



Workflow Approval Process for Revised and New Procedure in PolicyStat

This instruction will explain the steps taken to approve a Revised or New procedure.

It is important to know that during the PolicyStat workflow process, the Approver is required to accept or edit* the procedure while in the workflow. **If a procedure is revised (edited) or is new, it cannot be bulk approved.**

*Note: Editing means that the Approver does not agree with the written procedure and will make changes in the procedure that will restart the workflow. Editing will be covered in an additional instruction sheet.

Addition Note: PolicyStat refers to all Policy and Procedure documents as Policies.

- 1) Start at the home page and click the title ***Policies Requiring Your Approval.***

Title	Area	Effective Date
08-05.03 Attachments Data Validation and Management	08.00 Quality Improvement	Upon approval
Adjudication Process and Error Messages	08.00 Quality Improvement	Upon approval
8-02.08 National Core Indicators	08.00 Quality Improvement	Upon approval
08-02.02 Performance Indicator Development & Monitoring	08.00 Quality Improvement	Upon approval
08-04.01 Behavioral Health Accreditation	08.00 Quality Improvement	Upon approval
...plus More		

- 2) From the **My Policies Pending Approval** screen, review the list of procedures that require approval. The **REVISED?** field shows that status of the procedure (New, Revised, or Unchanged). Click on the title of the New or Revised procedure to view the procedure document.

Procedure Title here

Revised? Column here

Title	Area	Needed Approver	Step Description	Wait Time	Revised?	Effective Date
0.0.0 Practicing PolicyStat Sample Procedure	Implementations	You	Reviewer	11 minutes	New	Upon approval
06 05 07 Electronic Medical Record (EMR) Documentation				10 days	Unchanged	Upon approval
06 05 03 Attachments Data Validation and Management				10 days	Revised	Upon approval

- 3) With the procedure open, click on the **'Show Changes,'** located on the right side of the page, to view all changes made to the procedure.

Show changes here.

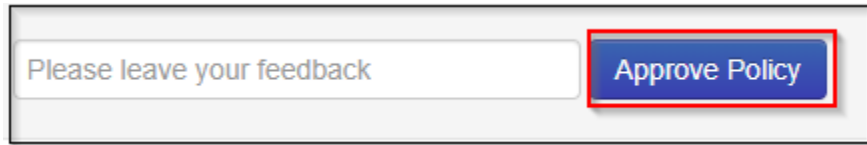
Current Status: Pending

Policy Stat ID: 9957344

Origination: AIA
Effective: Upon Approval
Last Approved: AIA
Last Revised: AIA

Changes by: Learn more

- 4) Do not leave feedback in the box next to the Approve Policy button unless you have created an edit. Once changes have been reviewed and agreed upon, select **Approve Policy**. This will complete the approval process for this procedure.



A screenshot of a user interface element. On the left is a text input field with the placeholder text "Please leave your feedback". To the right of this field is a blue button with the text "Approve Policy" in white. The button has a red rectangular border around it.

Note: Once the Approval process is completed, PolicyStat returns to the **My Policies Pending Approval** page with a note stating the procedure was successfully marked approved.



A screenshot of a web page titled "My Policies Pending Approval" with a blue header bar. Below the header is a green success message: "✓ You have successfully marked your approval for this version of". To the right of this message is a blue-bordered box containing the text "The name of the Procedure will show here." in blue.