



Editing and Commenting on Pending Procedure in the Workflow

This instruction will explain the steps taken to add/review comments and creating an edit to a Revised or New Procedure. The Add/review comments and creating an edit has been broken into two sections below.

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.

Definitions

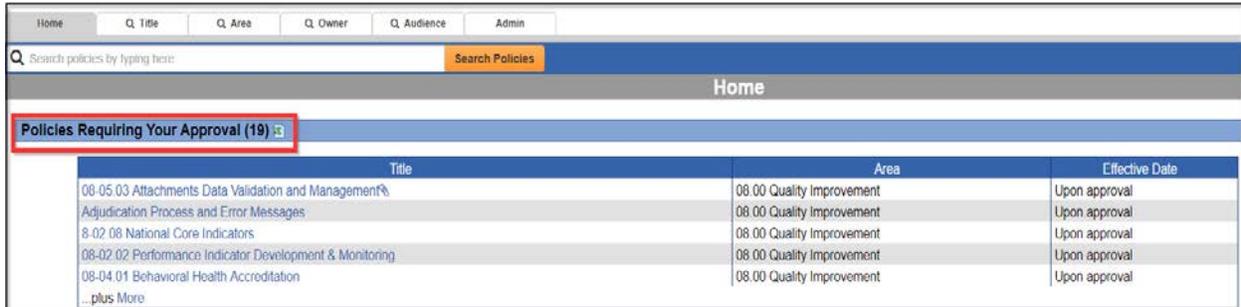
Adding Comments: While a procedure is undergoing a review, approvers can comment on a Pending Procedure to discuss potential changes, references, regulations, and any other items of interest before an edit is made. Commenting becomes part of the historical record of the document but does not become part of the Procedure without an edit happening. All approvers will be notified of any comments made during the review process while the procedure is in the workflow.

Edit: Editing creates a permanent change in the official Procedure document. When an edit occurs, the workflow process will return to the beginning, which starts the workflow all over again. All approvers are required to review the revised (edited) document, and mark with approval or reject the edit.

Note: Typographical errors, misspellings, and improper punctuation, should only be handled by the LW PolicyStat Administration Team. Please email any finding to the LW Administration Team for correction. **DO NOT complete an edit on the document.**

Adding and reviewing comments of procedures in the review workflow process

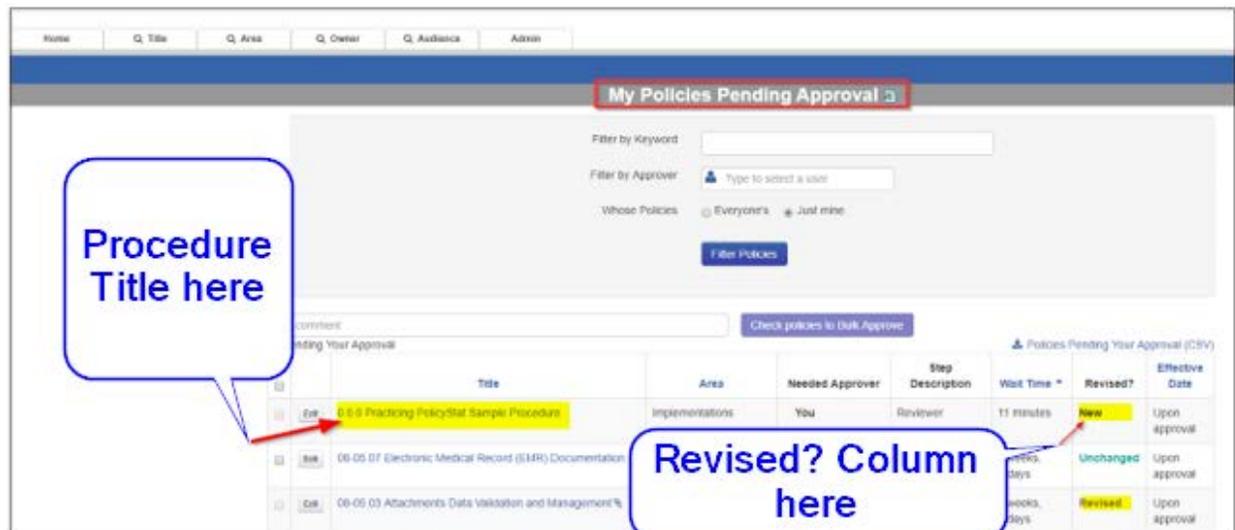
- 1) Start at the home page and click the title **Policies Requiring Your Approval**.



The screenshot shows the Home page of a system. At the top, there are navigation tabs: Home, Q, Title, Q, Area, Q, Owner, Q, Audience, and Admin. Below these is a search bar with the text "Search policies by typing here:" and a "Search Policies" button. The main content area has a header "Home" and a sub-header "Policies Requiring Your Approval (19)" which is highlighted with a red box. Below this is a table with columns: Title, Area, and Effective Date.

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		

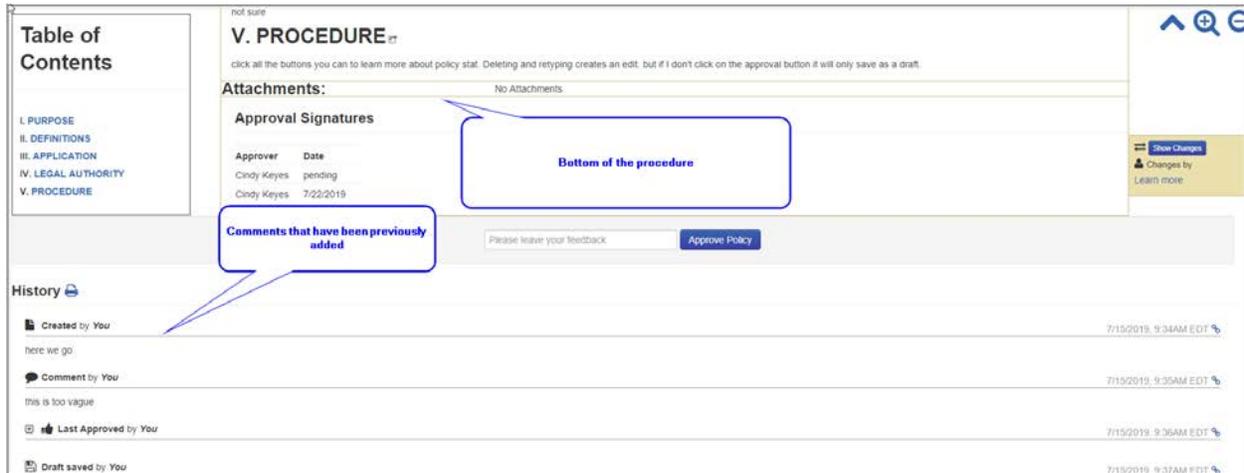
- 2) From the **My Policies Pending Approval** screen, review the list of procedures that require approval. The **REVISED?** field shows that status of the procedure (New, Revised, or Unchanged). Click on the title of the New or Revised procedure to view the procedure document.



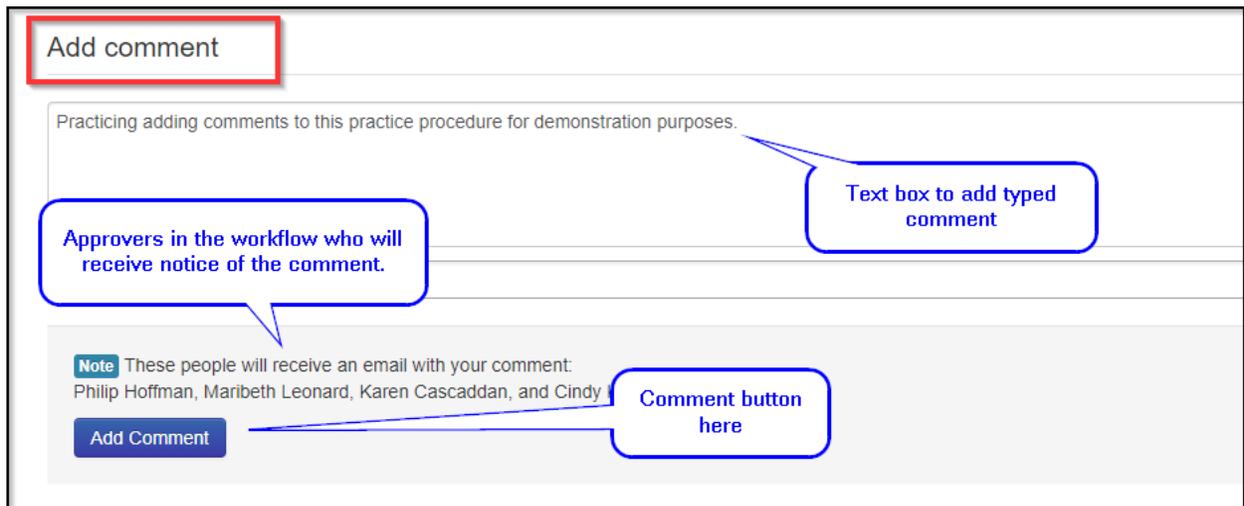
The screenshot shows the "My Policies Pending Approval" screen. At the top, there are navigation tabs: Home, Q, Title, Q, Area, Q, Owner, Q, Audience, and Admin. Below these is a header "My Policies Pending Approval" which is highlighted with a red box. The screen contains a filter section with fields for "Filter by Keyword", "Filter by Approver" (with a dropdown menu), and "Whose Policies" (with radio buttons for "Everyone's" and "Just mine"). Below the filter section is a "Filter Policies" button. The main content area shows a table with columns: Title, Area, Needed Approver, Step Description, Wait Time, Revised?, and Effective Date. A blue callout box points to the title "08-05-03 Practicing Policy/Stat Sample Procedure" with the text "Procedure Title here". Another blue callout box points to the "Revised?" column with the text "Revised? Column here".

Title	Area	Needed Approver	Step Description	Wait Time	Revised?	Effective Date
08-05-03 Practicing Policy/Stat Sample Procedure	Implementations	You	Reviewer	11 minutes	New	Upon approval
08-05-07 Electronic Medical Record (EMR) Documentation				10 days	Unchanged	Upon approval
08-05-03 Attachments Data Validation and Management%				10 weeks	Revised	Upon approval

3) With the procedure open, scroll to the bottom of the procedure to review comments.



4) To add a comment, scroll to the bottom of the page to find the **Add Comment** box. Type the comment in the text box and then click the **Add Comment** button.



5) View posted comment with option to edit.

Note: Once the comment has been added, it becomes part of the historical record of the document. Comment edits are only allowed during the first 10 minutes of the post. After this time period, the comment is permanent and cannot be removed by anyone, including PolicyStat Administrations.

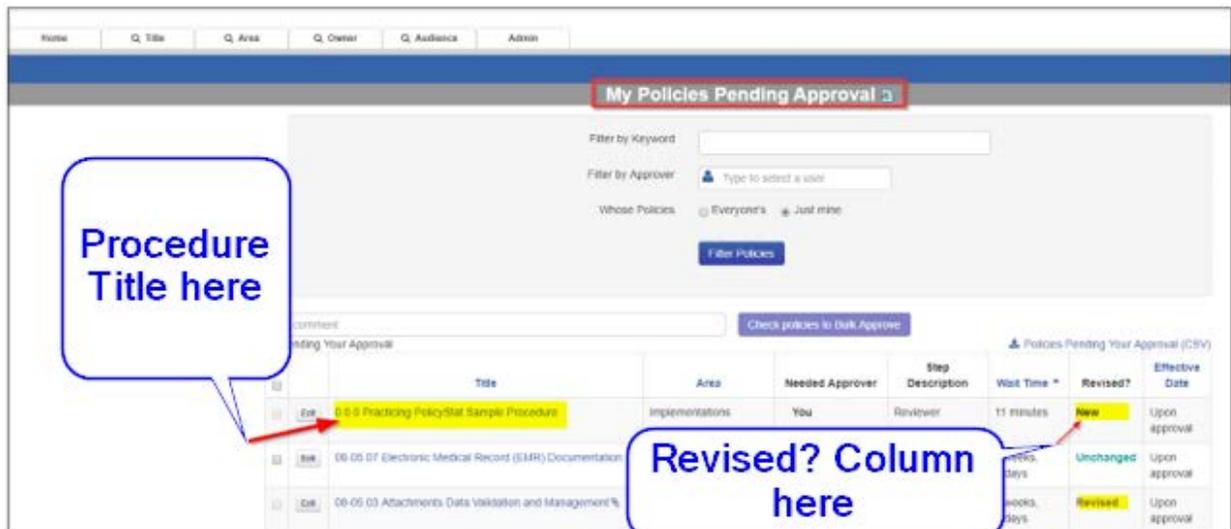


Editing a pending procedure during the workflow process

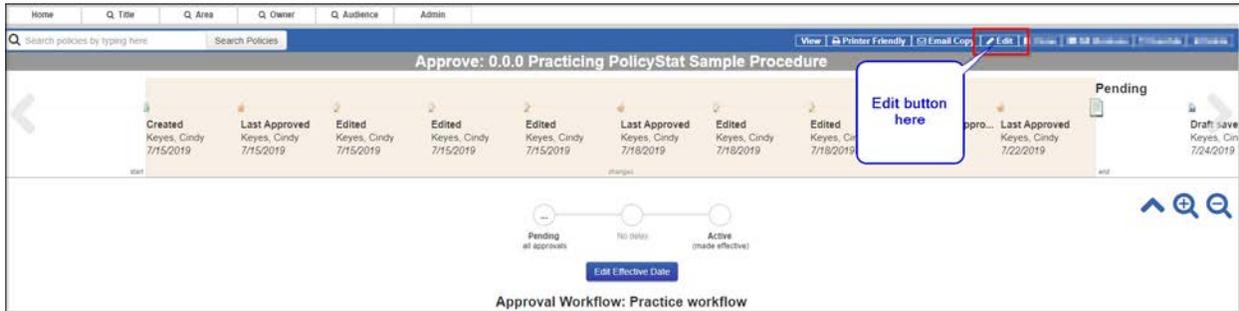
- 1) Start at the home page and click the title ***Policies Requiring Your Approval***.



- 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.



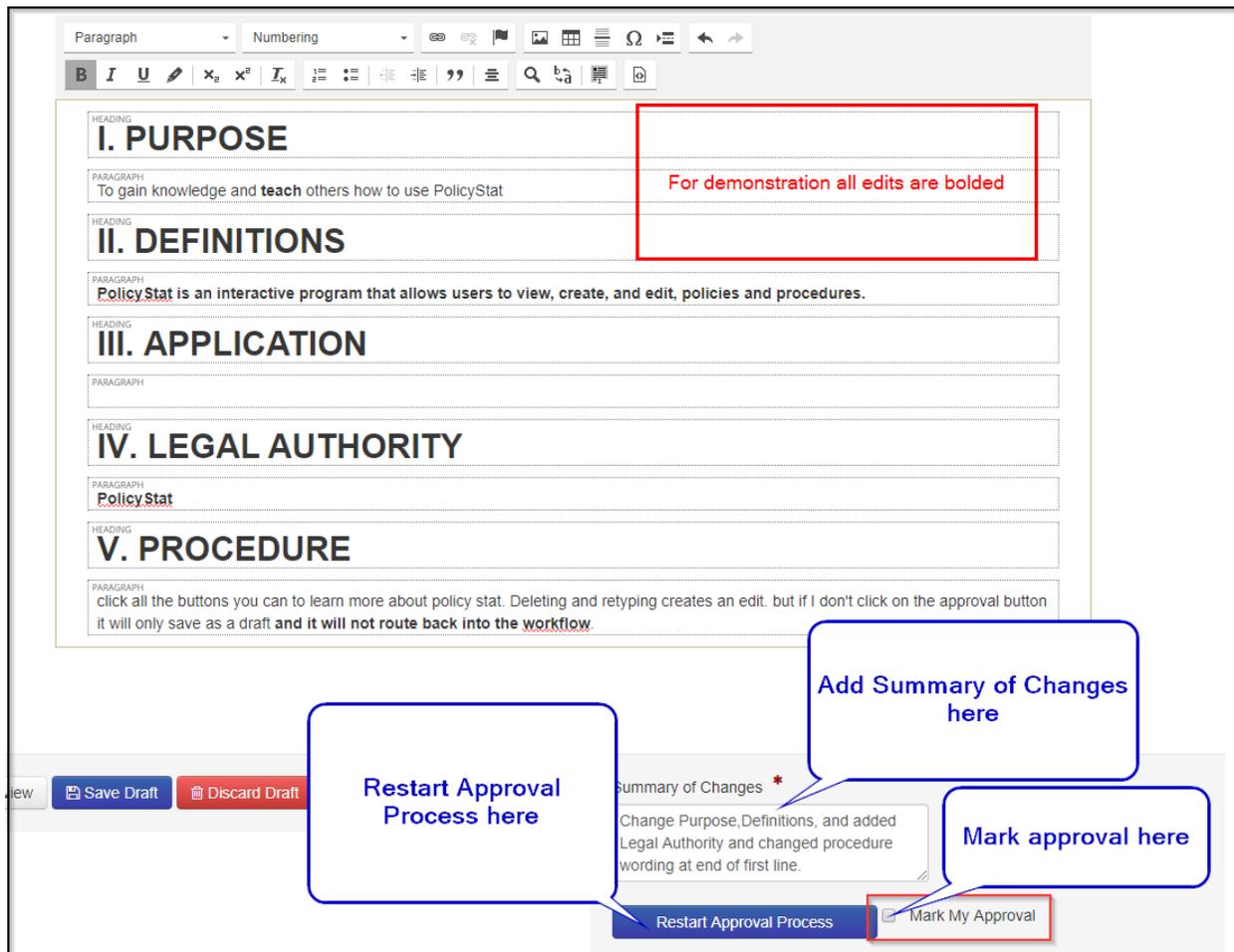
3) With the policy now open, click the **Edit** button at the top of the page.



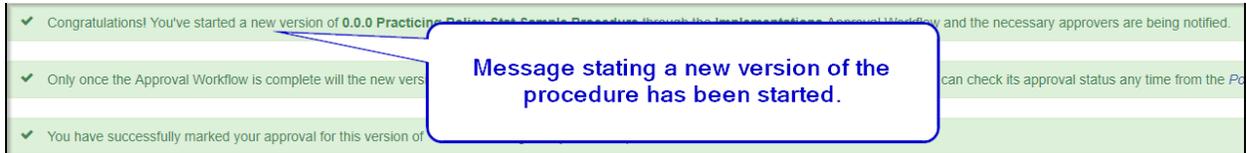
4) With the editing window open, complete the **edits**.

5) Then note the changes in the *Summary of Changes* text box. (Please see screen shot below).

6) Once the changes are complete, click the **Mark My Approval** Button and then click **Restart Approval Process**.



- 7) Once the approval is marked and the Restart **Approval Process** has started the screen will route back to the beginning with a message the procedure is now started a new version through the workflow.



Note: Upon receiving this message, all Approvers within the Workflow will receive notification to review the edits and approve the revised procedure.