well as monitor the document life cycle.

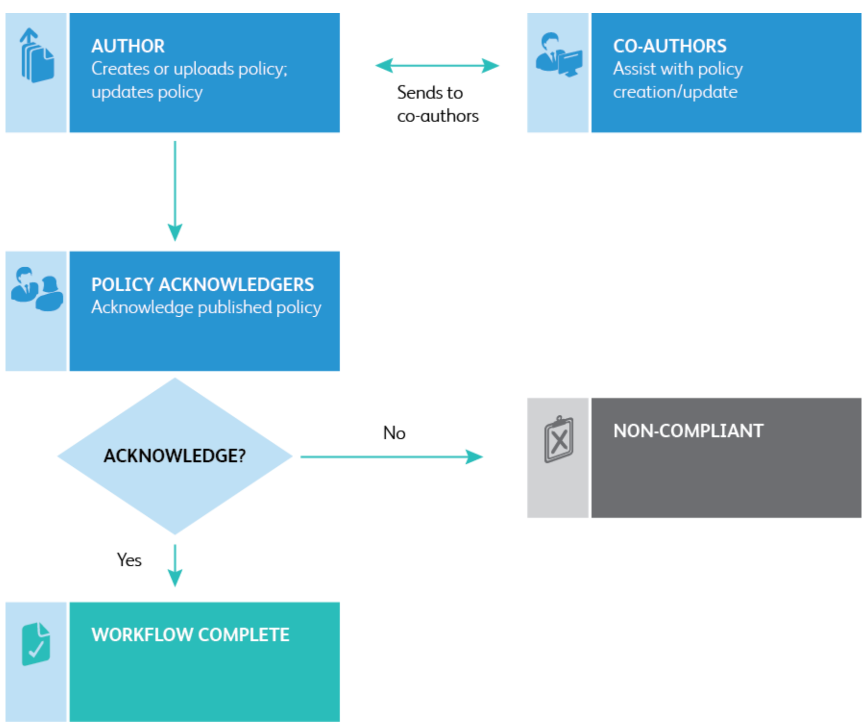
- **Approval Committee**—Users responsible for approving policy and procedure documents prior to publication. They also view the level of compliance to policy and procedure documents.
- **Policy Acknowledgers**—Users who refer to published policies and procedures in their day-to-day work and must acknowledge receipt of the documents.
- **Policy Guests**—Users who refer to published documents in their day-to-day work, but are not required to acknowledge receipt of the documents.

Product packages and capabilities

Healthcare Policy Manager is available in three packages: Essential Package, Review Package, and Compliance Package. Depending on the package your organization purchased, different Policy Manager roles and capabilities are available.

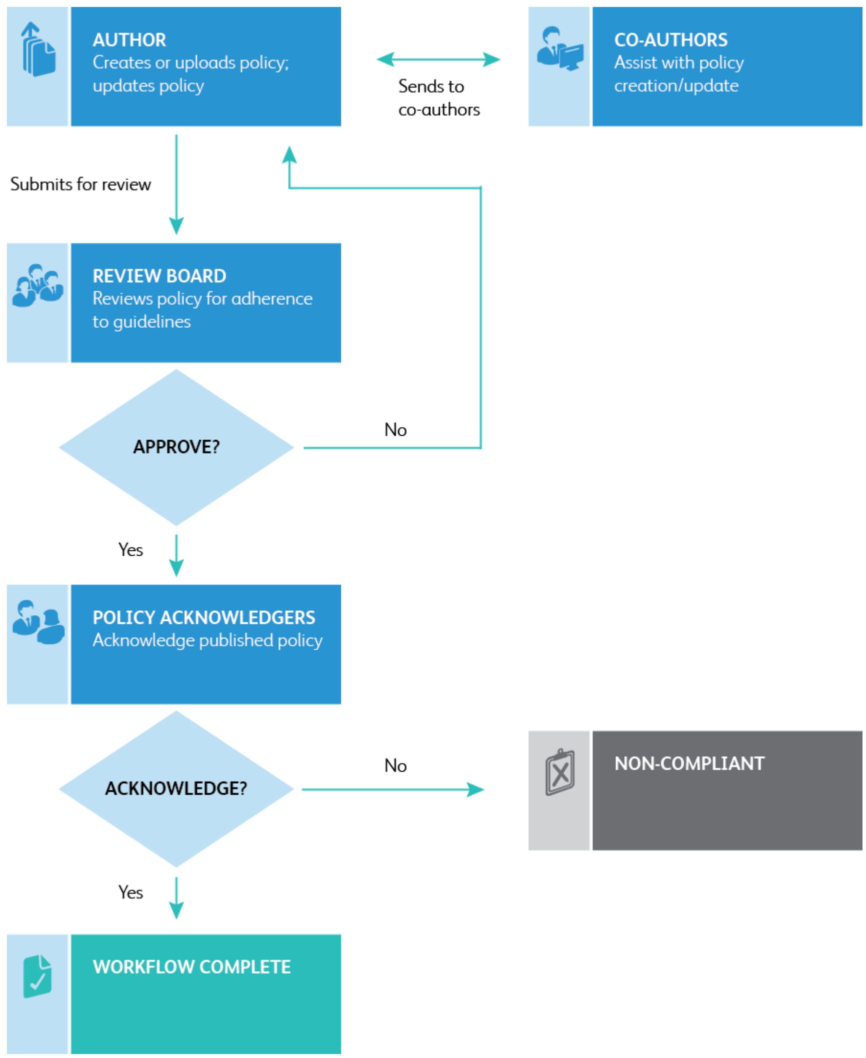
Essential Package

The Essential Package includes these roles: Policy Coordinators, Authors, and Policy Acknowledgers. Policy Guests are optional. With this package, you can write policy and procedure documents and have the published documents acknowledged.



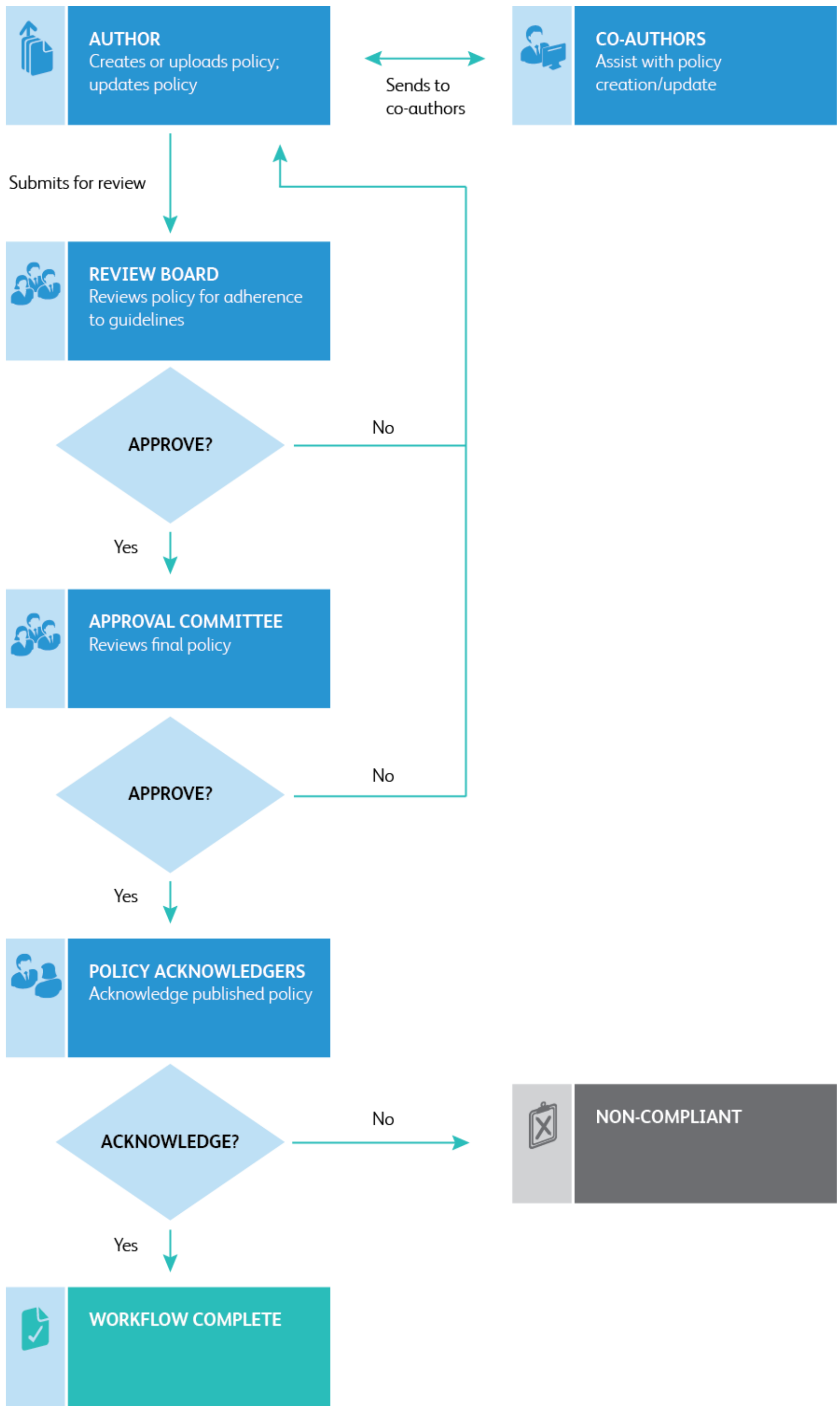
Review Package

The Review Package includes these roles: Policy Coordinators, Authors, Review Board, and Policy Acknowledgers. Policy Guests are optional. With this package, you can write policy and procedure documents, send them to a review group, and then have the published documents acknowledged.



Compliance Package

The Compliance Package includes these roles: Policy Coordinators, Authors, Review Board, Approval Committee, and Policy Acknowledgers. Policy Guests are optional. With this package, you can write policy and procedure documents and then send them to a review group and an approval committee before the published documents are acknowledged.



Terms

The following terms are used in the Healthcare Policy Manager interface and guide.

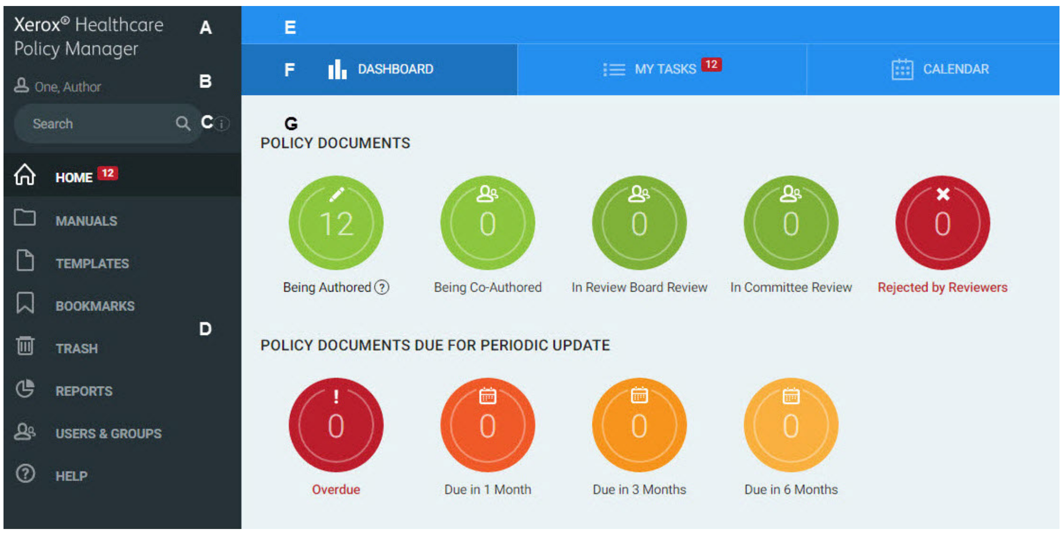
Term	Definition
Archive folder	Stores policies and procedures for compliance reference. An archive folder is located in each manual and section folder.
Bookmark	A link to a frequently accessed document or manual, or to other content.
Drafts folder	Stores draft policies and procedures that require review and approval. A drafts folder is located in each manual and section folder.
Draft FAQ	An FAQ document currently in the authoring stage.
Draft policy or procedure	A policy or procedure currently in the authoring, review, or approval stage.
Manual	Stores a collection of published policies and procedures for a department, such as Pharmacy or Emergency. It also contains these folders: archive folder, drafts folder, and templates folder.
Published FAQ	A PDF version of the distributed FAQ. Published FAQs appear in a manual.
Published policy or procedure	A PDF version of the approved and distributed policy or procedure. Published policies and procedures appear in a manual.
Section	A group of related policies and procedures in a manual. For example, sections in the Pharmacy manual could be Administration, Drug Distribution, and Inventory.
Stakeholder	Any of the following roles: Authors, Review Board, and Policy Acknowledgers.
Templates folder	Stores document templates that authors can use to draft policies and procedures for the manual. The templates folder is located in the manuals folder.

The user interface

2

Xerox® Healthcare Policy Manager is a web-based solution. Therefore, you use a web browser and the provided URL to access the solution.

After accessing the solution, the home page displays. What you see on the home page depends on your role. However, your home page should look similar to the example shown below.



The home page includes these features:

A. Vertical navigation bar

B. Username—when clicked, displays your user settings

C. Search box

D. Links to pages

E. Page heading—includes the page title, navigation links, and tabs

F. Tabs—when clicked, display page information

G. Page display area

Navigate the solution

Using the navigation bar and tabs, you can easily access the page you need.

Depending on your role, you see several or all of these links on the navigation bar:

- **Home**—Your primary work area.

- **Manuals**—The top-level set of manuals. Each manual contains policy, procedure, and FAQ documents.
- **Templates**—The templates available for creating policy, procedure, and FAQ documents.
- **Bookmarks**—Your bookmarked documents, manuals, and other content.
- **Trash**—Your deleted content.
- **Reports**—Information about overdue, in progress, and compliant policy documents, as well as historical data.
- **Users & Groups**—User and group management area.
- **Help**—The guides available with the solution.

The home page

The home page displays several tabs. The ones you see depend on your role.

Note: Policy Guests have a unique home page that displays published documents.

Role	Dashboard tab	My Tasks tab	Acknowlegement tab	Calendar tab
Policy Coordinators	X	X		X
Authors	X	X		X
Review Board	X	X		X
Approval Committee		X		
Policy Acknowledgers			X	

Dashboard page

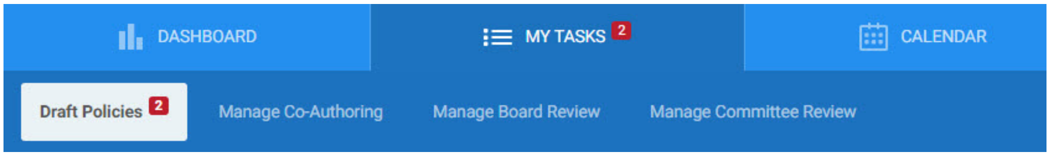
The Dashboard page, shown on the previous page, provides a visual overview of the number of policy, procedure, and FAQ documents that are in each stage of the development process.

Policy Coordinators, Authors, and the Review Board use the page to get more information about a document in each stage. Authors and Review Board members view the number of documents for which they are responsible. Policy Coordinators view all of the documents in all stages of development.

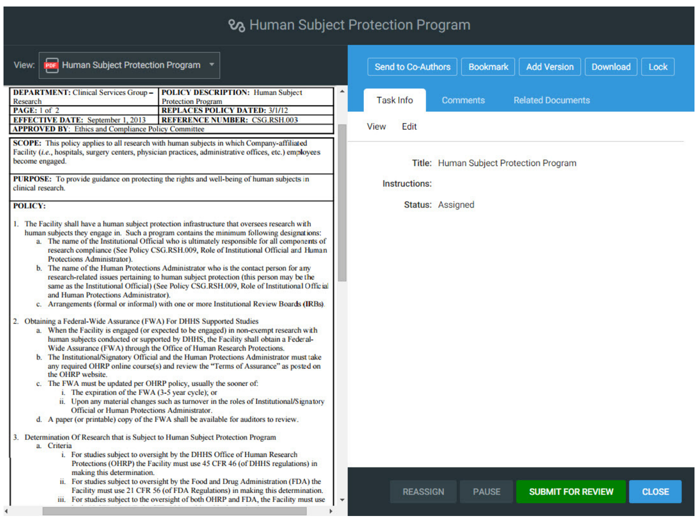
Also displayed on the Dashboard page is information regarding documents that are due to be updated, grouped by the date that the update is due.

My Tasks page

The My Tasks page shows the types, or queues, of tasks that are assigned to you. A task tally appears after each task type. For information on how to use the My Tasks page, see Manage tasks on page 36.



When you click a document task listed on the My Tasks page, the document and information about it display in the task viewer, as shown below.



Acknowledgement page

The Acknowledgement page displays the documents that you need to read and acknowledge. In most cases, you will receive an email to review and acknowledge a document; the email will include a link to this page.

Calendar page

You use the Calendar page to manage the documents that are due to be updated.

User settings

Your user settings include your first and last names, username, and time zone. You can change your time zone, if necessary. The time zone appears on pages that display detailed date information.

To change your user settings:

1. On the navigation bar, click your username.
2. From the **Time Zone** menu, select your time zone.
3. Click **Save**.

3 Document organization

You structure your healthcare organization's policy, procedure, and FAQ documents within **manuals**. These manuals correspond to business units or departments within your organization. Examples might include:

- Administration
- Emergency
- Intensive Care
- Nursing
- Radiology

You can divide a manual into **sections**, and further divide sections into subsections. Using a nursing manual as an example, this manual might have sections on:

- Ambulatory care
- Cardiology
- Dialysis
- Neonatal
- Surgery

You then add policy, procedure, FAQ, and template documents to manuals and manual sections.

Add manuals

If you are a Policy Coordinator, an Author, or a Review Board member, then you can add manuals. When you add a manual, you can specify the default review period for documents added to the manual and the default users who are to author documents at the next review period. You can also select the users who are to review and acknowledge all policy and procedure documents added to the manual.

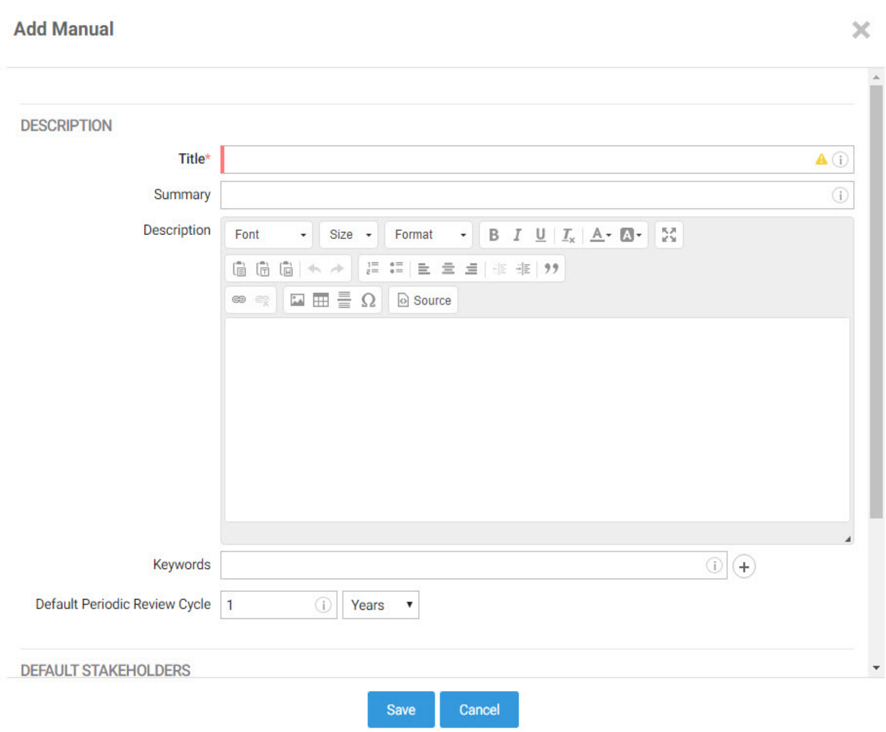
After adding a manual, three folders are created in it:

- **Archive**—The folder where published documents get archived.
- **Drafts**—The folder where authors add draft documents.
- **Templates**—The folder where templates for draft documents are stored.

Add a new manual

To add a manual:

1. On the navigation bar, click the **Manuals** link.
2. Click the **Add Manual** button. The Add Manual window is displayed.



3. Type the name of your new manual in the **Title** field.

   Optionally, you can add a summary and keywords. You can also add these later.
4. In the **Default Periodic Review Cycle** field, enter a number and then select a unit of time: **Days**, **Months**, or **Years**. This sets the length of time until the next review cycle for all policies and procedures added to the manual.

5. For **Acknowledgers**, select the users who are to acknowledge all policies and procedures added to the manual. These users must be assigned the Policy Acknowledgers role.
    a. Click **Select users**.
    b. Type the name of the user in the search box.
    c. To narrow your search, click **Options**. Use **Show Object Type** to specify **User** or **Group**. From the **Search In** list, select the name of the field to be searched. Click **Options** to close the Options tab.
    d. Click **Search**.
    e. Click the plus sign next to a name to assign the user as an acknowledger.
    f. Click the **Done** button at the top of the window.
6. For **Authors**, select the users who will update all policies and procedures added to the manual at the scheduled review cycles. These users must be assigned the Authors role
    a. Click **Select authors**.
    b. Type the name of the user in the search box.
    c. To narrow your search, click **Options**. Use **Show Object Type** to specify **User** or **Group**. From the **Search In** list, select the name of the field to be searched. Click **Options** to close the Options tab.
    d. Click **Search**.
    e. Click the plus sign next to a name to assign the user as an author.
    f. Click the **Done** button at the top of the window.
7. For **Review Board**, select the users who are to review all policies and procedures added to the manual. These users must be assigned the Review Board role
    a. Click **Select members**.
    b. Type the name of the user in the search box.
    c. To narrow your search, click **Options**. Use **Show Object Type** to specify **User** or **Group**. From the **Search In** list, select the name of the field to be searched. Click **Options** to close the Options tab.
    d. Click **Search**.
    e. Click the plus sign next to a name to assign the user as a review board member.
    f. Click the **Done** button at the top of the window.
8. Click **Save**.

Add a section to a manual

You add sections to create more structure to the manual. After adding a section, a drafts folder and an archive folder are created in it.

To add a section:

1. On the navigation bar, click **Manuals**.
2. From the list of manuals, click the title of the manual you want to add a section to.
3. Click **Add Section**.
4. In the Add Section window, type the title of the new section. Optionally, you can add a summary and keywords.
5. Click **Save**.

Edit manuals

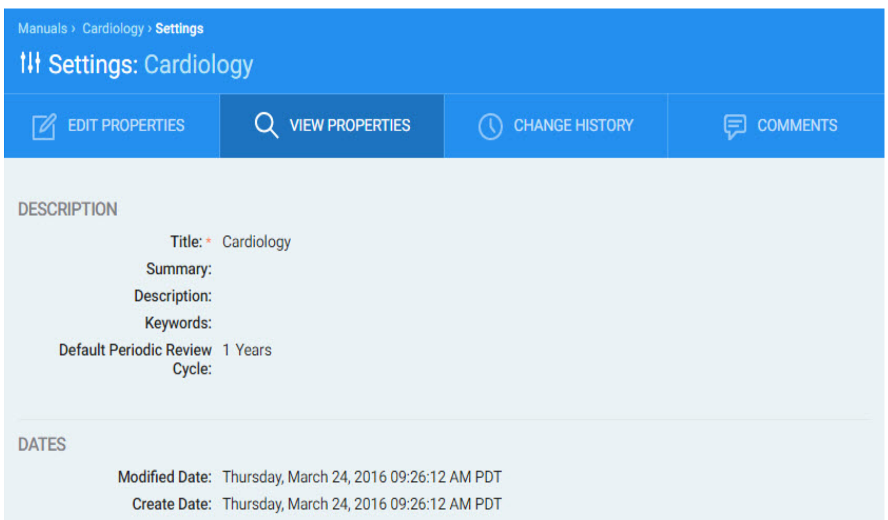
If you are a Policy Coordinator, an Author, or a Review Board member, then you can edit manuals.

View and edit manual properties

From the manual's Settings page, you can view and edit manual properties, view the history of changes to the manual, and add comments.

To view and edit properties:

1. On the navigation bar, click **Manuals**.
2. From the list of manuals, locate the manual whose properties you want to view and edit.
3. From the manual's **More Actions** menu, select **Settings**.



4. Click the **Edit Properties** tab and change the properties you want.
5. Click **Save**.

To view the change history, see View change history on page 20. To add comments, see Add comments on page 19.

Change the stakeholders

You can change the stakeholders (acknowledgers, authors, review board members) after the manual is created.

1. On the navigation bar, click **Manuals** and then locate the manual whose stakeholders you want to change.
2. Do one of the following:
   - From the manual's **More Actions** menu, select **Change Stakeholders**.
   - Click the manual title and then click the **Change Stakeholders** icon.

The Change Stakeholders window is displayed.

3. To change the acknowledgers, do the following:

   a. Next to **Acknowledgers**, click **Select users**.

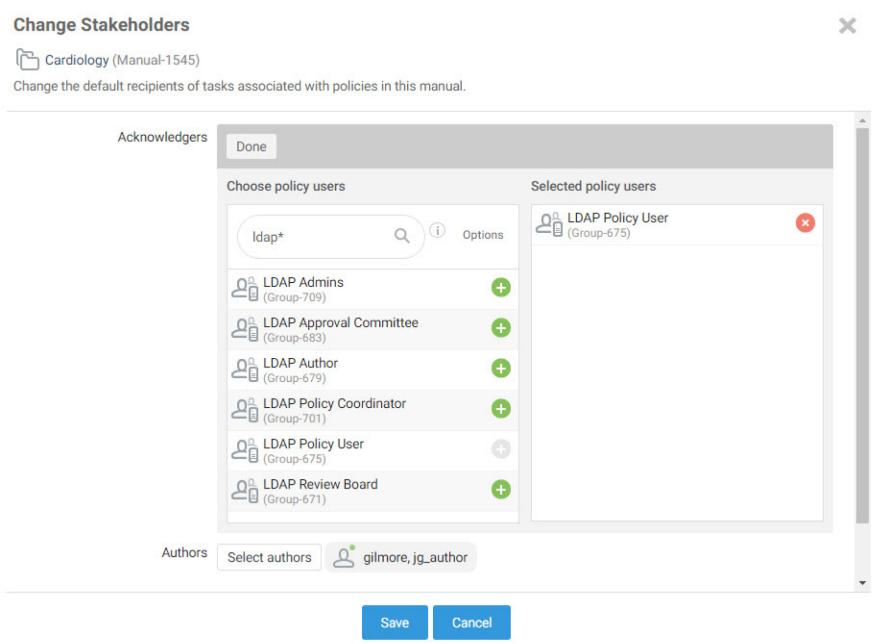
   b. Type the name of the acknowledger you want to assign in the search box.

   c. To narrow your search, click **Options**. Use **Show Object Type** to specify **User** or **Group**. From the **Search In** list, select the name of the field to be searched. Click **Options** to close the Options tab.

   d. Click **Search**.

   e. Click the plus sign next to a name to assign the user as an acknowledger. The user must be assigned the Policy Acknowledgers role.

   f. Click the **Done** button at the top of the window.



4. To change the authors, do the following:

   a. Next to **Authors**, click **Select authors**.

   b. Type the name of the author you want to assign in the search box.

   c. To narrow your search, click **Options**. Use **Show Object Type** to specify **User** or **Group**. From the **Search In** list, select the name of the field to be searched. Click **Options** to close the Options tab.

   d. Click **Search**.

   e. Click the plus sign next to a name to assign the user as an author. The user must be assigned the Authors role.

   f. Click the **Done** button at the top of the window.

5. To change the review board members, do the following:

   a. Next to **Review Board**, click **Select members**.

   b. Type the name of the member you want to assign in the search box.

c. To narrow your search, click **Options**. Use **Show Object Type** to specify **User** or **Group**. From the **Search In** list, select the name of the field to be searched. Click **Options** to close the Options tab.

d. Click **Search**.

e. Click the plus sign next to a name to assign the user as a review board member. The user must be assigned the Review Board role.

f. Click the **Done** button at the top of the window.

6. Click **Save**.

Rename a manual

1. On the navigation bar, click **Manuals and** then locate the manual you want to rename.
2. Do one of the following:
   - From the manual's **More Actions** menu, select **Rename/Summarize**.
   - Click the manual title and then select the **Rename/Summarize** from the **More Actions** menu.
3. In the **Title** field, enter a new name for the manual. Optionally, add or change the summary.
4. Click **Save**.

Change the owner

1. On the navigation bar, click **Manuals** and then locate the manual whose owner you want to change.
2. Do one of the following:
   - From the manual's **More Actions** menu, select **Change Owner**.
   - Click the manual title and then select the **Change Owner** from the **More Actions** menu.
3. Click **Options**. From the **Search In** list, select the name of the field to be searched. Click **Options** to close the Options window.
4. Enter the search term and then click **Search**.
5. Click the arrow next to the user to assign as the object owner.
6. Click **Save**.

Add comments

1. On the navigation bar, click **Manuals** and then locate the manual to which you want to add comments.
2. Do one of the following:
   - From the manual's **More Actions** menu, select **Settings**.
   - Click the manual title and then click the **Settings** icon.
3. Click the **Comments** tab.

4. Type your comments and click **Post Comment**.

View change history

1. On the navigation bar, click **Manuals** and then locate the manual whose change history you want to view.
2. Do one of the following:
   - From the manual's **More Actions** menu, select **Settings**.
   - Click the manual title and then click the **Settings** icon.
3. Click the **Change History** tab.
4. In the Change History window, you can narrow the events by:
   - Selecting the specific events by clicking **Selected Events**.
   - Selecting the user by clicking **Choose**.
   - Selecting the time span by specifying the start and end dates of the history.
5. Click **Download Results**.

   The change history is downloaded in a spreadsheet called **activityHistory.csv**.

Delete a manual

If the manual includes draft or published policy and procedure documents, then you must be a Policy Coordinator to delete the manual.

1. On the navigation bar, click **Manuals** and then locate the manual you want to delete.
2. Do one of the following:
   - From the manual's **More Actions** menu, select **Delete**.
   - Click the manual title and then select the **Delete** from the **More Actions** menu.

   The manual and its contents are sent to the trash. Depending on the size of the manual, deletion can take some time.

Templates

Templates are documents used as the basis of a new policy, procedure, or FAQ document. Before beginning to work on a new document, authors can download a template file and then modify it.

Add a template

When you add a manual, a folder for templates is created. Adding templates to this folder is a simple process.

To add a template:

1. On the navigation bar, click **Manuals**.
2. From the list of manuals, locate the manual to which you want to add the template.
3. Click the **Templates** folder.
4. Click **Add Document**.
5. In the Add Document window, click the **Choose File** or **Browse** button.
6. Locate the template file on your computer. Click **Open**.
7. Type the title of the template or click the **User Filename** button.

   The other fields are optional.
8. Click the **Add** button.

Template actions

After adding a template, there are many actions you can perform.

Check out a template

You check out a template to download and edit it.

1. From the template's **More Actions** menu, select **Checkout (Download & Lock)**.
2. Save the template to a location on your computer.
3. Make the changes you want and save the template.
4. To upload the updated template and replace the previous version, see Add a new version on page 21.

Add a new version

If you need to update a template, you can add a new version of it.

1. From the template's **More Actions** menu, select **Add Version**.
2. Click **Choose File** or **Browse**. Navigate to the new version of the document.
3. Click **Open**. The filename of the selected file is displayed.

4. Enter the version description. The version description informs other users about the changes that have been made in this version of the template.
5. Select the **Make Preferred** checkbox to make this version the preferred version of the template.
6. Update the document summary if required. To use the current version description as the document summary, click the **Use Version Description** checkbox.
7. Click **Add**. The new template version is uploaded.

View change history

1. From the template's **More Actions** menu, select **Settings**.
2. Click the **Change History** tab.
3. In the Change History window, you can narrow the events by:
   – Selecting the specific events by clicking **Selected Events**.
   – Selecting the user by clicking **Choose**.
   – Selecting the time span by specifying the start and end dates of the history.
4. Click **Download Results**.

   The change history is downloaded in a spreadsheet called **activityHistory.csv**.

Bookmark a template

1. From the template's **More Actions** menu, select **Bookmark**.

   The template is added to your bookmarks.

Change the owner

1. From the template's **More Actions** menu, select **Change Owner**.
2. Click **Options**. From the **Search In** list, select the name of the field to be searched. Click **Options** to close the Options window.
3. Enter the search terms and then click **Search**.
4. Click the arrow next to the user to assign as the object owner.
5. Click **Save**.

Email a template

1. From the template's **More Actions** menu, select **Email**.
2. Enter the email addresses of the recipients in the **To:**, **CC:** and **BCC:** fields. If multiple addresses are entered in a single field, separate each address with a semicolon.
3. Click the **Remember addresses** checkbox to store the email addresses for use again.
4. Click the **Send copy to me** checkbox to receive a copy of the email.
5. Enter a subject for the email in the **Subject** field.
6. Type the email message in the **Body** field.

Use the editing tools to format the body text, create numbered and bulleted lists, and add links, graphics, or tables.

7. To format the email body text as HTML click the **Format Text as HTML** checkbox. To format text as plain text, ensure the box is unchecked.
8. Click the **Send / Attachment** option required:
   - **Send object as an attachment**—Includes the selected template as an attachment to the email.
   - **Send object as a link**—Places a link to the selected template after the body text within the email.
   - **Send object as a single compressed archive**—Compresses the template into a zip file and includes the zip file as an attachment to the email.
9. Click **Send**. A confirmation message is displayed.

Edit template properties

1. From the template's **More Actions** menu, select **Settings**.
2. Change the properties you want.
3. Click **Save**.

Rename a template

1. From the template's **More Actions** menu, select **Rename/Summarize**.
2. In the **Title** field, enter a new name for the manual. Optionally, add or change the summary.
3. Click **Save**.

Delete a template

1. From the template's **More Actions** menu, select **Delete**.

   The template is sent to the trash.

Lock a template

1. From the template's **More Actions** menu, select **Lock**.

   The **Lock** icon is displayed on the document's **Type** icon.
2. To unlock the template, select **Unlock from the Actions** menu.

Add comments

1. From the template's **More Actions** menu, select **Comments**.
2. Type your comments and click **Post Comment**.

4

Policies, procedures, and FAQs

This chapter explains how to draft, publish, and archive policies, procedures, and FAQs.

Policies and procedures

One or more authors are tasked with drafting policy and procedure documents. Once a draft is complete, it goes through a review and approval process before it is published. If the draft document is rejected during the process, the author is notified via email and the document returns to the author's tasks.

Add a draft policy or procedure

If you are a Policy Coordinator, an Author, or a Review Board member, you can add draft policies and procedures to manuals and sections. A manual is set up with default stakeholders. You can change any of the stakeholders when you add a draft.

To add a draft document:

1. On the navigation bar, click **Manuals**.
2. Locate the manual or manual section to which you want to add a draft document.
3. Click the manual or section title and then the **Drafts** folder.
4. Do one of the following:
   – Click the **Add Policy** button.
   – Click the **Add Procedure** button.
5. Click the **Choose File** button.
6. Locate the draft document on your computer. Click **Open**.

   Note: You can select a Microsoft Word document only.

7. Type the title of the document in the **Title** field or click the **Use Filename** button.
8. Specify the following under **Timeframes**:
   a. **Periodic Review Cycle**—The frequency at which the document should be reviewed.
   b. **Next Review Date**—The date on which to add the document to the author's tasks for review and update.
9. Under **Author, do the following:**
   a. Add instructions.

   b. Select a **Due date**.
   c. To change or select the author:
      - Click the **Select author** button.
      - Type the name of a user in the search box.
      - To narrow your search, click **Options**. From the **Search In** list, select the name of the user property to search. Click **Options** to close the Options panel.
      - Click **Search**.
      - Click the plus sign next to a name to assign the user as an author.
      - Click the **Done** button at the top of the window.

10. Under **Review & Approve**, do the following:
   a. Add instructions.
   b. Select a **Due date**.
   c. To change or select the review board members:
      - Click the **Select review board members** button.
      - Type the name of a user or group in the search box.
      - To narrow your search, click **Options**. Use **Show Object Type** to specify **User** or **Group**. From the **Search In** list, select the name of the property to search. Click **Options** to close the Options panel.
      - Click **Search**.
      - Click the plus sign next to a name to assign the user or group to the review board.
      - Click the **Done** button at the top of the window.

11. Under **Approve & Publish**, do the following:
   a. Add instructions.
   b. Select a **Due date**.
   c. To change or select the approval committee members:
      - Click the **Select approval committee members** button.
      - Type the name of a user or group in the search box.
      - To narrow your search, click **Options**. Use **Show Object Type** to specify **User** or **Group**. From the **Search In** list, select the name of the property to search. Click **Options** to close the Options panel.
      - Click **Search**.
      - Click the plus sign next to a name to assign the user or group to the approval committee.
      - Click the **Done** button at the top of the window.

12. Under **Acknowledge**, do the following:
   a. Add instructions.
   b. Select a **Due date**.

c. To change or select the acknowledgers:
   - Click the **Select policy acknowledgers** or **Select procedure acknowledgers** button.
   - Type the name of a user or group in the search box.
   - To narrow your search, click **Options**. Use **Show Object Type** to specify **User** or **Group**. From the **Search In** list, select the name of the property to search. Click **Options** to close the Options panel.
   - Click **Search**.
   - Click the plus sign next to a name to assign the user or group as an acknowledger.
   - Click the **Done** button at the top of the window.

13. Click the **Save** button.

    The author receives an email notification and the draft document is added to the author's tasks.

Send a draft document to co-authors

If you are the author assigned to draft the document, you can select other users to help co-author the draft. The users you select can be assigned any Policy Manager role except Policy Acknowledgers.

To send a document to co-authors:

1. On the navigation bar, click **Home** and then click **My Tasks**.
2. Click **Draft Policies** and then locate and click the title of the document that you want to send to co-authors.

   The document opens in the task viewer.
3. Click the **Send to Co-Authors** button.
4. Provide any instructions and a due date.
5. To select co-authors, do the following:

   a. Type the name of a user or group in the search box.

   b. To narrow your search, click **Options**. Use **Show Object Type** to specify **User** or **Group**. From the **Search In** list, select the name of the property to search. Click **Options** to close the Options panel.

   c. Click **Search**.

   d. Click the plus sign next to a name to assign the user or group as a co-author.

   e. Click the **Send** button.

   The co-author receives an email notification and the draft document is added to the co-author's tasks

Edit a draft document

You might want to edit a document during the draft creation phase. In addition, you need to edit a document after a review board or approval committee member rejects the draft.

To edit a document:

1. On the navigation bar, click **Home** and then click **My Tasks**.
2. Click **Draft Policies** and then locate and click the title of the document that you want to edit.

   The document opens in the task viewer.
3. Click the **Download** button.
4. Save the document to a location on your computer.
5. Edit and save the document.
6. Return to **My Tasks**.
7. Locate and click the title of the document that you edited.
8. Click the **Add Version** button.
9. In the Add Version window, do the following:
   a. Enter the version description. The version description informs other users about the changes that have been made in this version of the template.
   b. Select the **Make Preferred** checkbox to make this version the preferred version of the template.
   c. Update the document summary if required. To use the current version description as the document summary, click the **Use Version Description** checkbox.
   d. Click **Add**. The new version is uploaded.
10. If the document is ready for review, click the **Submit for Review** button.
11. Click the **Close** button.

Submit a document for review

Once the draft document is complete, you send it to the review board.

To submit a document for review:

1. On the navigation bar, click **Home** and then click **My Tasks**.
2. Click **Draft Policies** and then locate and click the title of the document that you want to submit for review.

   The document opens in the task viewer.
3. Click the **Submit for Review** button.

   The Task Info indicates the status is completed.
4. Click the **Close** button.

Review a policy or procedure

If you are a member of the review board, it is your responsibility to review draft documents. Only one member of the review board must approve a document before it is sent to the approval committee.

To review a document:

1. Do one of the following:
   - In the email you received, click the task link.
   - On the navigation bar, click **Home** and then click **My Tasks**.
2. Click **Review Draft Policies** and then locate and click the title of the document that you need to review.

   The document opens in the task viewer.
3. Click the **Acquire** button.

   The document is removed from the task list of other review board members.
4. Click the **Comments** tab, add an optional comment, and click **Post Comment**.
5. Do one of the following:
   - Click the **Approve** button. The document is sent to the approval committee.
   - Click the **Reject** button. The document is returned to the author.
6. Click the **Close** button.

Approve a policy or procedure

If you are a member of the approval committee, it is your responsibility to approve draft documents. Only one member of the approval committee must approve a document before it is published.

To approve a document:

1. Do one of the following:
   - In the email you received, click the task link.
   - On the navigation bar, click **Home**.
2. Locate and click the title of the document that you need to approve.

   The document opens in the task viewer.
3. Click the **Acquire** button.

   The document is removed from the task list of other approval committee members.
4. Click the **Comments** tab, add an optional comment, and click **Post Comment**.
5. Do one of the following:
   - Click the **Approve** button. The published PDF version of the document is added to the manual or section. The Word document remains in the drafts folder.
   - Click the **Reject** button. The document is returned to the author.
6. Click the **Close** button.

Acknowledge a policy or procedure

If you are a policy acknowledger, it is your responsibility to read and acknowledge policy and procedure documents.

To acknowledge a document:

1. Do one of the following:
   – In the email you received, click the task link.
   – On the navigation bar, click **Home**.
2. Locate and click the title of the document that you need to acknowledge.

   The document opens in the task viewer.
3. Read the document and click the **Acknowledge** button.
4. Click the **Close** button.

FAQs

If you are a Policy Coordinator, an Author, or a Review Board member, you can add draft FAQs to manuals. FAQ documents do not need to be reviewed, approved, and acknowledged.

Add a draft FAQ

To add a draft FAQ:

1. On the navigation bar, click **Manuals**.
2. Locate the manual or manual section to which you want to add a draft document.
3. Click the manual or section title and then the **Drafts** folder.
4. Click the **Add FAQ** button.
5. Click the **Choose File** button.
6. Locate the draft document on your computer. Click **Open**.

   Note: **You can select a Microsoft Word document only.**
7. Type the title of the document in the **Title** field or click the **Use Filename** button.
8. Under **Author**, do the following:
   a. Add instructions.
   b. Select a **Due date**.
   c. To change or select the author:
      - Click the **Select author** button.
      - Type the name of a user in the search box.
      - To narrow your search, click **Options**. From the **Search In** list, select the name of the user property to search. Click **Options** to close the Options panel.
      - Click **Search**.
      - Click the plus sign next to a name to assign the user as an author.
      - Click the **Done** button at the top of the window.
9. Click the **Save** button.

   The draft document is added to the author's tasks. If you are an author, you can send the draft to a co-author (see Send a draft document to co-authors on page 26) and edit the draft (Edit a draft document on page 26).

Publish an FAQ

To publish an FAQ:

1. On the navigation bar, click **Home** and then click **My Tasks**.
2. Click **Draft Policies** and then locate and click the title of the FAQ that you need to publish.

   The document opens in the task viewer.

3. Click the **Publish** button.
4. Click the **Close** button.

   The published PDF version of the FAQ is added to the manual or section. The Word document remains in the drafts folder.

Document actions

Depending on your role, there are additional actions you can perform when viewing a policy, procedure, or FAQ in the task viewer or a manual.

Add comments

1. Do one of the following:
   – Locate the document in your tasks and then click its title to open it in the task viewer. Click the **Comments** tab.
   – Locate the document in a manual and then select **Comments** from the **More Actions** menu.
2. Type your comments and click **Post Comment**.

Link related documents

You can create links between related documents to more easily locate all of the documents from one page. For instance, you might want to link one or more procedures that relate to a single policy document.

To link related documents:

1. Do one of the following:
   – Locate the document in your tasks and then click its title to open it in the task viewer.
   – Locate the document in a manual and then select **Settings** from the **More Actions** menu.
2. Click the **Related Documents** tab.

   If the document is related to any other documents, they are displayed on the page.
3. Click **Manage Related Documents**.
4. Do the following to select a document:
   a. Type the name of a document in the search box.
   b. To narrow your search, click **Options**. From the **Search In** list, select the name of the property to search. Click **Options** to close the Options panel.
   c. Click **Search**.
   d. Click the plus sign next to the document you want to link.
   e. Click **Save**.

   The documents are now related.

Bookmark the document

1. Do one of the following:
   - Locate the document in your tasks and then click its title to open it in the task viewer. Click the **Bookmark** button.
   - Locate the document in a manual and then select **Bookmark** from the **More Actions** menu.

   The document is added to your bookmarks.

Add a new version

You can add a new version of a document before it is published.

1. Do one of the following:
   - Locate the document in your tasks and then click its title to open it in the task viewer.
   - Locate the document in a manual and then select **Versions** from the **More Actions** menu.
2. Click the **Add Version** button.
3. Click **Choose File**. Navigate to the new version of the document.
4. Click **Open**. The filename of the selected file is displayed.
5. Enter the version description. The version description informs other users about the changes that have been made in this version of the document.
6. Select the **Make Preferred** checkbox to make this version the preferred version of the document.
7. Update the document summary if required. To use the current version description as the document summary, click the **Use Version Description** checkbox.
8. Click **Add**. The new document version is uploaded.

Download the document

1. Locate the document in your tasks and then click its title to open it in the task viewer.
2. Click the **Download** button.
3. Save the document to a location on your computer.

Lock and unlock the document

1. Locate the document in your tasks and then click its title to open it in the task viewer.
2. Click the **Lock** button.

   The **Lock** icon is displayed on the document's **Type** icon when viewing the document in a drafts folder.
3. To unlock the document, return to the task viewer and click the **Unlock** button.

Change the owner

You can change the owner of published documents.

1. Locate the published document in a manual and then select **Change Owner** from the **More Actions** menu.
2. Click **Options**. From the **Search In** list, select the name of the field to be searched. Click **Options** to close the Options window.
3. Enter the search terms and then click **Search**.
4. Click the arrow next to the user to assign as the object owner.
5. Click **Save**.

Email a document

1. Locate the document in a manual and then select **Email** from the **More Actions** menu.
2. Enter the email addresses of the recipients in the **To:**, **CC:** and **BCC:** fields. If multiple addresses are entered in a single field, separate each address with a semicolon.
3. Click the **Remember addresses** checkbox to store the email addresses for use again.
4. Click the **Send copy to me** checkbox to receive a copy of the email.
5. Enter a subject for the email in the **Subject** field.
6. Type the email message in the **Body** field.

   Use the editing tools to format the body text, create numbered and bulleted lists, and add links, graphics, or tables.
7. To format the email body text as HTML click the **Format Text as HTML** checkbox. To format text as plain text, ensure the box is unchecked.
8. Click the **Send / Attachment** option required:
   – **Send object as an attachment**—Includes the selected template as an attachment to the email.
   – **Send object as a link**—Places a link to the selected template after the body text within the email.
   – **Send object as a single compressed archive**—Compresses the template into a zip file and includes the zip file as an attachment to the email.
9. Click **Send**. A confirmation message is displayed.

Move a document

1. Locate the document in a manual and then select **Move** from the **More Actions** menu.
2. Click **Options**. Use **Show Object Type** to specify **Manual** or **Section**. From the **Search In** list, select the name of the field to be searched. Click **Options** to close the Options window.
3. Enter the search terms and then click **Search**.
4. Click the arrow next to the manual or section that you want to move the document to.
5. Click **Move**.

Edit document properties

1. Locate the document in a manual and then select **Settings** from the **More Actions** menu.
2. Click the **Edit Properties** tab.
3. Change the properties you want.
4. Click **Save**.

Rename a document

1. Locate the document in a manual and then select **Rename/Summarize** from the **More Actions** menu.
2. In the **Title** field, enter a new name for the manual. Optionally, add or change the summary.
3. Click **Save**.

View change history

1. Locate the document in a manual and then select **Settings** from the **More Actions** menu.
2. Click the **Change History** tab.
3. In the Change History window, you can narrow the events by:
   - Selecting the specific events by clicking **Selected Events**.
   - Selecting the user by clicking **Choose**.
   - Selecting the time span by specifying the start and end dates of the history.
4. Click **Download Results**.

   The change history is downloaded in a spreadsheet called **activityHistory.csv**.

Archive documents

If you are a Policy Coordinator, an Author, or a Review Board member, you can archive published policy, procedure, and FAQ documents when they no longer need to be accessed. Once archived, a document is not included in reports or overviews and is not subject to periodic review.

To archive a published document:

1. On the navigation bar, click **Manuals**.
2. Locate and click the manual or manual section that contains the published document that you want to archive.

   Note: You can also archive a published document from your Bookmarks.

3. From the document's **More Actions** menu, select **Archive**.

   The document is moved to the archive folder in the manual or section.

Un-Archive documents

If needed, you can un-archive a document to move it to its original location so it is accessible again.

To un-archive an archived document:

1. On the navigation bar, click **Manuals**.
2. Locate the manual or manual section that contains the published document that you want to un-archive.
3. Click the manual or section title and then the **Archive** folder.
4. From the document's **More Actions** menu, select **Un-Archive**.

   The document is moved to the manual or section.

Archived document actions

In addition to un-archiving an archived document, you can do the following:

- Bookmark it. See Bookmark the document on page 32.
- Email it. See Email a document on page 33.
- Edit properties. See Edit document properties on page 34.
- Add comments. See Add comments on page 31.
- Link related documents. See Link related documents on page 31.

5 Manage tasks

The My Tasks page shows all of the tasks associated with publishing policy and procedure documents, from draft creation to approval. Depending on your role, the sub-tabs you see on the page vary, as shown in the table below.

Sub-tab	Policy Coordinators	Authors	Review Board	Approval Committee	Policy Acknowledgers
Draft Policies		X	X		
Co-Author Policies	If co-author	If co-author	If co-author		
Review Draft Policies			X		
Review Draft Policies for Publication				X	
Acknowledgement					X
Manage Authoring	X				
Manage Co-Authoring	X	X	X		
Manage Board Review	X	X	X		
Manage Committee Review	X	X	X		
Manage Acknowledgement	X				

View your tasks

To view your tasks:

1. On the navigation bar, click **Home** and then click **My Tasks**.
2. Click a sub-tab to view the list of tasks:
   - **Draft Policies**—View document authoring tasks.
   - **Co-Author Policies**—View document co-authoring tasks.
   - **Review Draft Policies**—View document review tasks.
   - **Review Draft Policies for Publication**—View document approval tasks.
   - **Acknowledgement**—View document acknowledgement tasks.
   - **Manage Authoring**—View and manage all authoring tasks.

- **Manage Co-Authoring**—View and manage the co-authoring tasks. Authors and Review Board members view the tasks they sent to co-authors. Policy Coordinators view all co-authoring tasks.
- **Manage Board Review**—View and manage the tasks in the review phase. Authors and Review Board members view the tasks for the documents they drafted. Policy Coordinators view all tasks.
- **Manage Committee Review**—View and manage the tasks in the approval phase. Authors and Review Board members view the tasks for the documents they drafted. Policy coordinators view all tasks.
- **Manage Acknowledgement**—View and manage all acknowledgement tasks.

3. To view the tasks by status, select a status from the **Status** menu:
    - **Any Open Status**— Show all incomplete tasks.
    - **Available**—Show tasks that are available to be acquired, such as review tasks.
    - **Assigned**—Show tasks that are assigned to users.
    - **Completed**—Show completed tasks.
    - **On Hold**—Show tasks that users have paused.
    - **Acquired**—Show tasks that review board members have acquired.
4. Click a task title to view it in the task viewer.

Task actions

Depending on your role, Policy Coordinators, Authors, or Review Board, you can select one or more tasks and perform the actions described in the table below. The actions appear in the **Selected Actions** menu and under **Actions**.

Action	Description
Settings	Display the task properties and change history.
Acquire	Assign the task to yourself. This removes the task from the task list of other recipients.
Release	Remove the task from your task list. This allows the task to be acquired by other recipients.
Reassign	Select different stakeholders for an assigned task. You can reassign acquired tasks.
Pause	Pause the task, which prevents stakeholders from completing the task.
Resume	Resume a paused task, which allows stakeholders to complete the task.
Restart	Restart the task. If the task was acquired or completed, it is restarted.
Cancel	Cancel the task and remove it from the tasks of all assigned stakeholders.
Flag	Flag the task as important.

Action	Description
Remove Flag	Remove the task flag.
Submit for Review	Submit the completed document draft to the review board.

In addition, see Document actions on page 31 for the actions you can perform within the task viewer.

Change view settings

You can change the columns displayed on the page to provide more information about the tasks.

To change the view settings:

1. Click the **Show View Settings** icon.
2. To customize which columns are displayed in the view, select the column title from the **Available** list and click the **left arrow** to add the title to the **Selected** list. Click the **right arrow** to remove a selected title from the **Selected** list.
3. The order of column titles in the **Selected** list determines the left-to-right position of the columns in the view; the column title at the top of the list will be the furthest left. Select the column title and use the controls below the **Selected** list to change the order of the columns:
   – Use the two **single arrows** to move the selected column title up or down one place in the list.
   – Use the two **double arrows** to move the selected column title to the top or bottom of the list.
4. Under **Other Options**, select additional view options as required:
   – **Paging Size**—From the menu, select how many tasks to display on the page.
   – **Primary and Secondary Sort**—From the menus, select the primary and secondary columns to sort by and if they will be sorted in ascending or descending order. For example, if you select **Create Date** and **Ascending** from the **Primary Sort** menus and then select **Task Currently With** and **Ascending** from the **Secondary Sort** menus, the tasks will be sorted first by the create date (most recent first) and then alphabetically by the name of the person working on the task.
   – **Show in groups**—Click the checkbox to group objects in the view. Objects will only be shown in groups when sorted by the type or date property. Groups can be expanded and collapsed by clicking the + or - button next to the group name.
5. Click **Save**.

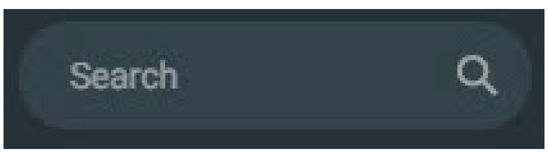
6

Find and bookmark content

The search feature enables you to quickly find needed content, such as policies, procedures, and manuals. Healthcare Policy Manager indexes and stores information, or properties, about the content in a database. For documents (policies, procedures, FAQs), Healthcare Policy Manager also stores its content. A search checks the database to find the content that matches your search terms.

Healthcare Policy Manager uses a process called stemming to find content that contain variations of the word you specify. For example, a search for the word **nurse** will find **nurse** as well as other forms of the word: **nurses**, **nursing**, and **nursed**.

A search box is available at the top of the navigation bar on every page. It allows you to quickly search for content.



Search overview

There are several ways to search in order to find just the policy, procedure, or FAQ that you need.

Search	Search term example	Search will find:	Search will ***not*** find:
Find content with the search word (not case sensitive)	hospital (no special format)	hospital, Hospital, hospitals, Hospitals	N/A
Find content with the exact search word (case sensitive)	~doctor (precede search word with a tilde symbol)	doctor, doctors	Doctor
Find content with the exact search phrase.	“clinic hours” (enclose phrase in quotation marks)	clinic hours, Clinic Hours	clinical, clinic records
Find content that includes multiple search words or phrases.	infection control program (no special format)	Employees receive a annual in-service program on infection control...	N/A

Use reserved characters in a search

You can use these wildcard characters when building a search:

- Question mark (**?**): Represents any **single** alphanumeric character.

  Example: ?an returns ban, can, fan, etc. but not than.

- Asterisk (*****): Represents **any number** of alphanumeric characters in one word.

  Example: corp* returns corporal, corporate, corporation, etc.

Note: The ampersand (**&**), at sign (**@**), dash (**-**), and underscore (**_**) are considered alphanumeric characters and do not require any special treatment. For example, to search for a policy titled **After-Hours Visitors**, type `After-Hours Visitors`.

Run a search

To perform a search:

1. On the navigation bar, type your search term in the **Search** box.
2. Click .

   The search results display.

See the following section, Update a search, for ways to narrow your search results.

Update a search

On the Search Results page, there are several ways you can narrow the search. Each method is described in this section. You can also change how search results are displayed.

Narrow the search using search operators

At the top of the Search Results page, you can select from any number of properties and find documents that either contain or do not contain the search terms. You can also combine search terms.

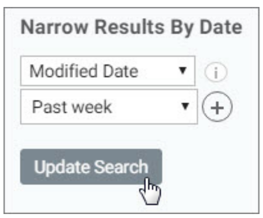
To use search operators:

1. On the Search Results page, use the first menu to select the type of content or property. You can leave it set to **Any Content or Property** or select a particular property.

2. Use the second menu to either include (**contains**) or exclude (**does not contain**) your search term.
3. Enter your search term in the box.
4. Use the third menu to combine search terms:
   a. Select **And** to find content that contains all of the search terms. Select **Or** to find content that contains just one of two or more search terms.
   b. Click the plus (**+**) and specify the additional search term.
5. Click the **Update Search** button.

Narrow results by date

If you need to further refine the search results, you can use the **Narrow Results by Date** options to find content on a specific date or within a specific date range. You can search using several date properties (create date, expiration date, modified date, and trashed date) and you can combine date search terms.



To use dates:

1. In the **Narrow Results By Date** section, use the first menu to select one of the date properties and the second menu to select a date or date range.
2. Click the plus (**+**) to add additional search terms.
3. Click the **Update Search** button.

Filter by type

You can narrow the search by specifying the content type.

To search by type:

1. Click **Custom selection**.
2. Select one or more content types.
3. Click the **Update Search** button.

Change how search results are displayed

The search results are shown in a column listing. You can sort the results by column by clicking any of the column titles.

You can change the columns displayed along with other options.

To change the view settings:

1. Click the **Show View Settings** icon.
2. To customize which columns are displayed in the view, select the column title from the **Available** list and click the **left arrow** to add the title to the **Selected** list. Click the **right arrow** to remove a selected title from the **Selected** list.
3. The order of column titles in the **Selected** list determines the left-to-right position of the columns in the view; the column title at the top of the list will be the furthest left. Select the column title and use the controls below the **Selected** list to change the order of the columns:
   - Use the two **single arrows** to move the selected column title up or down one place in the list.
   - Use the two **double arrows** to move the selected column title to the top or bottom of the list.
4. Under **Other Options**, select additional view options as required:
   - **Paging Size**—From the menu, select how many objects to display on the page.
   - **Primary and Secondary Sort**—From the menus, select the primary and secondary columns to sort by and if they will be sorted in ascending or descending order. For example, if you select **Create Date** and **Ascending** from the **Primary Sort** menus and then select **Due Date** and **Ascending** from the **Secondary Sort** menus, the objects will be sorted first by the create date (most recent first) and then by the due date.
   - **Show in groups**—Click the checkbox to group objects in the view. Objects will only be shown in groups when sorted by the type or date property. Groups can be expanded and collapsed by clicking the + or - button next to the group name.
5. Click **Save**.

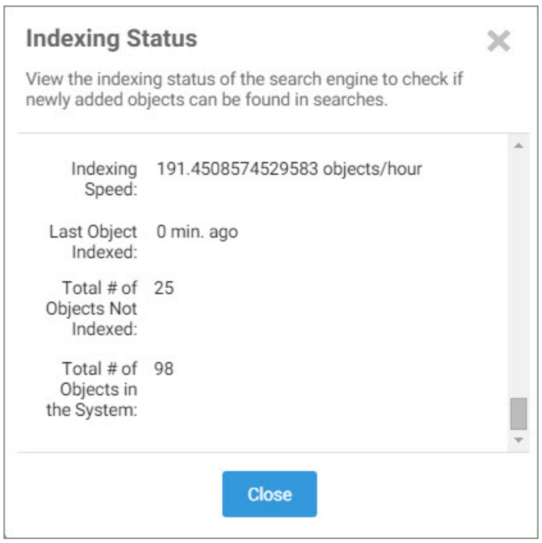
View indexing status

When documents added to the system do not display in search results, it is because the search engine has not yet indexed them. You can check the status of indexed objects.

To view the indexing status:

1. On the page heading, click the **Indexing Status** icon .

   The Indexing Status window shows the indexing speed, when content was last indexed, the amount of content that still needs to be indexed, and the total number of objects in the system.

2. Click **Close** after viewing the status.

Bookmark content

To access frequently used content from a single location, you can add them to Bookmarks. Any content you add as a bookmark is a link to the original content, not a copy.

If the original content is deleted, it will no longer display in bookmarks.

Bookmark content

To add content to bookmarks:

1. Use search or browse to locate the content that you want to add to bookmarks.
2. From the **More Actions** menu, select **Bookmark**. A confirmation message is displayed when the action is complete.

View bookmarks

To view your bookmarks:

1. On the navigation bar, click **Bookmarks**.

   The Bookmarks page is displayed. The bookmarks are grouped by type of content: manuals, sections, and documents. The bookmark groups can be collapsed by clicking (**–**) and expanded by clicking (**+**).

   The default view displays the **Type**, **Title & Summary**, **Owner**, **Modified Date**, **Size**, and **Actions** columns.
2. Click the **Show View Settings** icon to open the **View Settings** pane.
3. Change the view settings, See Change how search results are displayed on page 42.
4. Click **Save**.

Remove a bookmark

To remove a bookmark:

1. From the navigation bar, click **Bookmarks**.

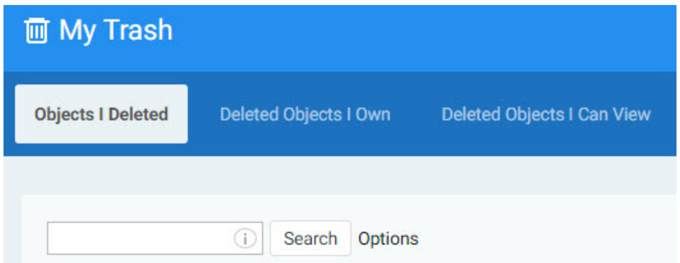
   The Bookmarks page is displayed.
2. Locate the object that you want to remove.
3. From the **More Actions** menu, select **Remove Bookmark**. A confirmation message is displayed when the action is complete.

   The content is no longer displayed in bookmarks, but is still available in its original location.

Manage trash

7

Your trash holds the content you delete, the content you own that other users delete, and deleted content that you can view. When you open your trash, this content is split among three tabbed pages: **Objects I Deleted**, **Deleted Objects I Own,** and **Deleted Objects I Can View**.



The layout and the options available on each tabbed page are exactly the same. You can access the content on each page and permanently delete it. You can also restore the content, provided it has not been permanently deleted from the site. By default, trashed content is permanently deleted after 90 days.

Permanently delete content

When content you own is deleted by you or another user it is placed in your personal trash. If the content is no longer needed, you can permanently delete it from the site.

To permanently delete content:

1. On the navigation bar, click **Trash**.

   The My Trash page is displayed.

2. Click the tab you want.

3. Do one of the following:

   – Locate the content that you want to delete.

   – To search for specific content, enter a word or phrase in the **Search** box and click **Search**.

   Note: To narrow your search, click Options. From the Within Property menu, select the name of the property to search. Then click Search.

4. Do one of the following:

   – To delete one object, click the **Delete Permanently** icon in the object's Actions area.

   – To delete multiple objects, click the checkbox next to each object and select **Permanently Delete Selected** from the **Selected Actions** menu.

5. In the Expunge window, click **Delete Permanently**. A confirmation message is displayed when the action is complete.

Restore deleted content

When an object item you own is deleted by you or another user, it is placed in your trash. If the object is still required or was deleted in error, in most cases it can be restored.

Note: **If an object cannot be restored, the Restore action icon will be grayed out with a rollover message stating the reason why it cannot be restored.**

To restore deleted content:

1. On the navigation bar, click **Trash**.

   The My Trash page is displayed.
2. Click the tab you want.
3. Do one of the following:
   - Locate the content that you want to restore.
   - To search for specific content, enter a word or phrase in the **Search** box and click **Search**.

   Note: **To narrow your search, click Options. From the Within Property menu, select the name of the property to search. Then click Search.**
4. Do one of the following:
   - To restore one object, click the **Restore** icon in the object's Actions area.
   - To restore multiple objects, click the checkbox next to each object and select **Restore Selected** from the **Selected Actions** menu.
5. In the Restore window, click **Restore**. A confirmation message is displayed when the action is complete.
6. If the original location was removed, do the following:
   a. To search for a specific location, enter a word or phrase in the **Search** box and click **Search**.

   Note: **To narrow your search, click Options. Use Show Object Type to specify the type of object. From the Search In list, select the name of the property to search. Click Options to close the Options panel.**

   b. Click the arrow next to the object to which to restore the deleted content.
   c. Click the **Restore** button. A confirmation message is displayed when the action is complete.

   Note: **In some cases content cannot be restored without further action. When this occurs, a message is displayed. Follow the instructions provided to complete the action and resolve any conflicts.**

8 Use reports

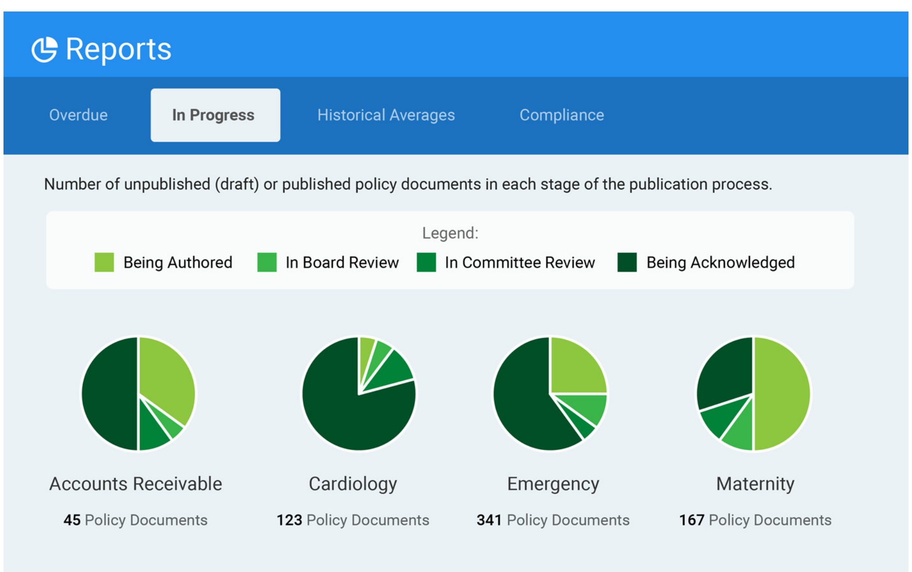
Healthcare Policy Manager provides four types of reports to help you monitor in-progress and overdue documents as well as policy compliance.

Depending on your role, the Reports you can access vary, as shown in the table below. Note that Policy Acknowledgers do not have access to Reports.

Report	Policy Coordinators	Authors	Reviewer Board	Approval Committee
Overdue	X	X	X	
In Progress	X	X	X	
Historical Averages	X			
Compliance	X			X

Each report page displays one report per manual. Policy Coordinators can view information on all of the policy documents in a manual. Authors and Review Board members can view information only on the documents they are tasked to work on.

Each report is displayed graphically as a progress indicator or pie chart. You can click a graphic to see a listing of the data that produced the report.



Report types

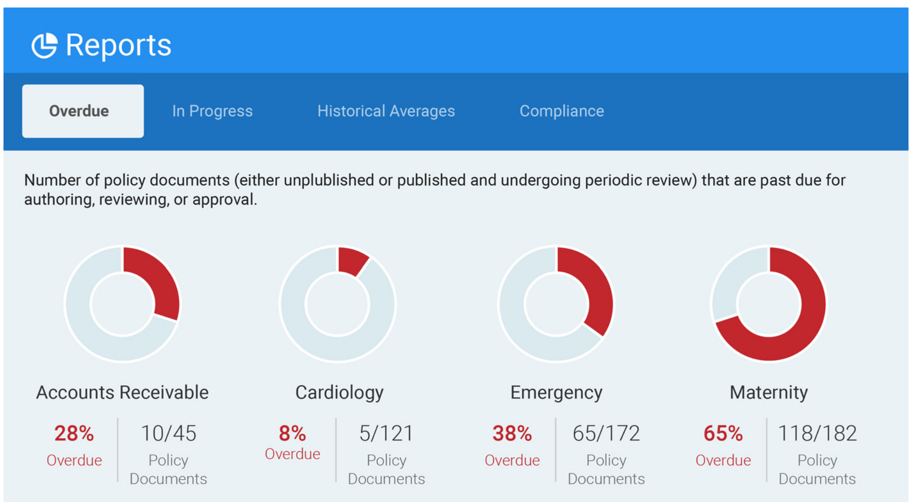
The Reports page provides four reports. This section explains each report.

Overdue reports

The Overdue report shows the number of policy documents, either unpublished (draft) or published and undergoing periodic review, that are past due for authoring, reviewing, or approval. A report is provided for each manual.

The percent overdue is represented as a progress indicator. The size of the indicator represents the total number of policies in the manual. The more policies in the manual, the larger the indicator.

You can mouse over each part of the indicator to display the number of policy documents that are on time and how many are overdue.



Access Overdue reports

To access Overdue reports:

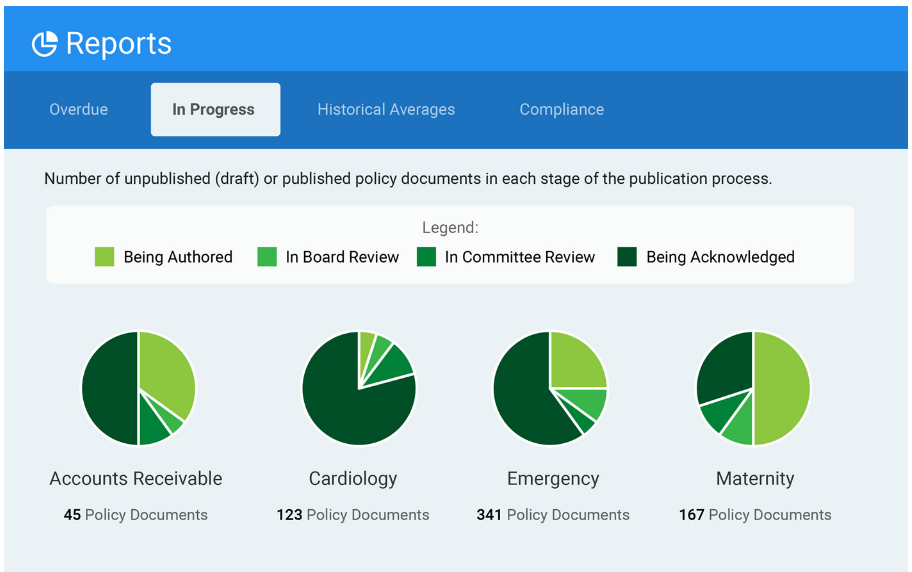
1. On the navigation bar, click **Reports**.
2. Click the **Overdue** tab. The Overdue reports are displayed.
3. Click a manual's indicator to open a page that contains a listing of the overdue policies in the manual.

In Progress reports

The In Progress report shows the number of unpublished (draft) or published policy documents in a manual and at what stage the documents are in the development process.

Each report is presented as a pie chart and each sector is color-coded by stage:

- Being Authored
- In Board Review
- In Committee Review
- Being Acknowledged



Access In Progress reports

To access In Progress reports:

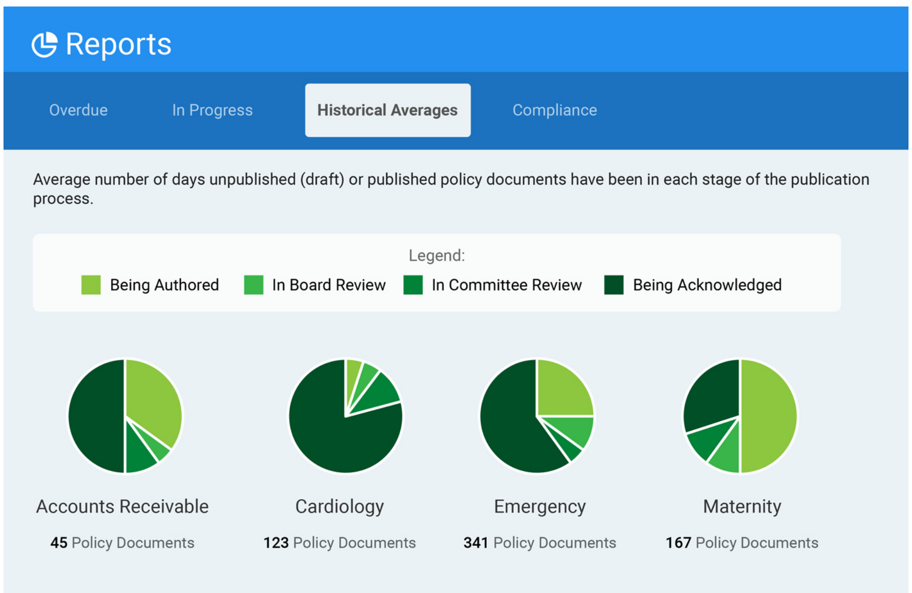
1. On the navigation bar, click **Reports**.
2. Click the **In Progress** tab. The In Progress reports are displayed.
3. Click a manual's pie chart to open a page that contains a listing of the in-progress policies in the manual.

Historical Averages reports

The Historical Averages report shows the average number of days that unpublished (draft) or published policy documents have been in each stage of the development process. A report is provided for each manual.

Each report is presented as a pie chart and each sector is color-coded by stage:

- Being Authored
- In Board Review
- In Committee Review
- Being Acknowledged



Access Historical Averages reports

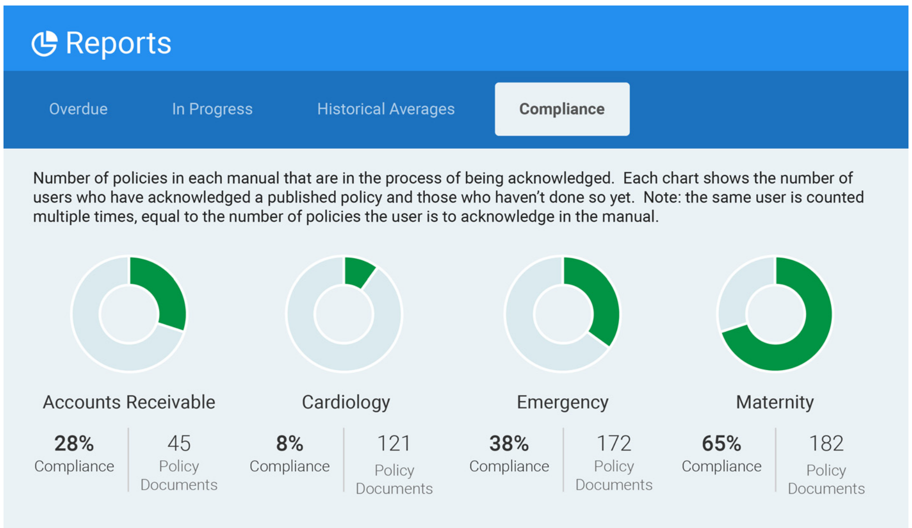
To access Historical Averages reports:

1. On the navigation bar, click **Reports**.
2. Click the **Historical Averages** tab. The Historical Averages reports are displayed.
3. Click a manual's pie chart to open a page that contains a listing of the policies in the manual and the average time spent, in days, for each stage.

Compliance reports

The Compliance report shows the number of policies in each manual that are in the process of being acknowledged. Each progress indicator shows the number of users who have acknowledged a published policy and those who haven't done so yet.

Compliant policies are published policies that have been acknowledged by all of the policy acknowledgers.



Access Compliance reports

To access Compliance reports:

1. On the navigation bar, click **Reports**.
2. Click the **Compliance** tab. The Compliance reports are displayed.
3. Click a manual's indicator to open a page that contains a listing of the compliant policies in the manual.

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