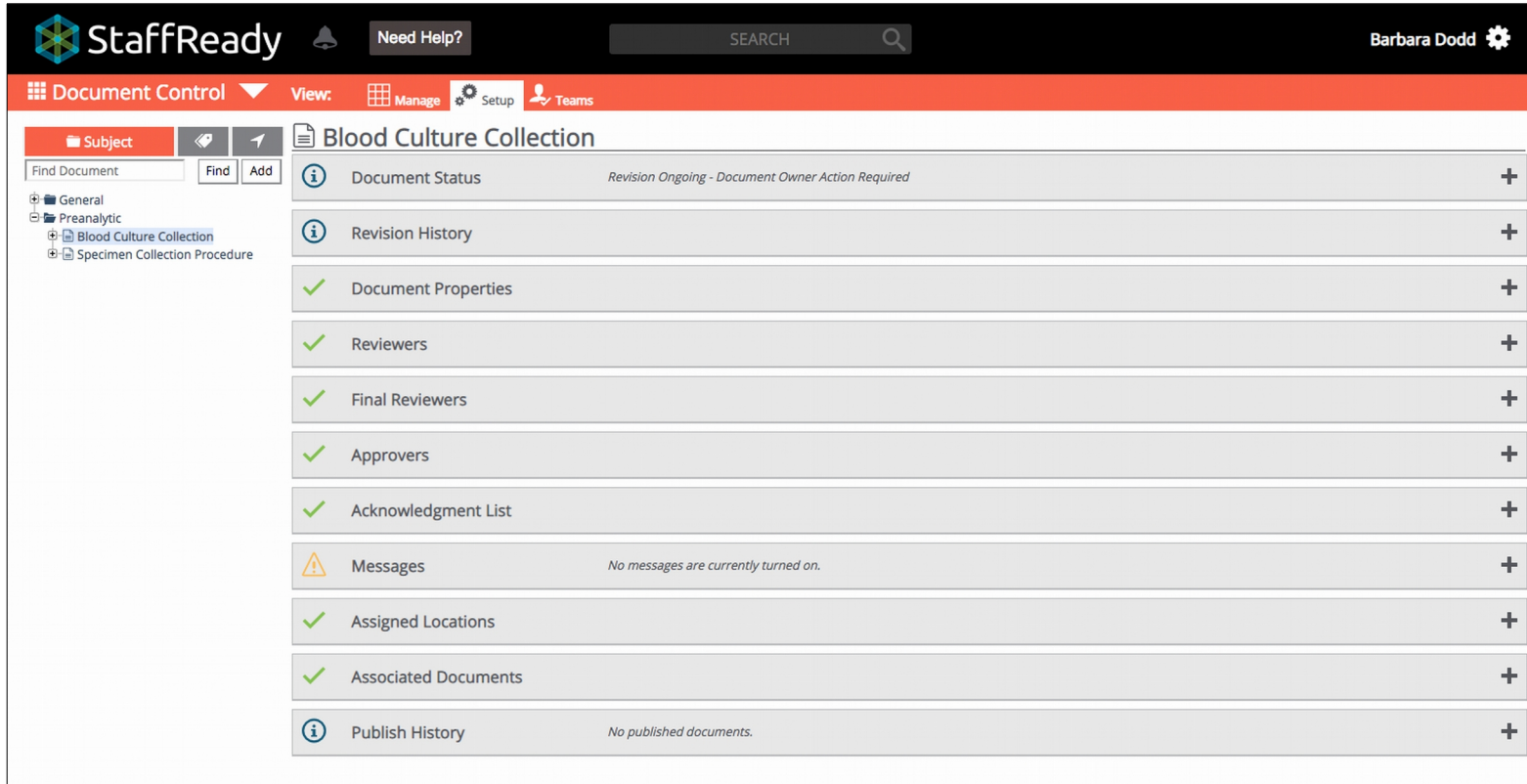


Document Control - Overview

This reference guide provides a comprehensive overview of concepts and terminology used in the Document Control Module. The following process steps and instructional information are provided in this document:

- [Document Organization](#)
- [Review Cycles and Roles](#)



The screenshot displays the StaffReady Document Control interface. At the top, the StaffReady logo is on the left, followed by a 'Need Help?' button, a search bar, and the user name 'Barbara Dodd' with a settings gear icon. Below this is a navigation bar with 'Document Control' selected, and options for 'View', 'Manage', 'Setup', and 'Teams'. The main content area is titled 'Blood Culture Collection' and features a sidebar on the left with a 'Find Document' search box and a tree view showing 'General', 'Prenalytic', 'Blood Culture Collection', and 'Specimen Collection Procedure'. The main panel lists various document management options, each with a status indicator and a plus sign for expansion:

Item	Status	Action
Document Status	Revision Ongoing - Document Owner Action Required	+
Revision History		+
Document Properties	✓	+
Reviewers	✓	+
Final Reviewers	✓	+
Approvers	✓	+
Acknowledgment List	✓	+
Messages	No messages are currently turned on.	+
Assigned Locations	✓	+
Associated Documents	✓	+
Publish History	No published documents.	+

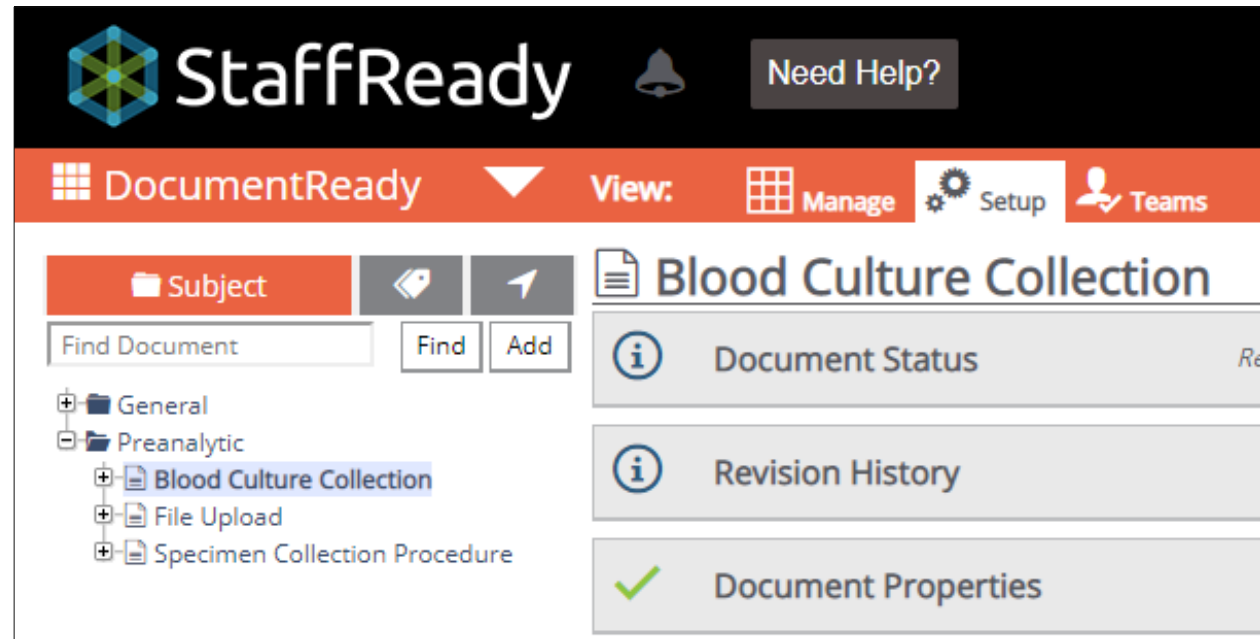
1 | Document Organization

The Document Control Module provides multiple **Perspectives** with integrated Search features, so you won't have to dig through complex folder structures or counterintuitive filing systems to find the document you need. Each perspective offers a different approach to grouping documents together, and each document can be organized with unique settings for easy access to related documents. Each document is grouped in three different ways: **Subject**, **Classification**, and **Location**.

Subject Perspective

The **Subject** perspective allows you to group documents according to the type of work they relate to. **Subjects** provide an alternative to Classifications by organizing documents of different types, or from different departments or sites. **Subjects** should be approached as a “High Level” or “Broad Stroke”.

Subjects are completely customizable to what fits your organization. For example, you can organize by department (such as Pathology, Blood Bank, Microbiology, etc.) or by type (such as Policy, Form, Standard Operating Procedure, etc.).

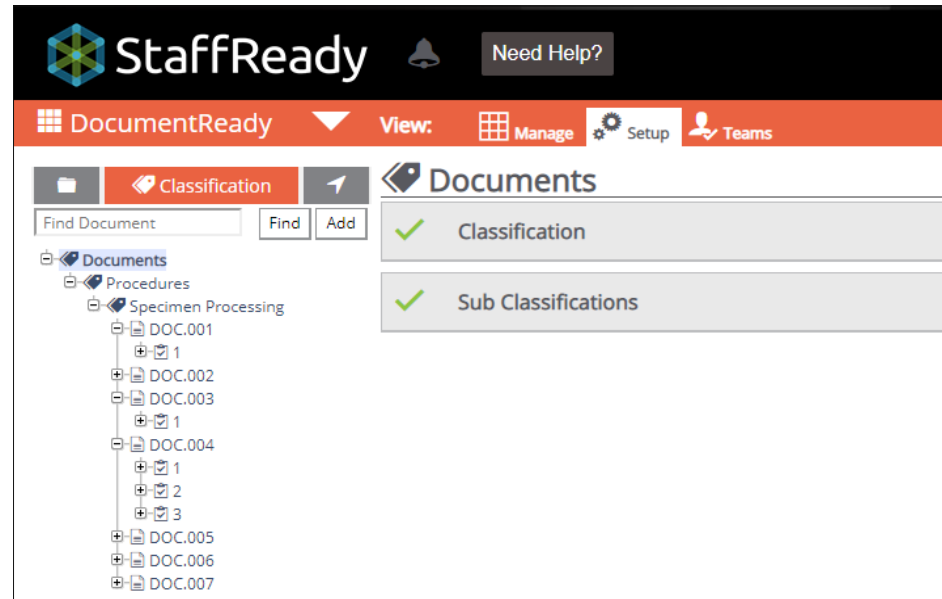


Classification Perspective

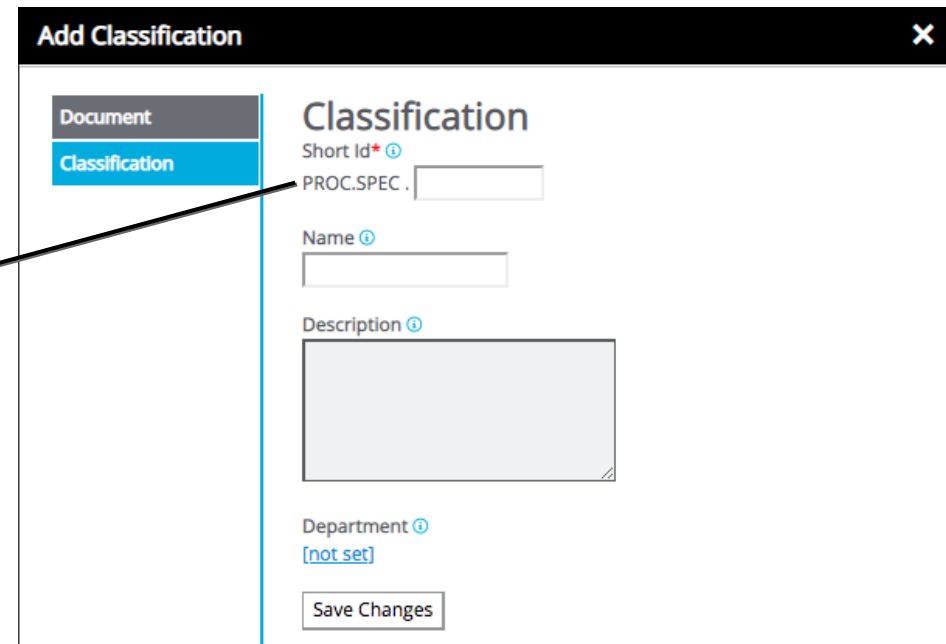
The **Classification** perspective is based on the Library of Congress filing system, and is used to display critical information at a glance. **Short Ids** are abbreviations that describe aspects of the related business process or area and can be used to quickly locate documents.

Classifications are distinct from Subjects (which group documents by topic, i.e. "Pharmacy Tech", "Blood Tests", etc.) and Locations (which group documents by the physical location of the equipment or process they describe).

***Note: Classification Short Ids** are also referred to as **Identifiers** (as shown in the Document Library color bar).

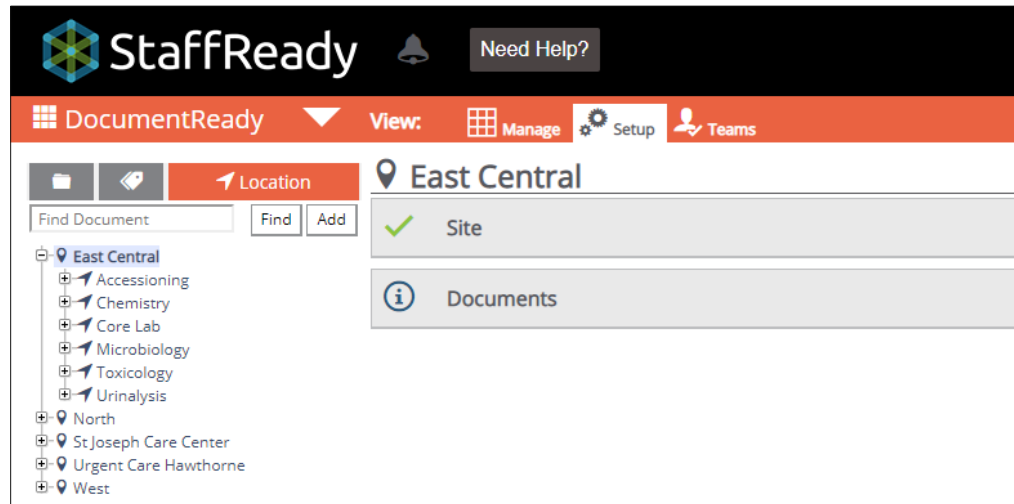


Short Id Example:
 "PROC.SPEC."
 translates to
 "Procedures.Specimen
 Processing."



Location Perspective

The **Location** perspective directly corresponds to physical areas or Sites where the equipment, business process, or testing procedure described in a document are located. A document can be listed under multiple locations.

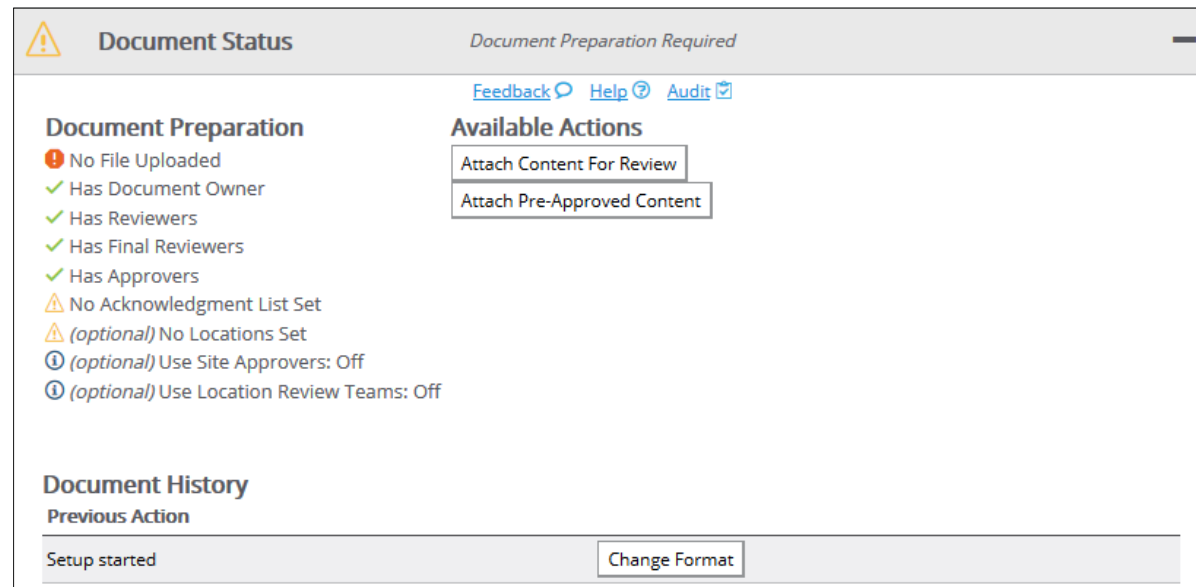


2 | Review Cycles and Roles

Document Control Revision Control System: Employee Roles

Important documents often require periodic updates, so Document Control provides a Review process that can be customized for each document.

You can define the Review cycle schedule, **roles** for each team member responsible for reviewing the document, start a Review, and more.



Document Control Revision Control System: Employee Roles (continued)

During a Review, each Document will be checked and revised by a team consisting of at least one **Reviewer** before being sent to a **Final Reviewer**. Once the new revision of the Document is validated by the **Final Reviewer**, it is sent to an **Approver** for authorization, after which the **Document Owner** can publish it for reading and acknowledgment. See below for definitions of each role:

Reviewer: A person that performs an analysis of the Document to check accuracy of content and/or consistency of formatting. A Document can have multiple **Reviewers**, but at least one is required. If multiple **Reviewers** have been added to a Document, typically at least one is a subject-matter expert on the topic.

Document Status *Revision Ongoing - Waiting for Reviewers*

[Feedback](#) [Help](#) [Audit](#)

Document Setup Review Final Review Approval Publish

Reviewers

[Feedback](#) [Help](#) [Audit](#)

Reviewer Team [ⓘ](#)
[not set]

Location Review Teams [ⓘ](#)
Off

Reviewers

Name	Email	Team/Site Team	Add Reviewer
Kelsie Ruhoff		No	Remove
Emma Bowers	ebowers@staffready.com	No	Remove
Steve Gallagher		No	Remove
Gary Long	glong@staffready.com	No	Remove
Barbara Dodd	bdodd@staffready.com	No	Remove

Document Control Revision Control System: Employee Roles (continued)

Final Reviewer (optional): A Reviewer who confirms the accuracy of a Document after the standard Review process has been completed. This is often a department manager or supervisor who is familiar with the content of the Document. A Document can have more than one **Final Reviewer**.

Approver: The final authority on whether a Document revision will be approved or denied. An **Approver** will read and validate the revised Document candidate before deciding to Approve or Deny the new version. An **Approver** is usually an organization's Medical Director, Senior Manager, or similar person with the authority to approve official documents. A Document can have more than one **Approver**.

✓ Final Reviewers
—

[Feedback](#) 🗨️
[Help](#) 🔗
[Audit](#) 📄

Final Reviewers

↕ [Name](#)
↕ [Email](#)
[Add Final Reviewer](#)

Howard Duck	<input type="button" value="Remove"/>
Barbara Dodd	bdodd@staffready.com <input type="button" value="Remove"/>

✓ Approvers
—

[Feedback](#) 🗨️
[Help](#) 🔗
[Audit](#) 📄

Site Approvers ⓘ

Off

Approvers

↕ [Name](#)
↕ [Email](#)
↕ [Site](#)
[Add Approver](#)

Barbara Dodd	bdodd@staffready.com	[not associated]	<input type="button" value="Replace"/>	<input type="button" value="Remove"/>
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Document Control Revision Control System: Employee Roles (continued)

Document Owner: The person responsible for maintaining a Document. The Owner will create and edit the Document, manage Review cycle schedules, and assign appropriate staff to each role. Once a Document is approved, the Owner can publish the Document for distribution to employees. Each Document can only have one Owner.

***Note:** A Document Admin has access to all Documents and the same permissions as a **Document Owner**.

Acknowledgment List: A list of employees who will receive a copy of the Published Document. As part of their assigned job duties, employees will be tasked to read and acknowledge the document.

✓ Document Properties
—

[Feedback](#) [Help](#) [Audit](#)

[Edit](#)

Name*	Document Type	Attachment
Specimen Collection Procedure	File or URL	Download
Subject	Classification	Time Between Reviews*
Preanalytic	PROC.SPEC	2 Year Interval
Document Owner	Permanent URL	
Barbara Dodd	Get URL	
Description		
Collection procedure for a variety of sample types.		
Active Revision Keywords		
[not set]		

✓ Acknowledgment List
—

[Feedback](#) [Help](#) [Audit](#)

Pinned Associations

Microbiology
✕

Chemistry
✕

Acknowledgment List Team
[\[not set\]](#)

Name	Department	Job Title	Pinned By	Email	Add Employee
John Janzen	Chemistry	[not set]	Chemistry	johnj@maplewoodsoftware.com	Exclude
Kristin Vega	Chemistry	[not set]	Chemistry	example@staffready.com	Exclude
Richard Sherman	Microbiology	Clinical Lab Assistant	Microbiology	[not set]	Exclude
Russell Wilson	Microbiology	Clinical Lab Assistant	Microbiology	[not set]	Exclude

To learn more about the **Staff Ready Document Control** module, please review the following documents in the Training Media Center.

For assistance with the **StaffReady Document Control** features, please contact our Customer Support team:

6am-5pm PST
Monday thru Friday
Phone: 1.877.229.5230
[Online Support Form](#)

Click the **Need Help?** box in StaffReady to access our new online Chat feature!



Perspectives Setup	PDF Document
Adding New Documents	PDF Document
Document Status Color Bar	PDF Document
Revision Tasks Color Bar	PDF Document
Acknowledgment List Color Bar	PDF Document
Acknowledgment Lists Color Bar	PDF Document
Revision History Color Bar	PDF Document
Final Revision Color Bar	PDF Document
Reviewers Color Bar	PDF Document
Final Reviewers Color Bar	PDF Document