

# Committees and Review Sets

## Creating a new committee

1. From the PolicyStat home tab, locate and click **Create Committee** from the right column (Fig. 1).
2. Assign committee members.  
*Only the Committee Name and Chair are required fields to create a review set. All other field are optional.*
3. When all desired members have been added, click the **Create Committee** button at the bottom.

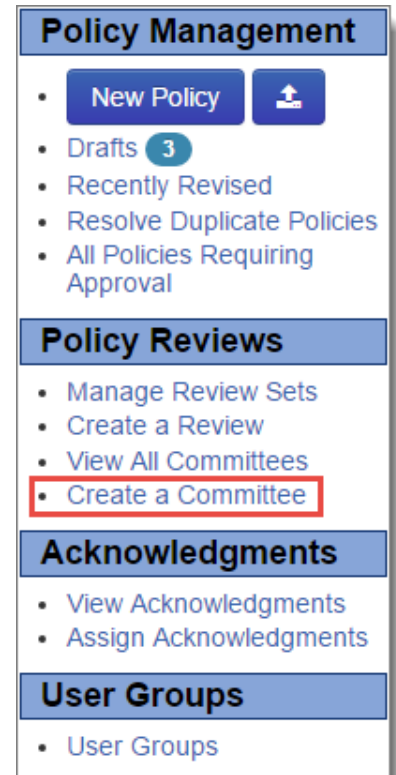


Fig. 1

The image shows a form titled '\* Required Fields'. It has four main sections: 'Committee Name \*' with a text input field containing 'Test'; 'Chair \*' with a user selection dropdown showing 'Clark, John: Medical Director'; 'Admin' with a user selection dropdown showing 'Durden, Tyler'; and 'Members' with a user selection dropdown showing a list of names: 'Austin, Steve: Information Services Manager', 'Dorner, Rick: Director of Plant Operations', 'Froman, Abe', and 'Neff, Susie: Payroll'. At the bottom of the form is a blue button labeled 'Create Committee' with a red border.

Fig. 2

# Committees and Review Sets

## Creating a new Review Set

1. From the PolicyStat home tab, locate and click **Create a Review** (Fig. 3).
2. Complete the details for the Review set (Fig. 4) including:
  - a. Review date
  - b. Base committee  
*If no committee exists, create a committee using the directions provided on page 1 of this document.*
  - c. Committee Members  
*Add or delete members from the base committee as needed. To delete, click the X next to their name.*
3. When the details have been properly populated, click **Create Review Set**.

**Review Details**

\* Required Fields

Review date \*

11-04-2016

Base committee \*

Test

Committee Members \*

Type to select a set of users

- ✕ Austin, Steve
- ✕ Dorner, Rick
- ✕ Froman, Abe
- ✕ Neff, Susie

**Create Review Set**

Figure 4

**Policy Management**

- New Policy
- Drafts 3
- Recently Revised
- Resolve Duplicate Policies
- All Policies Requiring Approval

**Policy Reviews**

- Manage Review Sets
- Create a Review
- View All Committees
- Create a Committee

**Acknowledgments**

- View Acknowledgments
- Assign Acknowledgments

**User Groups**

- User Groups

Figure 4

# Committees and Review Sets

## Modifying a Review Set

1. Locate documents to add a Review set.

Filter the total list of documents by:

- a. Title (1)
- b. Policy Area (2)
- c. Assigned Owner (3)
- d. Include draft policies in the result (4)

To search using the filters, or to search all document without filters applied, click the eyeglass icon (5).

The screenshot shows a web interface for adding policies to a review set. At the top, there are three tabs: 'Add Policies', 'Details', and 'Complete'. Below the tabs is a blue header 'Add Policies to Review'. The main area contains a search bar (1), a dropdown menu (2), a user selection field (3), a checkbox for 'Include draft Policies in search' (4), and an eyeglass icon (5). Below the search fields is a yellow box labeled 'Attached Policies (0)'.

2. From the search results list, click **Add** to attach a document to the review set.

The screenshot shows a search results list with 13 results. The first result is 'Training: Test Policy' with an 'Add' button. The second result is 'Training: HIP006 - DISCLOSURE LOGS' with an 'Add' button highlighted by a red box.

3. The committee members attached to the Review set will be notified via a report on their home tab of the outstanding items for review.

The screenshot shows a blue header 'Review Sets (1)' and a summary for 'Test123 review : reviewed:0 unreviewed:2'.

4. To send additional personal notifications to users, use the **View/Send Notifications** link in the top right of the Review Sets page, just under the PolicyStat logo.

The screenshot shows two links: 'Edit Review Set' and 'View/Send Notifications'. The 'View/Send Notifications' link is highlighted with a red box.

5. This page will contain the ability to create new Notifications or review previously distributed notifications as well.

The screenshot shows a 'Send Notification' form with a text area for 'Custom Message (optional):' and a 'Send' button.

# Committees and Review Sets

## Participating in a Review Set

1. Committee members attached to a Review set will receive notification on their home tab about an active Review set.

**Review Sets (1)**  
Test123 review reviewed:0 unreviewed:2

To open the review set, click the title.

2. Within the review set, committee members can review the due date for the review set (1), the documents attached to the review set (2), and the status of the other committee members (3).

**Date: November 4th, 2016** 1

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**My Status**

My Activity Status For Each Review In This Review Set

2

Policy	Status
<a href="#">HIP006 - DISCLOSURE LOGS</a>	✘
<a href="#">Test Policy</a>	✘

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**Members' Status**

Activity Status of All Members of This Review Set for Each Policy

3

	HIP006 - DISCLOSURE LOGS	Test Policy
<b>Austin, Steve</b>	✘	✘
<b>Dorner, Rick</b>	✘	✘
<b>Froman, Abe</b>	✘	✘
<b>Neff, Susie</b>	✘	✘

# Committees and Review Sets

3. With a document due for review open:
  1. Change their status. Options include:
    - i. Not included in this review
    - ii. Not viewed
    - iii. Reviewed with no changes
    - iv. Reviewed with changes
  2. Examine details of the review.
  3. Review the document content.
  4. Review changes to the document (if applicable).
  5. Add new or review existing comments.

**Review Set: Test review**

Details
Comments 5

**Your Status**

1
4 No changes

Status:

Change Status

**Review Details**

Review Properties

<span style="color: red; font-weight: bold;">2</span> Policy Area	Training
Owner	Donaldson, Arial: Dir Clinical Services
Committee Chair	Clark, John: Medical Director
Committee Administrator	Durden, Tyler

Member Status'

Member	Status
Austin, Steve	✘
Dorner, Rick	✘
Froman, Abe	✘
Neff, Susie	✘

3 Current Status: Pending
PolicyStat ID: 23501

Approved: 02/2012

Expires: 2 years after approval

Owner: Arial Donaldson: Dir Clinical

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4. With the content review complete, set the status to the appropriate selection and click the **Change Status** button.

# Committees and Review Sets

## Completing in a Review Set

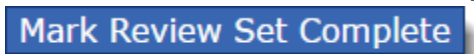
1. When the review set has been completed, click Edit Review Set.



2. Click the **Complete** tab from the Review Set Edit page.



3. Click the **Mark Review Set Complete** button.



This completes the review set for all documents included in the set and is not reversable, so please ensure you are ready to complete it.