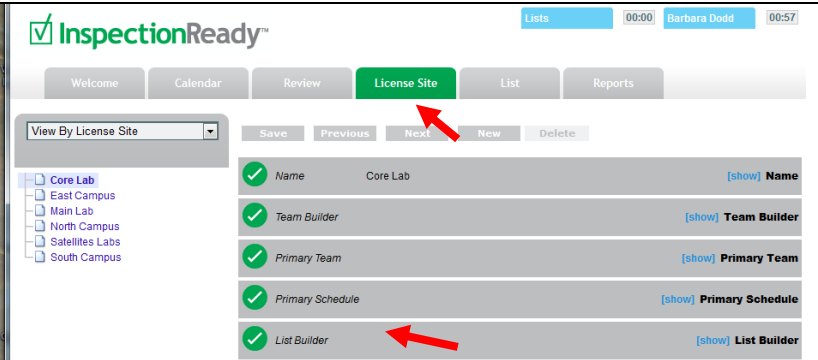
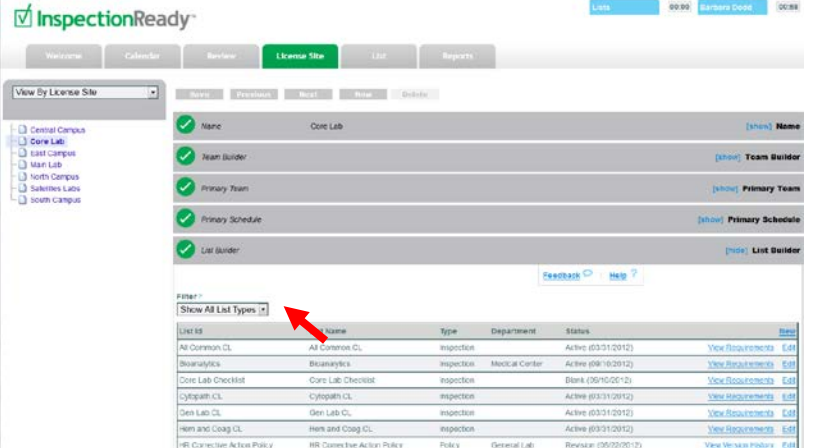
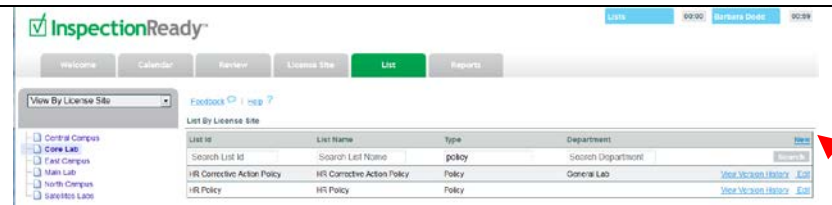
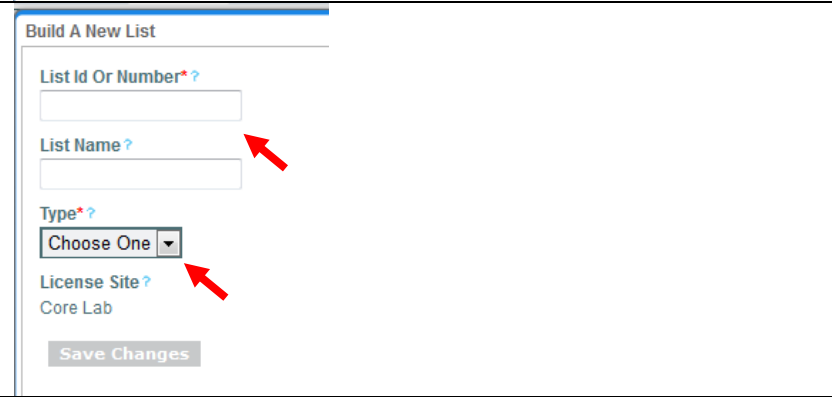
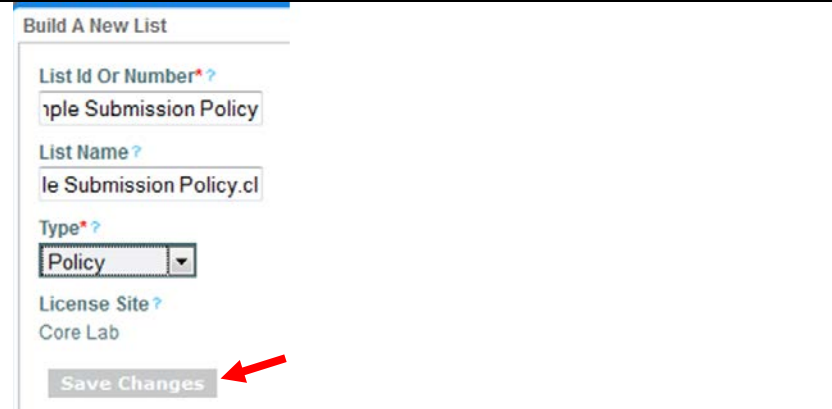
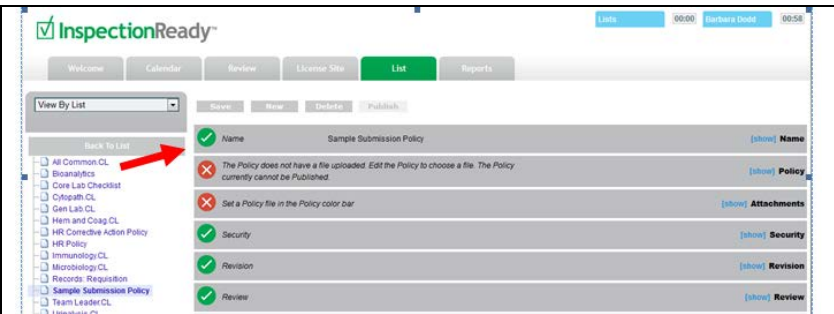
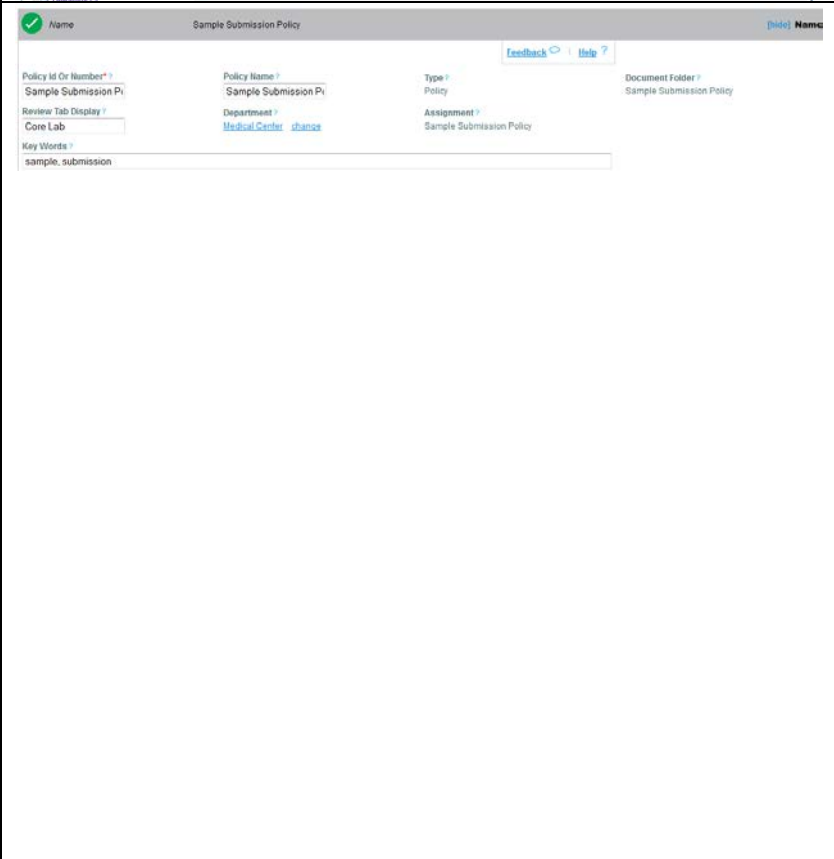


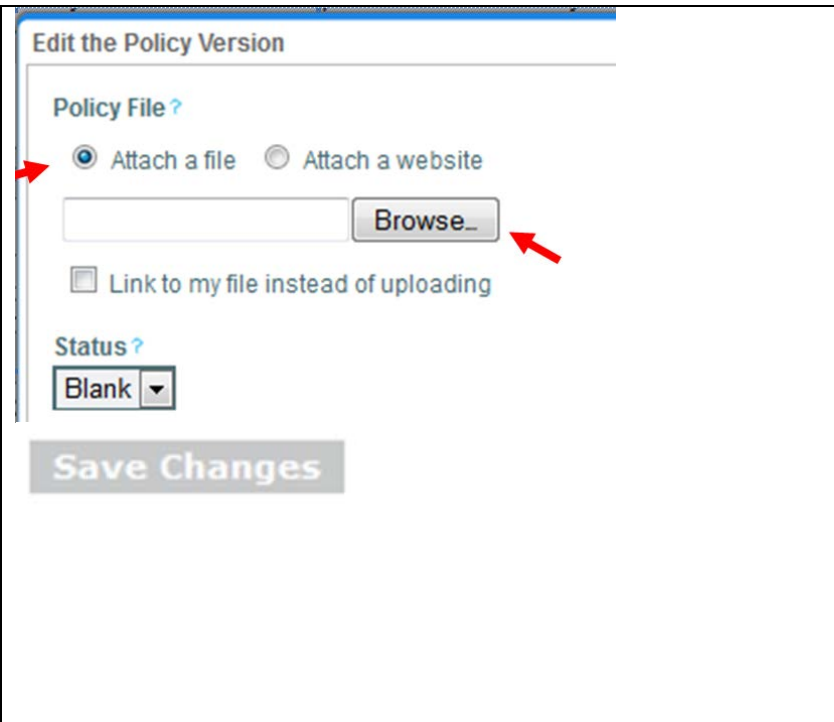
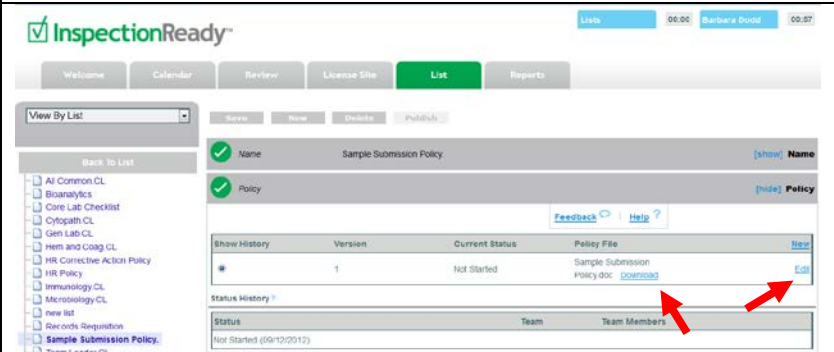
Policy – Overview		
Step	Action	
1.	<p>Navigate to the <b>License Site Tab</b>.</p> <p>Select the Site you want to work in (Core Lab in this example).</p> <p>Click on the <b>List Builder</b> color bar.</p>	
2.	<p>The <b>List Builder</b> color bar shows all the Lists that have been created for this License Site.</p> <p>The Filter allows you to filter the Lists in the table by a specific type or by Show All List Types. To see all the Policies, select Policy by using the drop-down menu.</p>	



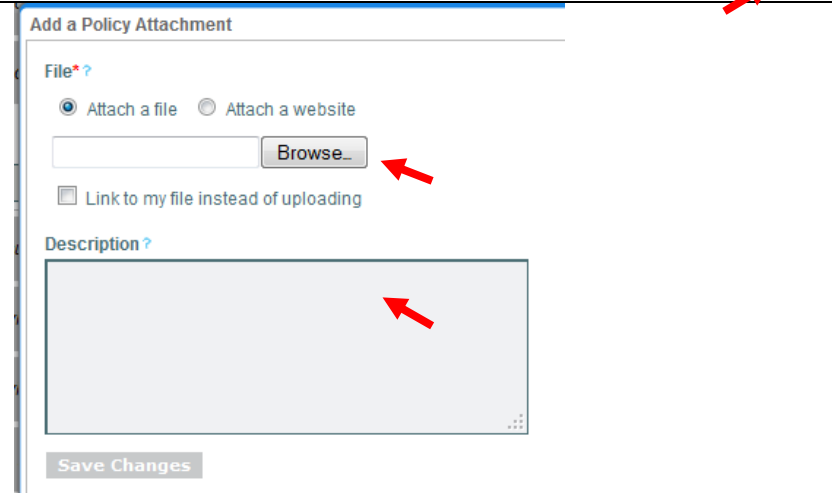
<p>3. Now the List shows only the Policies for this License Site. This feature makes a long list very manageable.</p>	
<p>4. Another way to see the existing Lists is to select the <b>List Tab</b>.</p>	
<p>5. The Search Fields allow you to search by List ID, List Name, Type, or Department. If you want to search by Type, type in Policy and select <b>Search</b>.</p>	

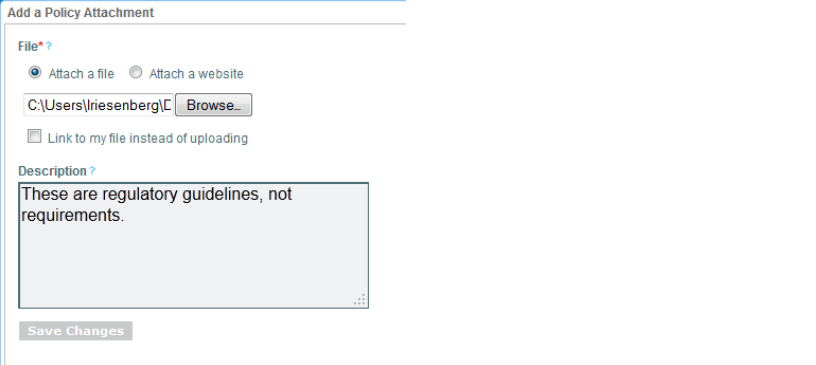

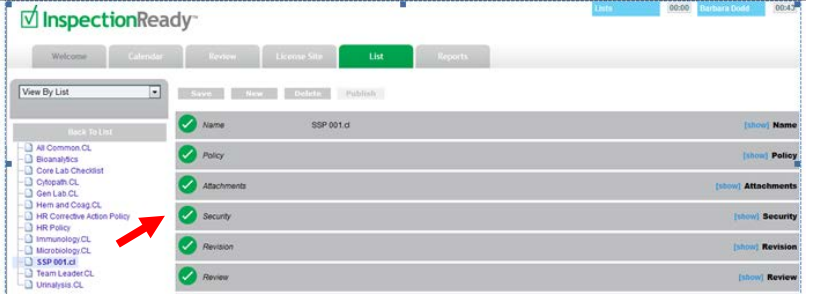
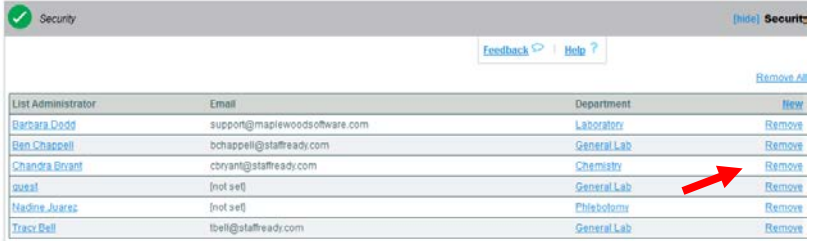
6.	<p>We are going to build a new Policy. Select <a href="#">New</a>.</p>	
7.	<p>In the Build a New List window, enter the List ID or Number and Name of the Policy you want to build.</p> <p>From the drop-down menu Type, select Policy.</p>	
8.	<p>We are going to build a Sample Submission Policy for the Core Lab License Site.</p> <p>Select <b>Save Changes</b>.</p>	

<p>9.</p>	<p>To build this Policy, we will go through each of the color bars shown on the right.</p> <p>Select the <b>Name</b> color bar.</p>	
<p>10.</p>	<p>Let's look at each of the fields in this color bar.</p> <p><u>Policy ID or Number:</u> This is the short name for the policy. It displays in the tree on the left and in the ID column when you first open the <b>List Tab</b>. It may have the same ID as the Name.</p> <p><u>Policy Name:</u> The name of this policy. This is useful if you are using a number in the Policy IR or Number field.</p> <p><u>Type:</u> There are several different types of lists in InspectionReady. Inspection lists are used to track CAP inspections. Policies are used to track different versions of a policy. Checklists allow you to create a list with custom requirements.</p> <p><u>Department:</u> Lists can optionally be assigned to a department. Setting this value will cause the department to show in Department column when you first open the <b>List Tab</b> and allow you to search by department.</p> <p><u>Review Tab Display:</u> As list tasks are assigned, employees can view them on the <b>Review Tab</b>. This value will show in the Subject column on the <b>Review Tab</b>.</p> <p><u>Assignment:</u> The name of the Assignment created by the system to store the policy tasks.</p> <p><u>Key Words:</u> Policies are uploaded files that InspectionReady cannot read through. Key words can be added here to allow you to search for policies based on the key words.</p> <p><u>Document Folder:</u> The name of the folder the system created to store the policy.</p>	


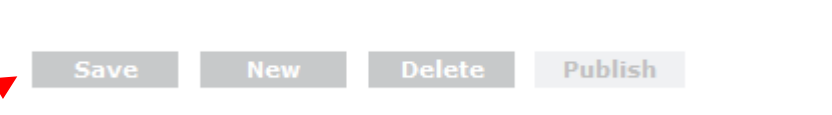
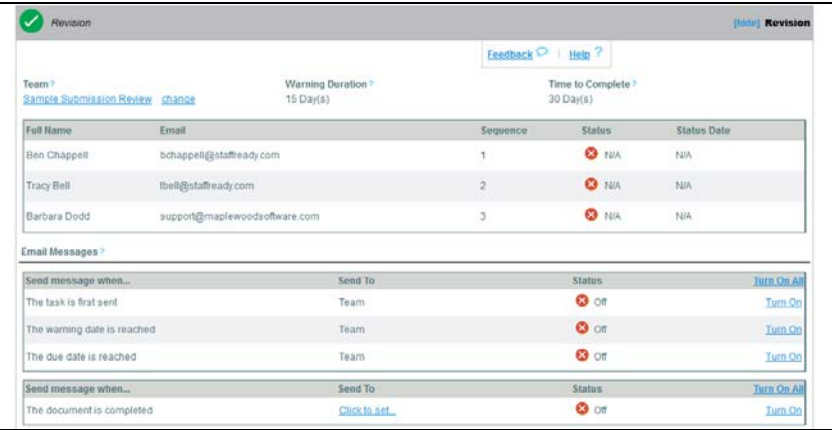


11.	If you want to add or change a Department, select <a href="#">Change</a> .	
12.	In the Choose a Department window, choose <a href="#">Select</a> . In this example, we will stay with Medical Center Department.	
13.	Enter any keywords you will search on for this policy.  We entered two words.  Select <b>Save</b> .	
14.	Select the <b>Policy</b> color bar to expand.	
15.	The color bar leads you to the next step.  Select <a href="#">Edit</a> to upload the Policy file.	

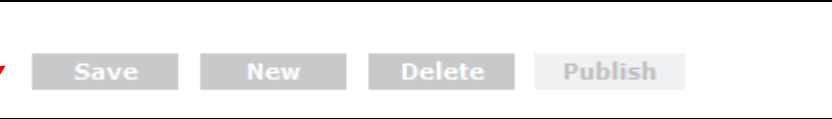

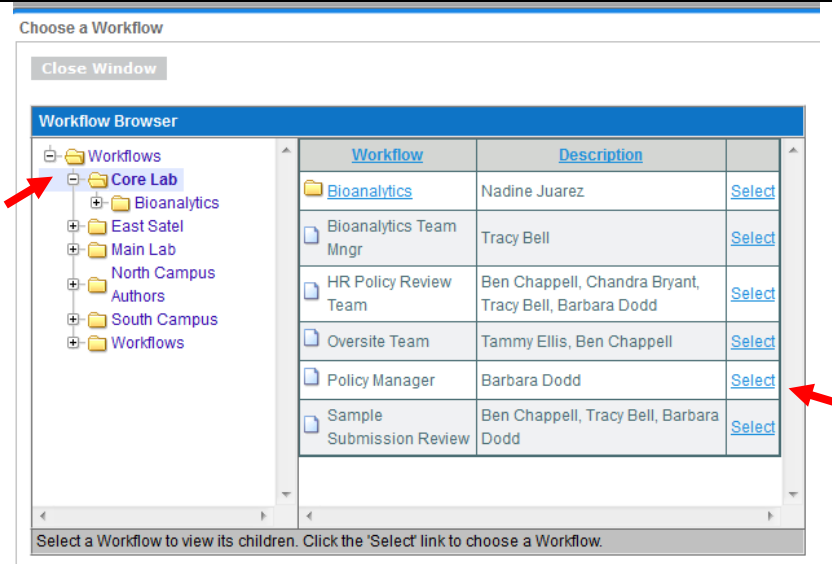


<p>16. In the Edit the Policy Version window, you may attach a file, link to the file instead of uploading, or provide a link to a website.</p> <p><u>Status:</u> This is the current status of the policy. You would be able to change the status here if you had completed setup (e.g. setting the policy to revision requires that a valid team is set in the <b>Revision</b> color bar). We have not yet done that, so the status will remain Blank.</p> <p>If you'd like to <u>link to a file</u> instead of uploading:          Select <b>Browse</b> and select the file you want to link.          Select the box Link to my file instead of uploading.</p> <p>We are going to <u>Attach a file</u> instead of Linking.</p> <p>Select Attach a file.</p> <p>Select <b>Browse</b> and select the file you want to use.</p> <p>Select <b>Save Changes</b>.</p>	
<p>17. To download the file, select the <a href="#">Download</a> link.</p> <p>To edit the file, select the <a href="#">Edit</a> link.</p> <p><u>Status History:</u> This table will show the status changes and employees involved (Team members) for the version selected in the Show History column above.</p>	


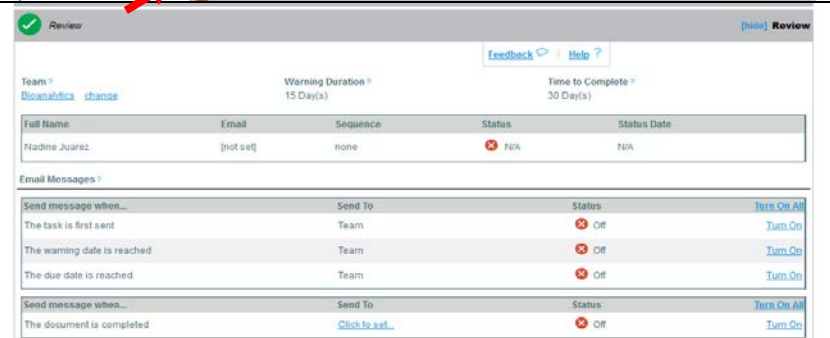
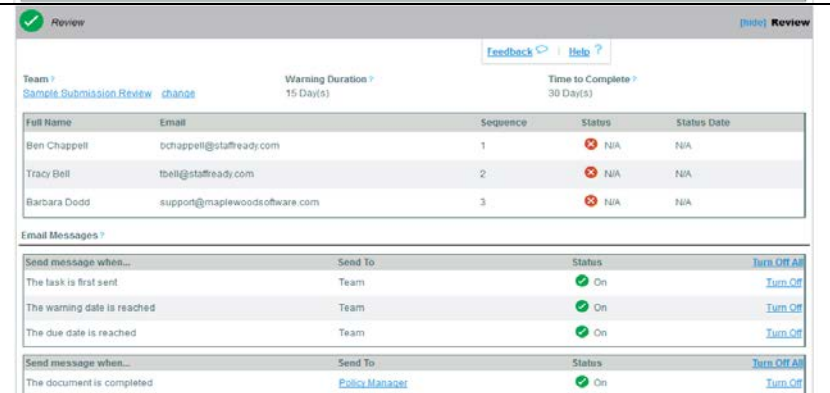
<p>18.</p>	<p>Select the <b>Attachments</b> color bar to expand.</p>	
<p>19.</p>	<p>Here you have the opportunity to attach documents that would support building this policy. To attach a document, select <a href="#">New</a>.</p>	
<p>20.</p>	<p>In the Add a Policy Attachment window - as shown before in Step 15 - select <b>Browse</b> to locate the file you'd like to attach or link to.</p> <p>In this case, we will attach a file.</p> <p>Enter a Description of the file if you would like. The description will show in the main table in the <b>Attachments</b> color bar. You may use this to help provide information on your attachment.</p>	

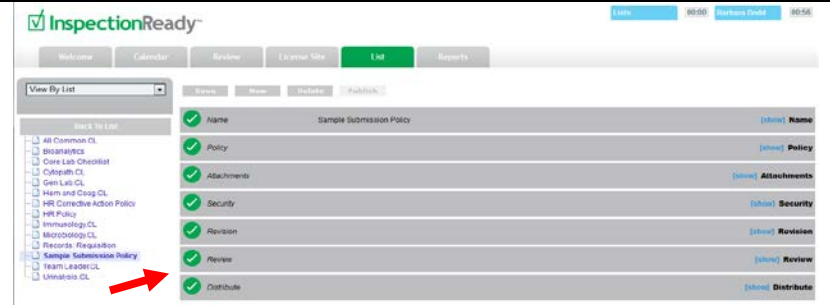
21.	Select <b>Save Changes</b> .	
22.	You may add more documents by selecting <a href="#">New</a> . You may remove this document by selecting <a href="#">Remove</a> .	
23.	Select the <b>Security</b> color bar to expand.	
24.	<p>This color bar is used to add privileges for users to see the list. Users may be added by clicking <a href="#">New</a> and searching for an employee. Users may be removed by clicking the <a href="#">Remove</a> link. Some users are added automatically by ScheduleReady.</p> <p>You may also remove all of the users at once by clicking <a href="#">Remove All</a>. All users except yourself will be removed.</p> <p>In this example, Tracy Bell and Barbara Dodd will be the users to see this list. So we will select <a href="#">Remove</a> for all the other employees.</p>	

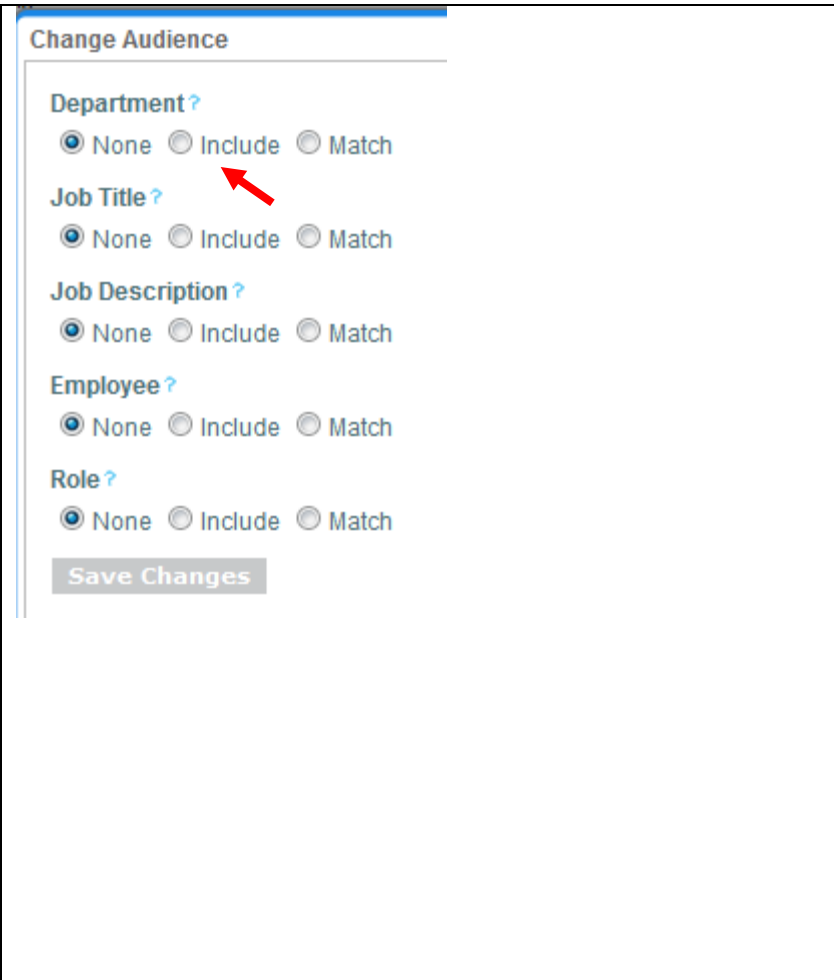
25.	<p>Barbara and Tracy can see the list.</p> <p>You can make changes at any time.</p>																																													
26.	<p>Select the <b>Revision</b> color bar to expand.</p>																																													
27.	<p>First, we will select the team to work on the revision of this Policy. Reminder, teams are created in the License Site tab (see Quick Reference Policy – Team Builder for instructions.)</p> <p>Select the <a href="#">Change</a> link.</p>																																													
28.	<p>We want to select a different team.</p> <p><a href="#">Select</a> Sample Submission Review.</p>	<table border="1"> <thead> <tr> <th>Team</th> <th>Team Members</th> <th>Type</th> <th>Creator</th> </tr> </thead> <tbody> <tr> <td>Search Team</td> <td>Search Team Member</td> <td>Search Type</td> <td>Search Creator</td> </tr> <tr> <td>Bioanalytics</td> <td>Nadine Juarez</td> <td>Auto-Updating</td> <td>-</td> </tr> <tr> <td>Bioanalytics Admin</td> <td>Terri Sullivan</td> <td>Auto-Updating</td> <td>-</td> </tr> <tr> <td>CHM.10500</td> <td>[no members]</td> <td>Manual-Updating</td> <td>-</td> </tr> <tr> <td>CHM.10600</td> <td>[no members]</td> <td>Manual-Updating</td> <td>-</td> </tr> <tr> <td>CHM.11900</td> <td>[no members]</td> <td>Manual-Updating</td> <td>-</td> </tr> <tr> <td>Operations Manager</td> <td>Cathy Murphy</td> <td>Auto-Updating</td> <td>-</td> </tr> <tr> <td>Policy Manager</td> <td>Barbara Dodd</td> <td>Auto-Updating</td> <td>-</td> </tr> <tr> <td>Records Team</td> <td>Tracy Bell</td> <td>Manual-Updating</td> <td>-</td> </tr> <tr> <td>Sample Submission Review</td> <td>Ben Chappell, Tracy Bell, Barbara Dodd</td> <td>Sequence</td> <td>-</td> </tr> </tbody> </table>	Team	Team Members	Type	Creator	Search Team	Search Team Member	Search Type	Search Creator	Bioanalytics	Nadine Juarez	Auto-Updating	-	Bioanalytics Admin	Terri Sullivan	Auto-Updating	-	CHM.10500	[no members]	Manual-Updating	-	CHM.10600	[no members]	Manual-Updating	-	CHM.11900	[no members]	Manual-Updating	-	Operations Manager	Cathy Murphy	Auto-Updating	-	Policy Manager	Barbara Dodd	Auto-Updating	-	Records Team	Tracy Bell	Manual-Updating	-	Sample Submission Review	Ben Chappell, Tracy Bell, Barbara Dodd	Sequence	-
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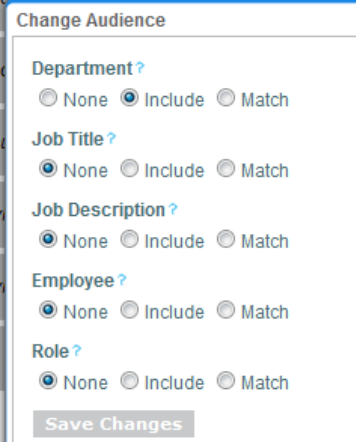
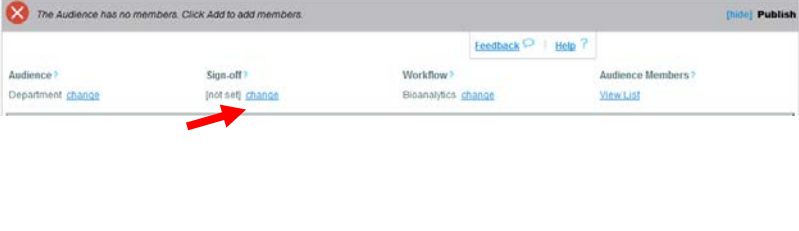
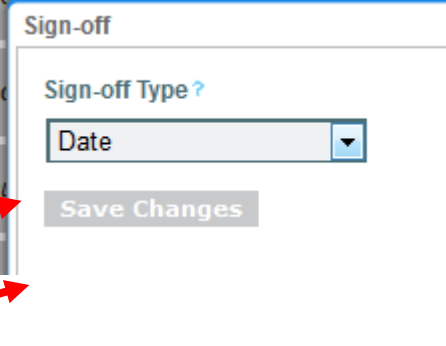

29.	This table shows that once Published, Ben Chappell will work on the revisions first, then it will be sent to Tracy Bell, and lastly to Barbara Dodd. That is the sequence that was set up when the team was set up.	
30.	Select <b>Save</b> .	
31.	Now let us set up the messaging for the Revision process.	
32.	First we want to select when the Team should receive an email message, when the task is first sent, when the warning date is reached, and when the due date is reached. We want, in this example, to have them receive an email for all three. So we would select <a href="#">Turn On All</a> link.	
33.	You may also select only one or two of the notifications, or none at all, by selecting the <a href="#">Turn Off/On</a> link for the individual employee.	

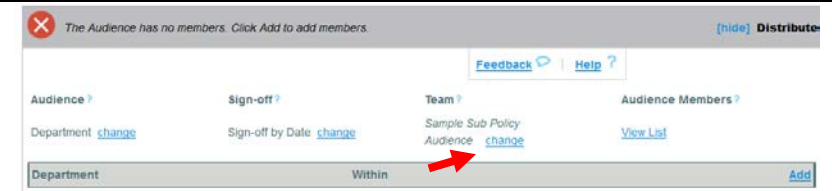

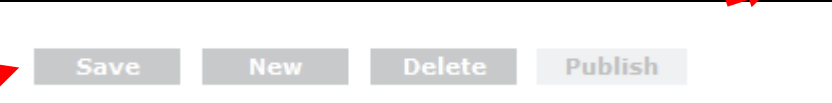
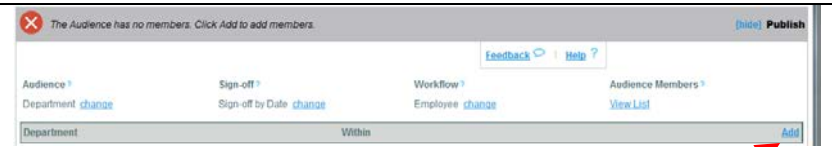
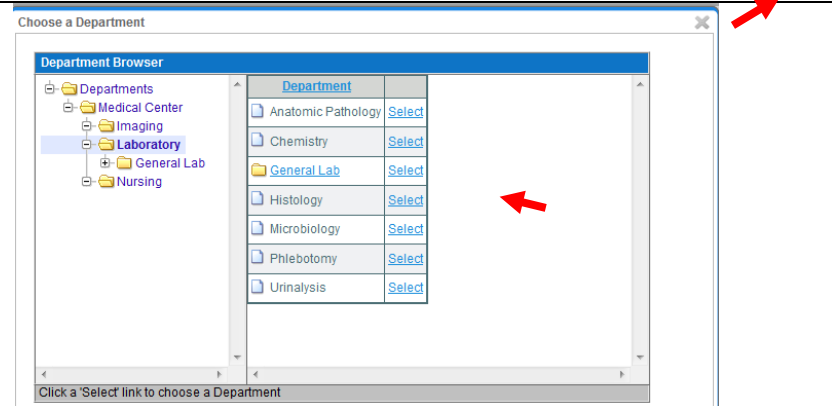
34.	Select <b>Save</b> .																						
35.	You may want someone (manager, administrator, etc) receive an email once the Revision process has been complete. Select <a href="#">Click to set</a> link.																						
36.	<p>Select who should be notified when the Revisions have been completed.</p> <p>Notice that the Core Lab workflow folder is selected on the left and who we want to select is the Policy Manager, Barbara Dodd.</p> <p>Choose <a href="#">Select</a> next to Policy Manager.</p>	 <table border="1" data-bbox="1123 576 1900 925"> <thead> <tr> <th>Workflow</th> <th>Description</th> <th></th> </tr> </thead> <tbody> <tr> <td>Bioanalytics</td> <td>Nadine Juarez</td> <td><a href="#">Select</a></td> </tr> <tr> <td>Bioanalytics Team Mngr</td> <td>Tracy Bell</td> <td><a href="#">Select</a></td> </tr> <tr> <td>HR Policy Review Team</td> <td>Ben Chappell, Chandra Bryant, Tracy Bell, Barbara Dodd</td> <td><a href="#">Select</a></td> </tr> <tr> <td>Oversite Team</td> <td>Tammy Ellis, Ben Chappell</td> <td><a href="#">Select</a></td> </tr> <tr> <td>Policy Manager</td> <td>Barbara Dodd</td> <td><a href="#">Select</a></td> </tr> <tr> <td>Sample Submission Review</td> <td>Ben Chappell, Tracy Bell, Barbara Dodd</td> <td><a href="#">Select</a></td> </tr> </tbody> </table>	Workflow	Description		Bioanalytics	Nadine Juarez	<a href="#">Select</a>	Bioanalytics Team Mngr	Tracy Bell	<a href="#">Select</a>	HR Policy Review Team	Ben Chappell, Chandra Bryant, Tracy Bell, Barbara Dodd	<a href="#">Select</a>	Oversite Team	Tammy Ellis, Ben Chappell	<a href="#">Select</a>	Policy Manager	Barbara Dodd	<a href="#">Select</a>	Sample Submission Review	Ben Chappell, Tracy Bell, Barbara Dodd	<a href="#">Select</a>
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37.	The email notification has been turned on.																						
38.	Select <b>Save</b> .																						

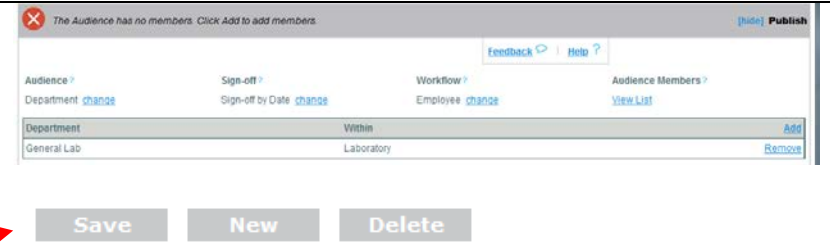

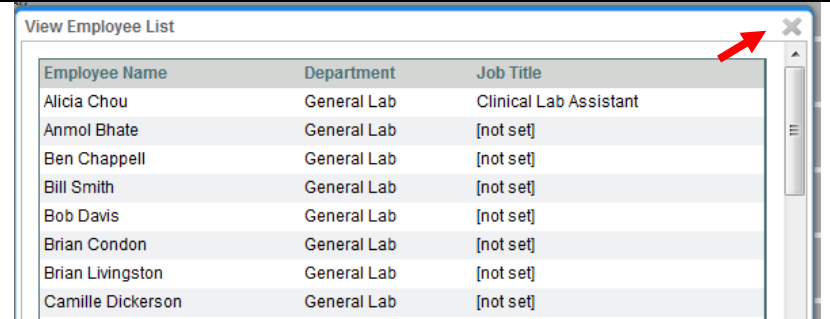
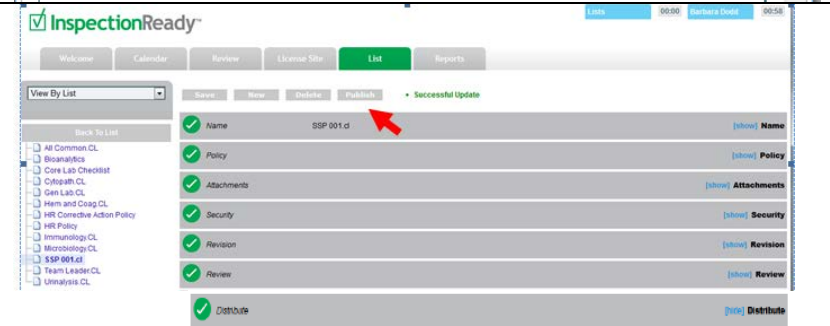
39.	Select the <b>Review</b> color bar to expand.	
40.	<p>We will now use the same process to set up the Review as we used to set up Revision.</p> <p>Follow Steps 31-38.</p>	
41.	The email notification has been turned on.	

42.	Select <b>Distribute</b> color bar to expand.	
43.	<p>The Audience is the list of employees that are the subject of the policy. An audience is a combination of different people like all of the employees in a specific department with a specific job title. The Audience Team was set up in the <b>License Site Tab/Team Builder</b> color bar.</p> <p>Select the <a href="#">Change</a> link for Audience.</p>	

<p>44.</p>	<p>The following functions are available in the Change Audience window:</p> <p><b>Department:</b> Setting a department to Include adds the employees in the department in the audience. Setting the department to Match adds the employees to the audience only if they are included in another field and match the department.</p> <p><b>Job Title:</b> Setting a job title to Include adds the employees in the job title in the audience. Setting the job title to Match adds the employees to the audience only if they are included in another field and match the job title.</p> <p><b>Job Description:</b> Setting a job description to Include adds the employees in the job description in the audience. Setting the job description to Match adds the employees to the audience only if they are included in another field and match the job description.</p> <p><b>Employee:</b> Setting an employee to Include adds the individual employees selected in the audience. Setting the employee to Match adds the employees to the audience only if they are included in another field and match the individual employees selected.</p> <p><b>Role:</b> Setting a role to Include adds the employees in the role in the audience. Setting the role to Match adds the employees to the audience only if they are included in another field and match the role.</p>	 <p>The screenshot shows the 'Change Audience' interface with the following settings:</p> <ul style="list-style-type: none"> <li>Department: <input checked="" type="radio"/> None <input type="radio"/> Include <input type="radio"/> Match</li> <li>Job Title: <input checked="" type="radio"/> None <input type="radio"/> Include <input type="radio"/> Match (A red arrow points to the 'Include' option)</li> <li>Job Description: <input checked="" type="radio"/> None <input type="radio"/> Include <input type="radio"/> Match</li> <li>Employee: <input checked="" type="radio"/> None <input type="radio"/> Include <input type="radio"/> Match</li> <li>Role: <input checked="" type="radio"/> None <input type="radio"/> Include <input type="radio"/> Match</li> </ul> <p>A 'Save Changes' button is located at the bottom of the form.</p>
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<p>45.</p>	<p>We will select Department Include.</p> <p>Select <b>Save Changes</b>.</p>	
<p>46.</p>	<p>Select <a href="#">Change</a> for Sign-off.</p> <p>When a policy is sent out employees must sign off on the policy. One sign off is created for each audience member. This field is used to set how the employees sign off. In some cases you may not want any sign off and you can just use the email notification only option.</p>	
<p>47.</p>	<p>In the Sign-Off window:</p> <p>Setting to <u>Date</u> will require the employee to set a date.          Setting <u>Signature</u> will require the employee to login.  <u>Email Notification Only</u> does not require sign off, but email messages will still go out.</p> <p>Select your choice from the drop-down menu.          We will select Date.          Select <b>Save Changes</b>.</p>	
<p>48.</p>	<p>Select <b>Save</b>.</p>	

49.	Select <a href="#">Change</a> for the Team.	
50.	We are choosing Sample Sub Policy Audience.  Choose <a href="#">Select</a> .	
51.	Select <a href="#">Save</a> .	
52.	We chose the Department as the Audience. Now we want to select the Department.  Select <a href="#">Add</a> .	
53.	To find the Department you want to choose, just drill down on the folders, and choose <a href="#">Select</a> for the Department you want.  General Lab is used in this example.  Choose <a href="#">Select</a> for General Lab.	

54.	Select <b>Save</b> .																												
55.	Audience Members: Clicking the “View List” link will allow you to see a list of the employees in the audience.  Select <a href="#">View List</a> .																												
56.	This is a partial view of the list.  Click the <b>X</b> in the upper right corner to leave.	 <table border="1" data-bbox="1129 792 1856 1040"> <thead> <tr> <th>Employee Name</th> <th>Department</th> <th>Job Title</th> </tr> </thead> <tbody> <tr><td>Alicia Chou</td><td>General Lab</td><td>Clinical Lab Assistant</td></tr> <tr><td>Anmol Bhate</td><td>General Lab</td><td>[not set]</td></tr> <tr><td>Ben Chappell</td><td>General Lab</td><td>[not set]</td></tr> <tr><td>Bill Smith</td><td>General Lab</td><td>[not set]</td></tr> <tr><td>Bob Davis</td><td>General Lab</td><td>[not set]</td></tr> <tr><td>Brian Condon</td><td>General Lab</td><td>[not set]</td></tr> <tr><td>Brian Livingston</td><td>General Lab</td><td>[not set]</td></tr> <tr><td>Camille Dickerson</td><td>General Lab</td><td>[not set]</td></tr> </tbody> </table>	Employee Name	Department	Job Title	Alicia Chou	General Lab	Clinical Lab Assistant	Anmol Bhate	General Lab	[not set]	Ben Chappell	General Lab	[not set]	Bill Smith	General Lab	[not set]	Bob Davis	General Lab	[not set]	Brian Condon	General Lab	[not set]	Brian Livingston	General Lab	[not set]	Camille Dickerson	General Lab	[not set]
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57.	Notice that the Publish action bar is now dark gray which means we are ready to Publish this Policy.  Select <b>Publish</b> .																												

<p>58. The Publish action bar is now light gray.</p>	
<p>59. Now that the Policy has been published, the Employees who have been assigned the tasks follow a process for Revising and Reviewing the Policy to completion. See Quick Reference Policy – Employee Tasks.</p>	
<p>60. The Revision and Review process is complete; all the employees have completed their tasks.</p> <p>Let's view this from where we initially set up the Policy.</p> <p>As before, we:</p> <ol style="list-style-type: none"> <li>1. Select <b>InspectionReady</b> from the drop-down menu</li> <li>2. Selet the <b>List Tab</b>.</li> <li>3. Select <a href="#">Edit</a> for the Sample Submission Policy</li> </ol>	
<p>61. Select the <b>Distribute</b> color bar.</p>	

62. Once the Revision/Review process is complete, the Policy is set to Active status, and when that occurs, the Policy is automatically sent out to the Audience as defined in the **Distribute** color bar (Steps 41-55).

