

Policy and procedure Manual

Acknowledgements

Purpose

- Provide agency with an easy way to convey policies and procedures to staff.
- The policies are maintained within BOMS and enable staff to review them at any time.
- Administration can verify that staff has reviewed policies.
- This process reduces administrative time in tracking acknowledgments and eliminates individual hard copies of acknowledgements.

Prerequisites

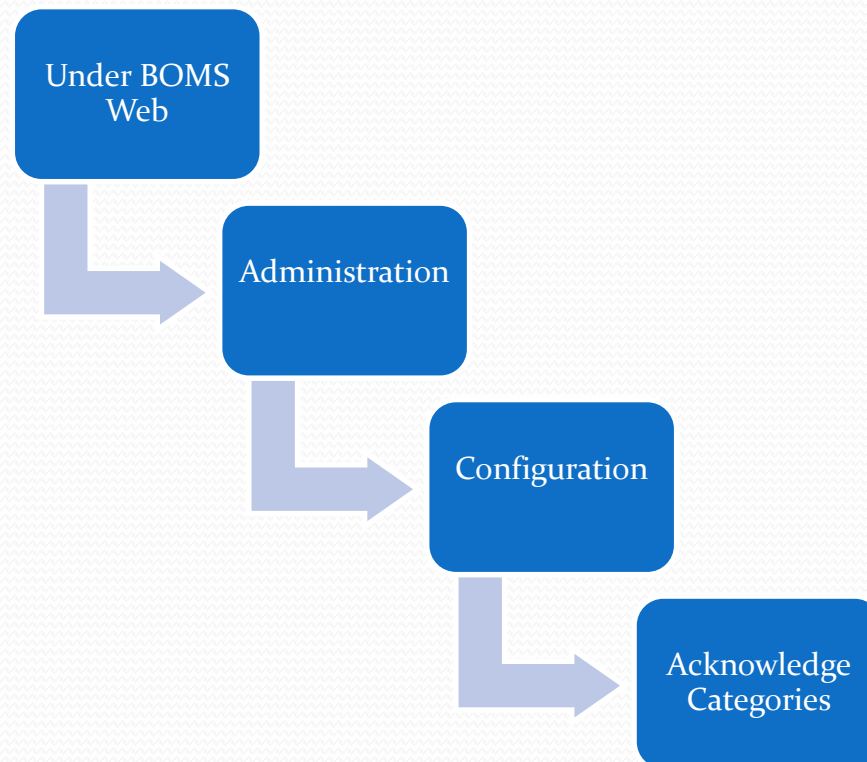
- Imaging Module
 - Agency must have imaging module to be able to use acknowledgement procedure.
- Employee List
 - Prepare a list of employees that reflects which ones get the update and the ones that don't (i.e. task force, volunteers, etc.)
- Documents
 - Have document (policy) ready for upload

Setup

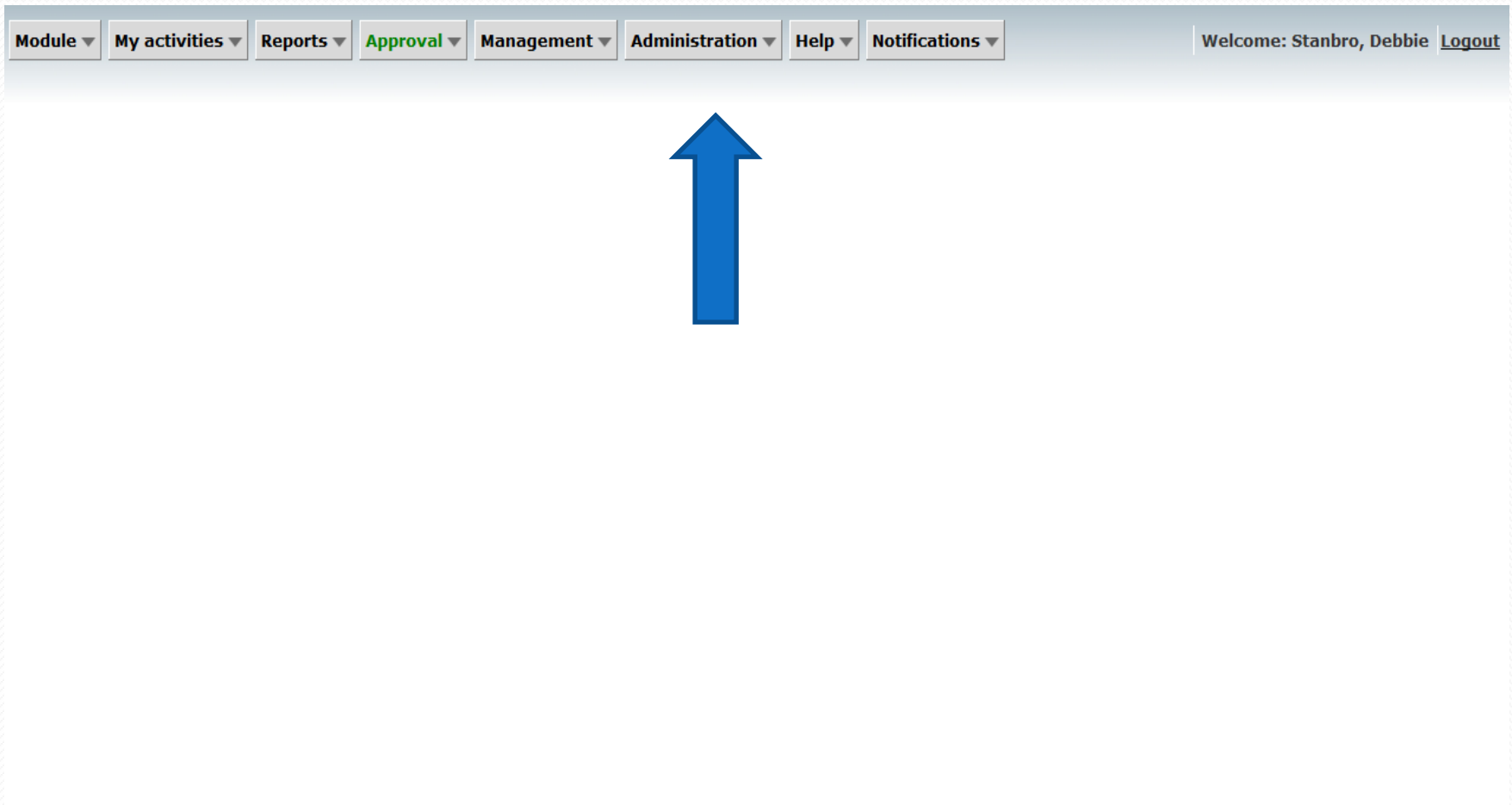
- Two areas must be setup in BOMS before the acknowledgement process can be used.
 - First is the “**Acknowledge Category**”
 - Second is the “**Acknowledge Documents**”

Setup of Acknowledge Categories

- The Category is the general overview where the policy will be reviewed.



Setup Category (screen shots)



- Post evaluations
- Print W-4
- Configurations
- Test authentication
- Inventory update
- Vehicles**
- Pool car mileage
- Pool car expense
- Reopen vehicle log
- Community service



Module ▼ My activities ▼ Reports ▼ Approval ▼ Management ▼ Administration ▼ Help ▼ Notifications ▼

Welcome: Stanbro, Debbie [Logout](#)

Code

Acknowledge categories

Acknowledge documents

Attendance options

Client tool options

Community service event

Course categories

E-mail options

Evaluations

Evaluation rating scales

Exchanges

External data options

Legacy options

Merge documents

Object categories

OPS options

Overtime options

Security options

Travel map mileage

Travel options

Travel reimbursement

Travel scheduled events

Travel types

Timesheet comment type

Unc paths

Setup: Acknowledge categories

Add ±

Edit

Delete

Options ▼

Show: (all) ▼

Category	Methodology	Description	Archive
Office Policies and Procedures	New hires	Office Policies and Procedures	No
Office Policies	Custom list	REAP - Rewarding Employee Achievement Pr...	Yes

Module ▼ My activities ▼ Reports ▼ Approval ▼ Management ▼ Administration ▼ Help ▼ Notifications ▼

Welcome: Stanbro, Debbie [Logout](#)

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Setup: Acknowledge categories

Add ±

Edit

Delete

Options ▼

Show: (all) ▼

Category	Methodology	Description	Archive
Office Policies and Procedures	New hires	Office Policies and Procedures	No
Office Policies	Custom list	REAP - Rewarding Employee Achievement Pr...	Yes

The screenshot displays a software application window titled "Setup: Acknowledge categories". The interface features a sidebar on the left with a list of modules, a top navigation bar with tabs for "Module", "My activities", "Reports", "Approval", "Management", "Administration", "Help", and "Notifications", and a main content area. The "Add" dialog box is open, showing fields for "Category", "Methodology", "Description", and "Archive".

Code	Category	Methodology	Description	Archive
Acknowledge categories	Office Policies and Procedures	New hires	Office Policies and Procedures	No
Acknowledge documents	Office Policies	Custom list	REAP - Rewarding Employee Achievement Pr...	Yes

The "Add" dialog box contains the following fields:

- Category:
- Methodology:
- Description:
- Archive:

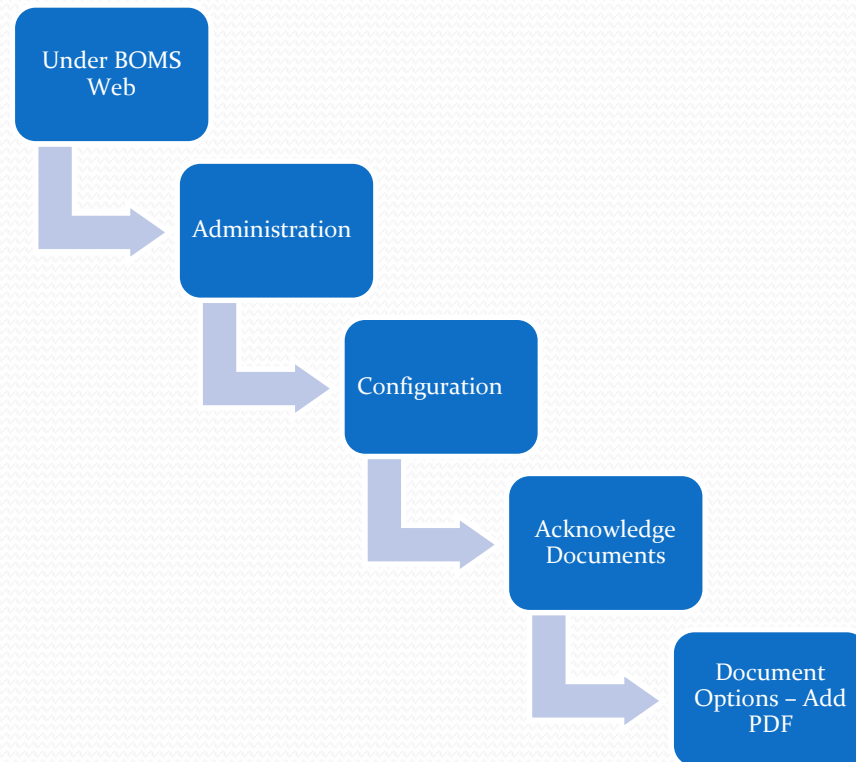
Within the “add box” you must name the category you want to create, Next Methodology needs to be determined - there are two choices

- 1) custom where you can select recipients (example just investigators)
- 2) new hires (where all new hires get the document plus all existing staff that you designate).

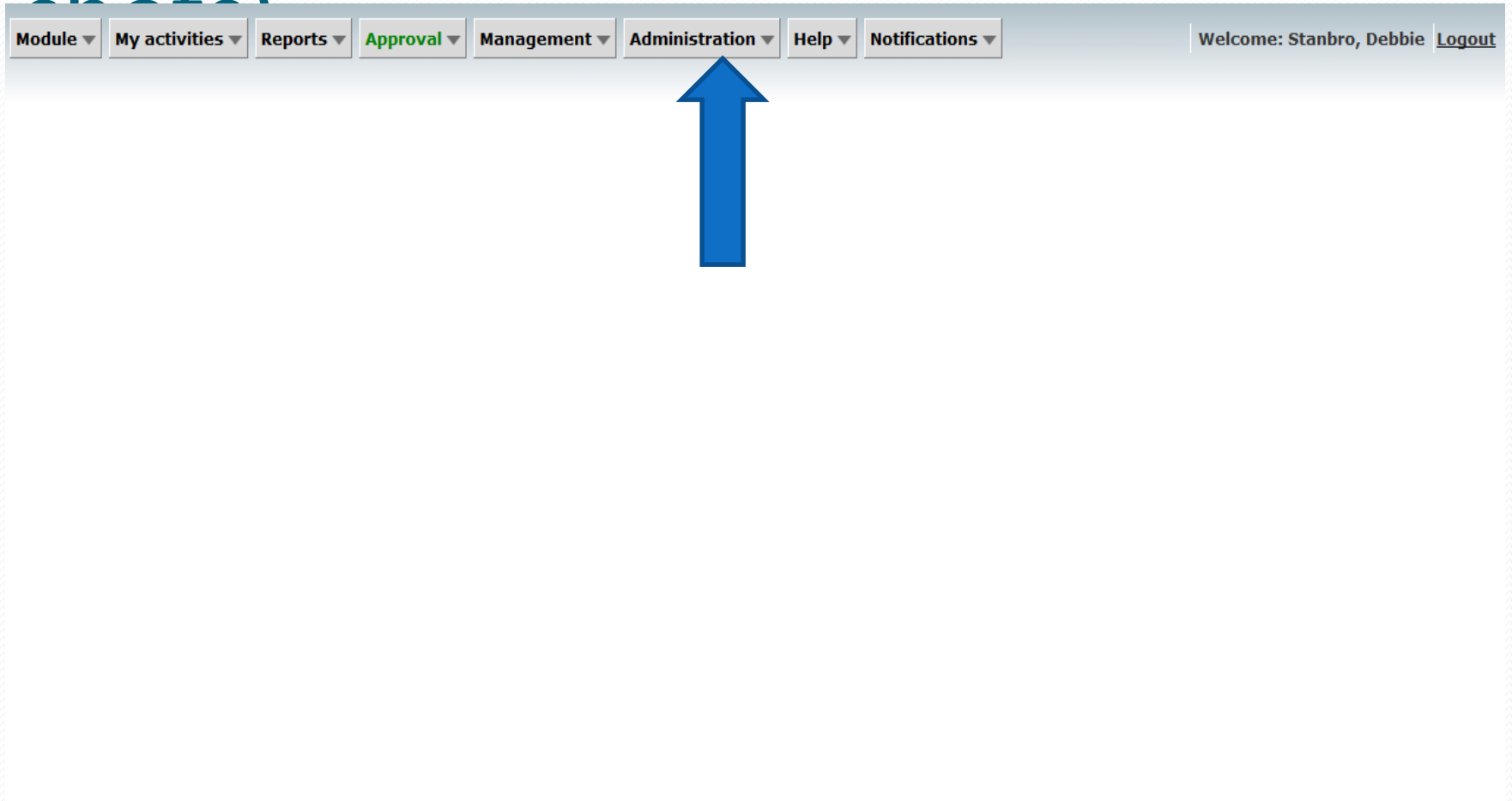
Description of the category and archive fields also need to be completed.

Setup Acknowledgements

- Please note this can only be done after the category has been established (screen shots to follow)



Setup Acknowledgements (screen



Module ▾

My activities ▾

Reports ▾

Approval ▾

Management ▾

Administration ▾

Help ▾

Notifications ▾

Welcome: Stanbro, Debbie [Logout](#)

Post evaluations

Print W-4

Configurations

Test authentication

Inventory update

Vehicles

Pool car mileage

Pool car expense

Reopen vehicle log

Community service



http://172.25.52.64/BOMSWEB/Pages/home.aspx?__SID=cbe2090c-4ace-42e6-8b0d-908e42eb...



10:04 AM
10/8/2014

- Code
- Acknowledge categories
- Acknowledge documents**
- Attendance options
- Client tool options
- Community service event
- Course categories
- E-mail options
- Evaluations
- Evaluation rating scales
- Exchanges
- External data options
- Legacy options
- Merge documents
- Object categories
- OPS options
- Overtime options
- Security options
- Travel map mileage
- Travel options
- Travel reimbursement
- Travel scheduled events
- Travel types
- Timesheet comment type
- Unc paths

1 of 4

Documents options ▾

Send to options ▾

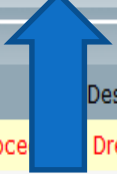
Pending review

Layout ▾

Show: (active) ▾

Setup acknowledges

Category	Description
Office Polcies and Proce	Dress Code
Office Polcies and Procedures	Drivers Training
Office Polcies and Procedures	E-Cigarettes
Office Polcies and Procedures	Policy and Procedure Manual



Send to

<input type="checkbox"/>	Name	since date	Downloaded
<input checked="" type="checkbox"/>	Albers, Jordan T.	10/03/2014 01:48 PM	
<input type="checkbox"/>	Alderman, Bonita J.	10/03/2014 01:48 PM	
<input type="checkbox"/>	Anderson, Shaina J.	10/03/2014 01:48 PM	
<input type="checkbox"/>	Anderson, Susan L.	10/03/2014 01:48 PM	
<input type="checkbox"/>	Baas, Patricia A.	10/03/2014 01:48 PM	
<input type="checkbox"/>	Baker, Marcia H.	10/03/2014 01:48 PM	
<input type="checkbox"/>	Baker, Nancy L.	10/03/2014 01:48 PM	
<input type="checkbox"/>	Basit, Nabeel K.	10/03/2014 01:48 PM	

Capture region

[Open pdf](#) ➤

ModuleMy activitiesReportsApprovalManagementAdministrationHelpNotifications

Welcome: Stanbro, DebbieLogout

Code

Acknowledge categories

Acknowledge documents

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Community service event

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Merge documents

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Security options

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Travel reimbursement

Travel scheduled events

Travel types

Timesheet comment type

Unc paths

User functions

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Documents options

Send to options

Pending review

Layout

Show: (active)

Setup acknowledge

Category

Office Pol

Office Pol

Office Pol

Office Pol

Add PDF

Add Flash

Add MPEG-4

Add Windows media video

Delete

Copy as

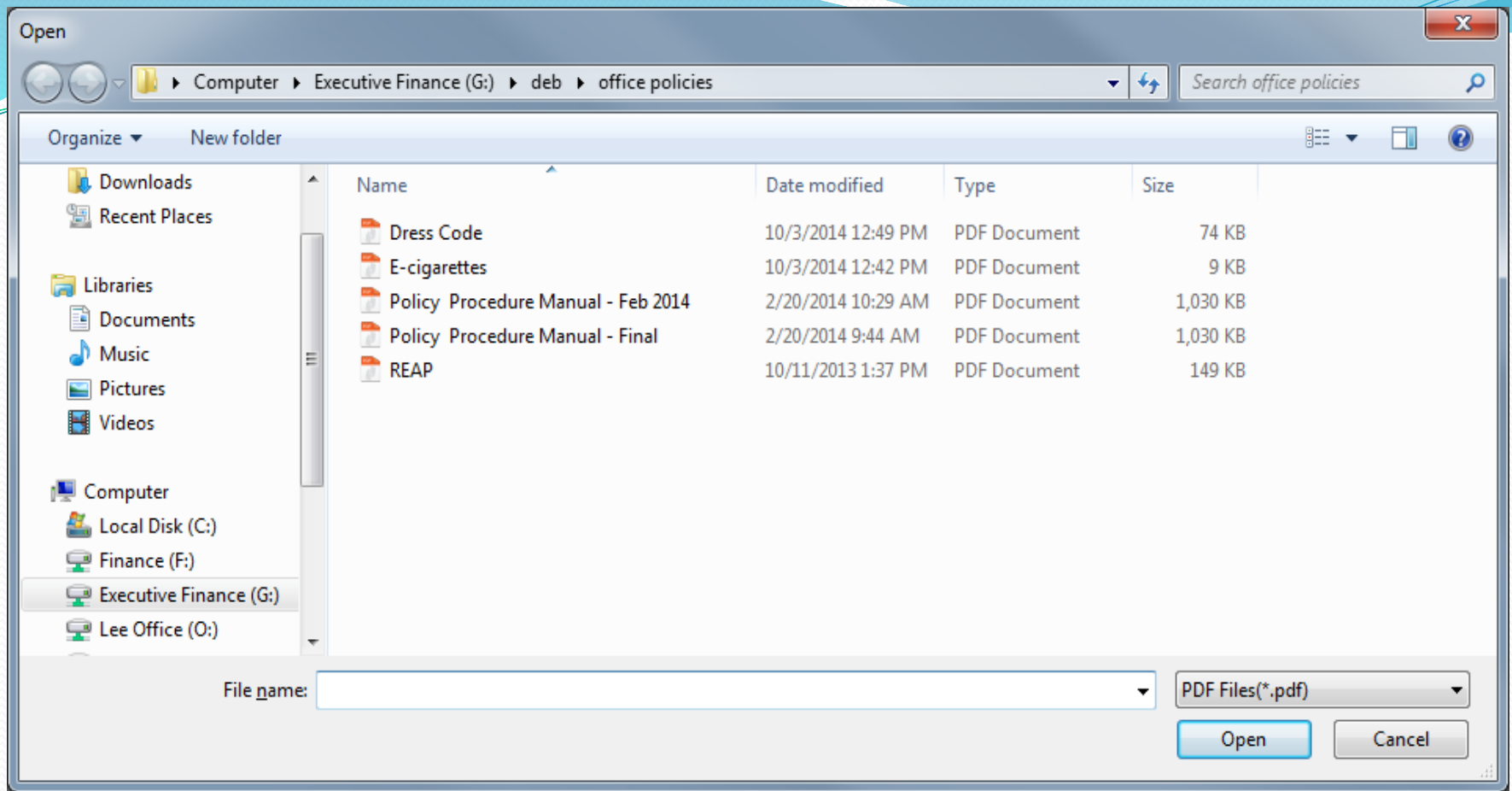
Edit

Export to excel

Open pdf

Send to

<input type="checkbox"/>	Name	since date	Download
<input checked="" type="checkbox"/>	Albers, Jordan T.	10/03/2014 01:48 PM	
<input type="checkbox"/>	Alderman, Bonita J.	10/03/2014 01:48 PM	
<input type="checkbox"/>	Anderson, Shaina J.	10/03/2014 01:48 PM	
<input type="checkbox"/>	Anderson, Susan L.	10/03/2014 01:48 PM	
<input type="checkbox"/>	Baas, Patricia A.	10/03/2014 01:48 PM	
<input type="checkbox"/>	Baker, Marcia H.	10/03/2014 01:48 PM	
<input type="checkbox"/>	Baker, Nancy L.	10/03/2014 01:48 PM	
<input type="checkbox"/>	Basit, Nabeel K.	10/03/2014 01:48 PM	



System then asks you where the file is that you want to upload.

Module ▾My activities ▾Reports ▾Approval ▾Management ▾Administration ▾Help ▾Notifications ▾

Welcome: Stanbro, Debbie [Logout](#)

CancelSave

Category

Not Defined ▾

Description

Effective from

...

Effective thru

...

Important

No ▾

Archived

No ▾

Complete the above information:

- Category
- Description (name of policy)
- Effective date
- Thru date (not necessary to put in a date)
- Important field: this should be **yes** as this indicates to the employee that they have a document out there to be acknowledged
- Archive can be clicked to yes if you want the document archived off.

Module ▾My activities ▾Reports ▾Approval ▾Management ▾Administration ▾Help ▾Notifications ▾

Welcome: Stanbro, Debbie [Logout](#)

Code

Acknowledge categories

Acknowledge documents

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Travel options

Travel reimbursement

Travel scheduled events

Travel types

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Unc paths

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Documents options ▾

Send to options ▾

Pending review

Layout ▾

Show: (active) ▾

Setup acknowledges

Category	Description
Office Polcies and Procedures	Dress Code
Office Polcies and Procedures	Drivers Training
Office Polcies and Procedures	E-Cigarettes
Office Polcies and Procedures	Policy and Procedure Manual

Send to

since date	Downloaded	Reviewed
03/26/2014 09:09 AM	06/09/2014 04:02 PM	06/09/2014 04:02 PM
02/20/2014 10:32 AM	03/25/2014 07:52 AM	03/25/2014 07:53 AM
04/22/2014 12:04 PM	06/22/2014 07:00 PM	06/22/2014 06:59 PM
02/20/2014 10:32 AM	06/12/2014 08:15 AM	06/12/2014 08:15 AM
02/20/2014 10:32 AM	09/02/2014 12:02 PM	03/14/2014 10:26 AM
02/20/2014 10:32 AM	03/14/2014 03:09 PM	03/14/2014 03:09 PM
02/20/2014 10:32 AM	06/11/2014 09:41 AM	06/11/2014 09:41 AM
02/20/2014 10:32 AM	06/17/2014 08:48 AM	06/17/2014 08:50 AM
02/20/2014 10:32 AM	06/09/2014 10:52 AM	06/09/2014 10:52 AM

[Open pdf](#)

Module

My activities

Reports

Approval

Management

Administration

Help

Notifications

Welcome: Stanbro, DebbieLogout

Code

Acknowledge categories

Acknowledge documents

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Timesheet comment type

Unc paths

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Documents options

Send to options

Pending review

Layout

Show: (active)

Setup acknowledges

Category

Description

Office Policies and Procedures Dress

Office Policies and Procedures Drivers Training

Office Policies and Procedures E-Cigarettes

Office Policies and Procedures Policy and Procedure Manual

Send to

☐

Name

since date

Downloaded

☒

Albers, Jordan T.

10/03/2014 01:48 PM

☐

Alderman, Bonita J.

10/03/2014 01:48 PM

☐

Anderson, Shaina J.

10/03/2014 01:48 PM

☐

Anderson, Susan L.

10/03/2014 01:48 PM

☐

Baas, Patricia A.

10/03/2014 01:48 PM

☐

Baker, Marcia H.

10/03/2014 01:48 PM

☐

Baker, Nancy L.

10/03/2014 01:48 PM

☐

Basit, Nabeel K.

10/03/2014 01:48 PM

Open pdf

http://172.25.52.64/BOMSWEB/Pages/setuplist_acknowledge.aspx?_SID=4e913728-f231-4a8...

Code

Acknowledge categories
Acknowledge documents
 Attendance options
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 Community service event
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 Travel reimbursement
 Travel scheduled events
 Travel types
 Timesheet comment type
 Unc paths

Documents options ▼

Send to options ▼

Pending review

Layout ▼

Show: (active) ▼

Include members

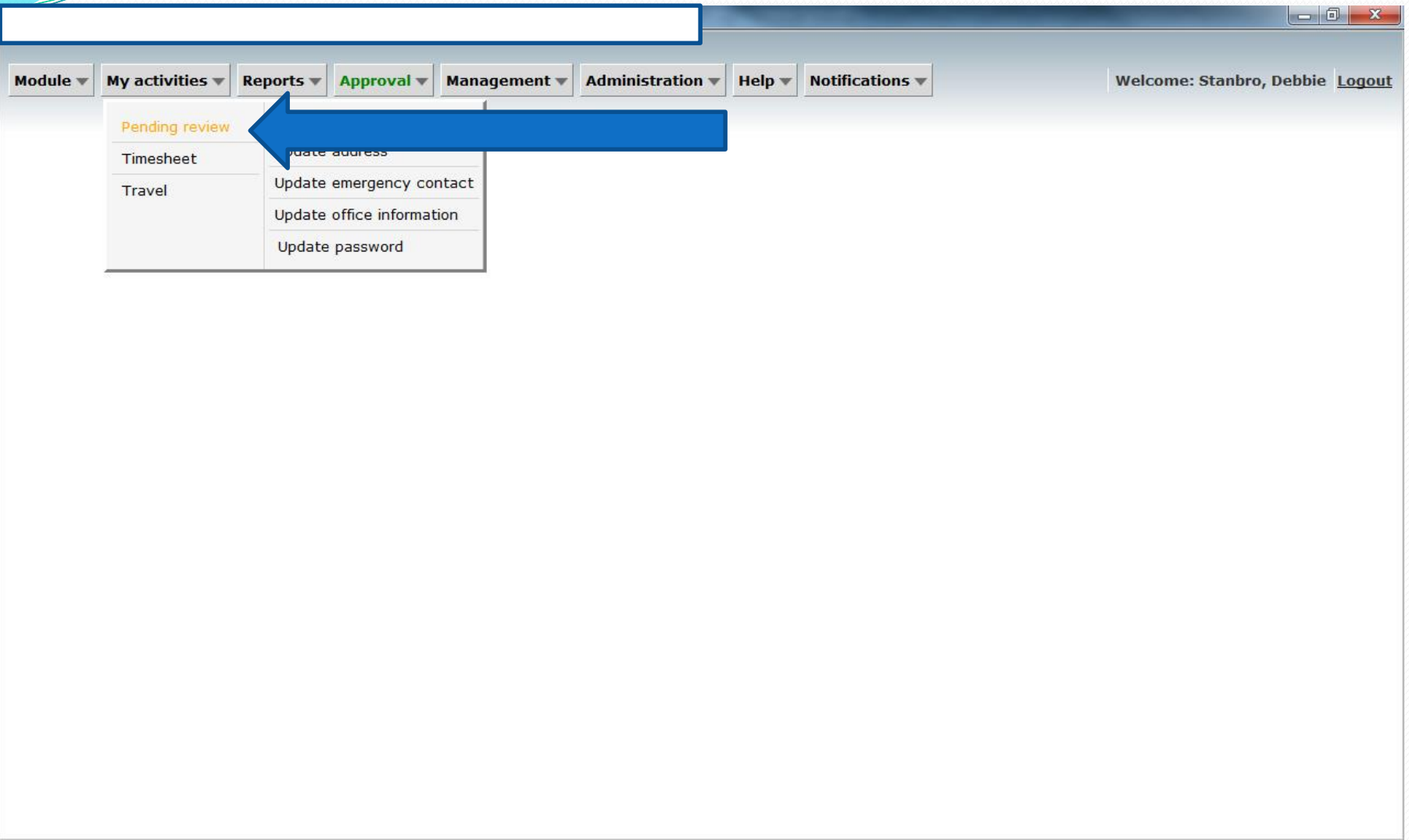
Cancel Save

<input type="checkbox"/>	Name	Status	Department	Class	State vehicle
<input type="checkbox"/>	Carr, Michael E.	V	E.C.U.	0	
<input type="checkbox"/>	Draffone, Theresa A.	V	Intelligence	0	
<input type="checkbox"/>	Gagnon, Laura M.	P	Misdemeanor	6111	
<input type="checkbox"/>	Greene, Meghan O.	V	Felony	0	
<input type="checkbox"/>	Harris, Angela D.	P	Administration	6002	
<input type="checkbox"/>	Higdon, Darion K.	V	E.C.U.	0	
<input type="checkbox"/>	Holland, George M.	V	Career Criminal	0	
<input type="checkbox"/>	Hughes, Mary Ellen	V	Career Criminal	0	
<input type="checkbox"/>	Jaffarian, Robert J.	V	Career Criminal	0	
<input type="checkbox"/>	Kerns, Todd A.	V	Career Criminal	0	
<input type="checkbox"/>	Luster, Erica D.	P	Juvenile	6002	
<input type="checkbox"/>	Macera, Stephen F.	V	E.C.U.	0	
<input type="checkbox"/>	Nichols, Heather J.	V	E.C.U.	0	
<input type="checkbox"/>	Peck, Dean	V	Intelligence	0	
<input type="checkbox"/>	Raphael, Gene G.	V	Intelligence	0	

The “Include Members” screen comes up this is where you can click on those staff members that should receive the policy. Once done click save and the documents will be forwarded

Baker, Marcia H. 10/03/2014 01:58 PM
 Baker, Nancy L. 10/03/2014 01:58 PM
 Basit, Nabeel K. 10/03/2014 01:58 PM

What Does Employee See



The screenshot shows a web application interface with a top navigation bar containing dropdown menus for Module, My activities, Reports, Approval, Management, Administration, Help, and Notifications. A user greeting 'Welcome: Stanbro, Debbie' and a 'Logout' link are on the right. Below the navigation bar is a sub-menu with '1 of 2', 'Reviewed', 'Download files', 'Layout', and 'Show: Pending review'. A large blue arrow points from the 'Show: Pending review' button to a text box on the right. The main content area is titled 'Documents' and contains a table with two rows: 'Dress Code' (highlighted in yellow) and 'E-Cigarettes' (highlighted in light red). A blue arrow points from the 'Dress Code' row to a text box at the bottom. To the right of the table is a blue 'Open pdf' link with a right-pointing arrow.

Module ▾ My activities ▾ Reports ▾ Approval ▾ Management ▾ Administration ▾ Help ▾ Notifications ▾

Welcome: Stanbro, Debbie [Logout](#)

1 of 2 Reviewed Download files Layout ▾ Show: Pending review ▾

Documents

<input type="checkbox"/>	Description	Downloaded
<input type="checkbox"/>	Dress Code	
<input type="checkbox"/>	E-Cigarettes	

[Open pdf](#) ▶

Please note the pending review button must be showing for staff to see items that are pending.

Employee can click open.pdf to review item and then they MUST click on the reviewed button. This verify they read the policy.

Reviewing policy(employees)

Module ▾ My activities ▾ Reports ▾ Approval ▾ Management ▾ Administration ▾ Help ▾ Notifications ▾

Welcome: Stanbro, Debbie [Logout](#)

2 of 2 Reviewed Download files Layout ▾ Show: Reviewed ▾

Documents

<input type="checkbox"/>	Description	Downloaded
<input type="checkbox"/>	Drivers Training	06/09/2014 01:01 PM
<input checked="" type="checkbox"/>	Policy and Procedure Manual	06/09/2014 01:01 PM

Once policy are review they can be viewed any time clicking on the “Show: Reviewed”.

[Open pdf](#) ▶

Reporting Functions

- Program is setup so the administrators can either view on screen or run reports verifying who has reviewed the policy and when.

On Screen Verification showing who has not review policy

4 of 4 Documents options Send to options Pending review Layout Show: (active)

Setup acknowledges

Category	Description
Office Policies and Procedures	Dress Code
Office Policies and Procedures	Drivers Training
Office Policies and Procedures	E-Cigarettes
Office Policies and Procedures	Policy and Procedure Manual

Send to

Name	since date	Downloaded
Nygaard, James C.	03/26/2014 09:09 AM	06/09/2014 04:
Gilmer, Carrie W.	02/20/2014 10:32 AM	03/25/2014 07:
Parrott, Shannon M.	04/22/2014 12:04 PM	06/22/2014 07:
Williams, Lauren A.	02/20/2014 10:32 AM	06/12/2014 08:
Garofalo, Lisa M.	02/20/2014 10:32 AM	09/02/2014 12:
Nichols, Robert A.	02/20/2014 10:32 AM	03/14/2014 03:
Ortolaza, Ruth	02/20/2014 10:32 AM	06/11/2014 09:
Grochowski, John F.	02/20/2014 10:32 AM	06/17/2014 08:
Moreland, Yolanda M.	02/20/2014 10:32 AM	06/09/2014 10:

Under Employee-> Administration-> Configuration-> Acknowledge documents-> Select the policy And click pending review

Highlight the policy you want to review, then the “pending review” will show those people who have not reviewed policy.

Shows staff that didn't review

The screenshot shows a web application interface with a sidebar on the left containing a list of modules. The main content area displays a table titled 'Pending Review'. Above the table are two buttons: 'Close' and 'Excel'. A blue arrow points from the 'Excel' button to a text box on the right. The table contains three rows of data, all with the same description 'Anti-Harassment/Discrimination'.

Module ▾ My acti

Code

Acknowledge categor

Acknowledge docume

Attendance options

Client tool options

Community service e

Course categories

E-mail options

Evaluations

Evaluation rating sca

Exchanges

External data options

Image categories

Legacy options

Merge documents

OPS options

Overtime options

Security options

Travel map mileage

Travel options

Travel reimbursemen

Travel scheduled events

172.25.1.64/bomsweb/Pages/setuplist_acknowledge.aspx?__SID=6f346a13-9ac2-4285-b102-fda7e64f0b2b

Welcome, Stephen, Debbie Logout

Pending Review

Close Excel

Category Description Sent to

Acknowledgement Form Anti-Harassment/Discrimination Feinberg, Daniel P.

Acknowledgement Form Anti-Harassment/Discrimination Greene, Meghan O.

Acknowledgement Form Anti-Harassment/Discrimination Russell, Stephen B.

This information can be download into excel.

On Screen Verification

http://172.25.52.64/?_SID=4e913728-f231-4a86-923e-74096240f98d - BOMS 11.32 - Windows Internet Explorer

Module ▼ My activities ▼ Reports ▼ **Approval** ▼ Management ▼ Administration ▼ Help ▼ Notifications ▼

Welcome: Stanbro, Debbie [Logout](#)

Code

- Acknowledge categories
- Acknowledge documents**
- Attendance options
- Client tool options
- Community service event
- Course categories
- E-mail options
- Evaluations
- Evaluation rating scales
- Exchanges
- External data options
- Legacy options
- Merge documents
- Object categories
- OPS options
- Overtime options
- Security options
- Travel map mileage
- Travel options
- Travel reimbursement
- Travel scheduled events
- Travel types
- Timesheet comment type
- Unc paths

4 of 4 Documents options ▼ Send to options ▼ Pending review Layout ▼ Show: (active) ▼

Setup acknowledgements

Category	Description
Office Policies and Procedures	Dress Code
Office Policies and Procedures	Drivers Training
Office Policies and Procedures	E-Cigarettes
Office Policies and Procedures	Policy and Procedure Manual

Send to

Name	since date	Downloaded
Nygaard, James C.	03/20/2014 09:09 AM	06/09/2014 04:00
Gilmer, Carrie W.	02/20/2014 10:32 AM	03/25/2014 07:00
Parrott, Shannon M.	04/22/2014 12:04 PM	06/22/2014 07:00
Williams, Lauren A.	02/20/2014 10:32 AM	06/12/2014 08:00
Garofalo, Lisa M.	02/20/2014 10:32 AM	09/02/2014 12:00
Nichols, Robert A.	02/20/2014 10:32 AM	03/14/2014 03:00
Ortolaza, Ruth	02/20/2014 10:32 AM	06/11/2014 09:00
Grochowski, John F.	02/20/2014 10:32 AM	06/17/2014 08:00
Moreland, Yolanda M.	02/20/2014 10:32 AM	06/09/2014 10:00

Under Employee-> Administration-> Configuration-> Acknowledge documents-> Select the policy

Highlight the policy you want to review, the bottom box “send to” area shows all staff that received policy, date sent to them, date it was downloaded, date it was reviewed(and time).



Enhancements needed

- Larger text on screen
- Easier Reporting Features