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

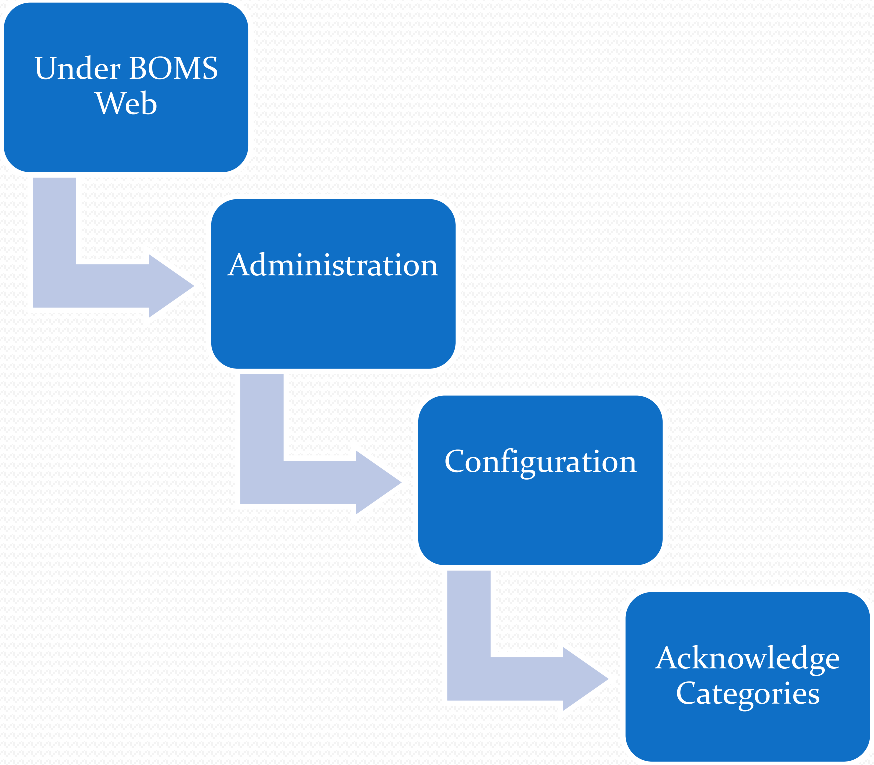
- Imaging Module
  - Agency must have imaging module to be able to use acknowledgement procedure.
- Employee List
  - Prepare a list of employees that reflects which ones get the update and the ones that don’t (i.e. task force, volunteers, etc.)
- Documents
  - Have document (policy)ready for upload

Setup

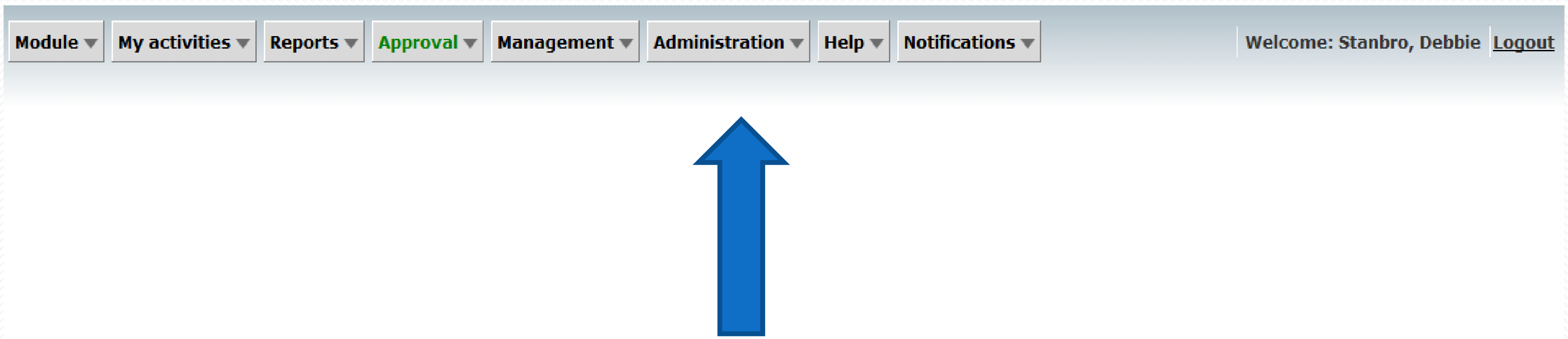
- Two areas must be setup in BOMS before the acknowledgement process can be used.
  - First is the “**Acknowledge Category**”
  - Second is the “**Acknowledge Documents**”

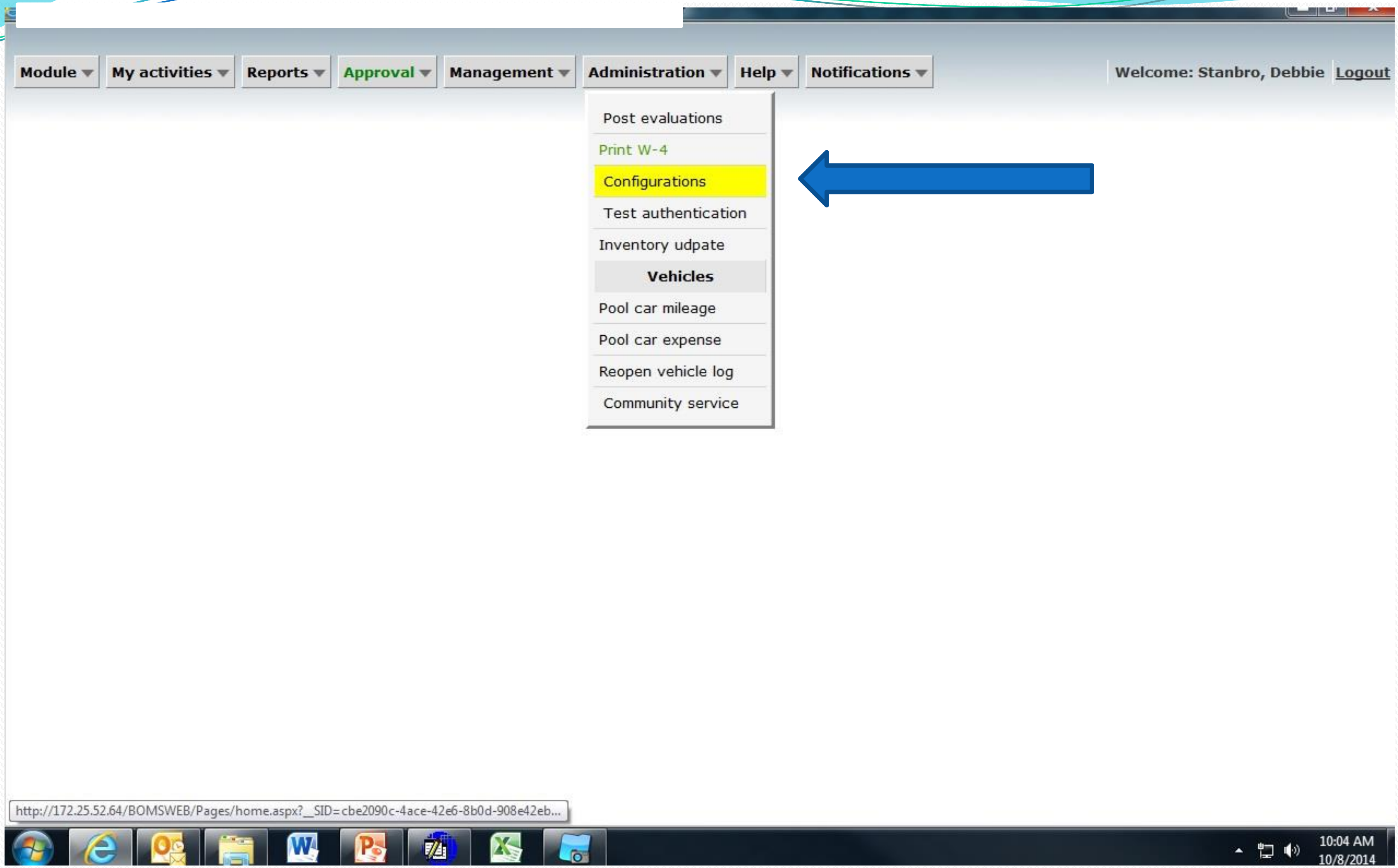
Setup of Acknowledge Categories

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



Setup Category (screen shots)

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Notifications
Welcome: Stanbro, Debbie
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Post evaluations
Print W-4
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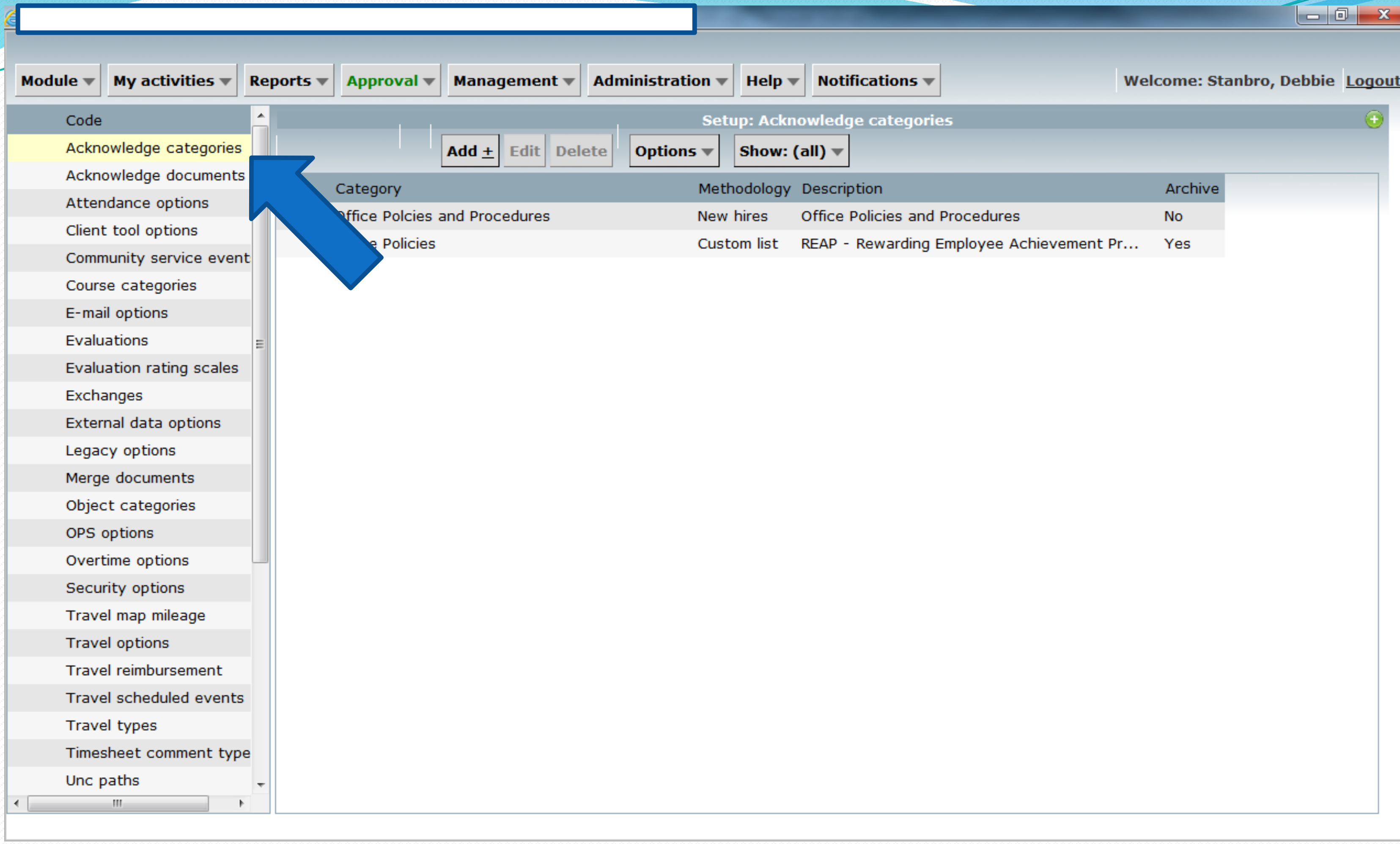
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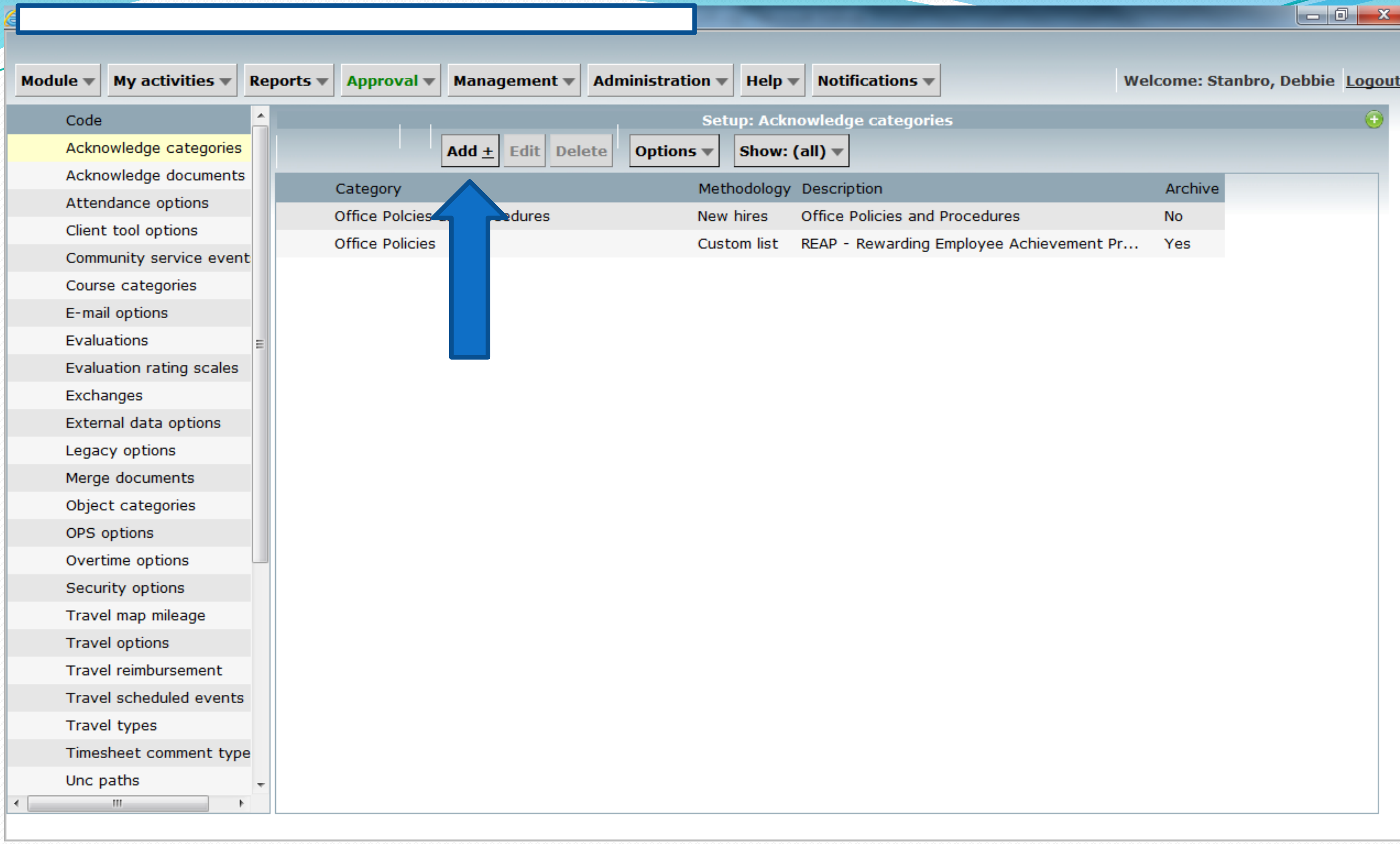
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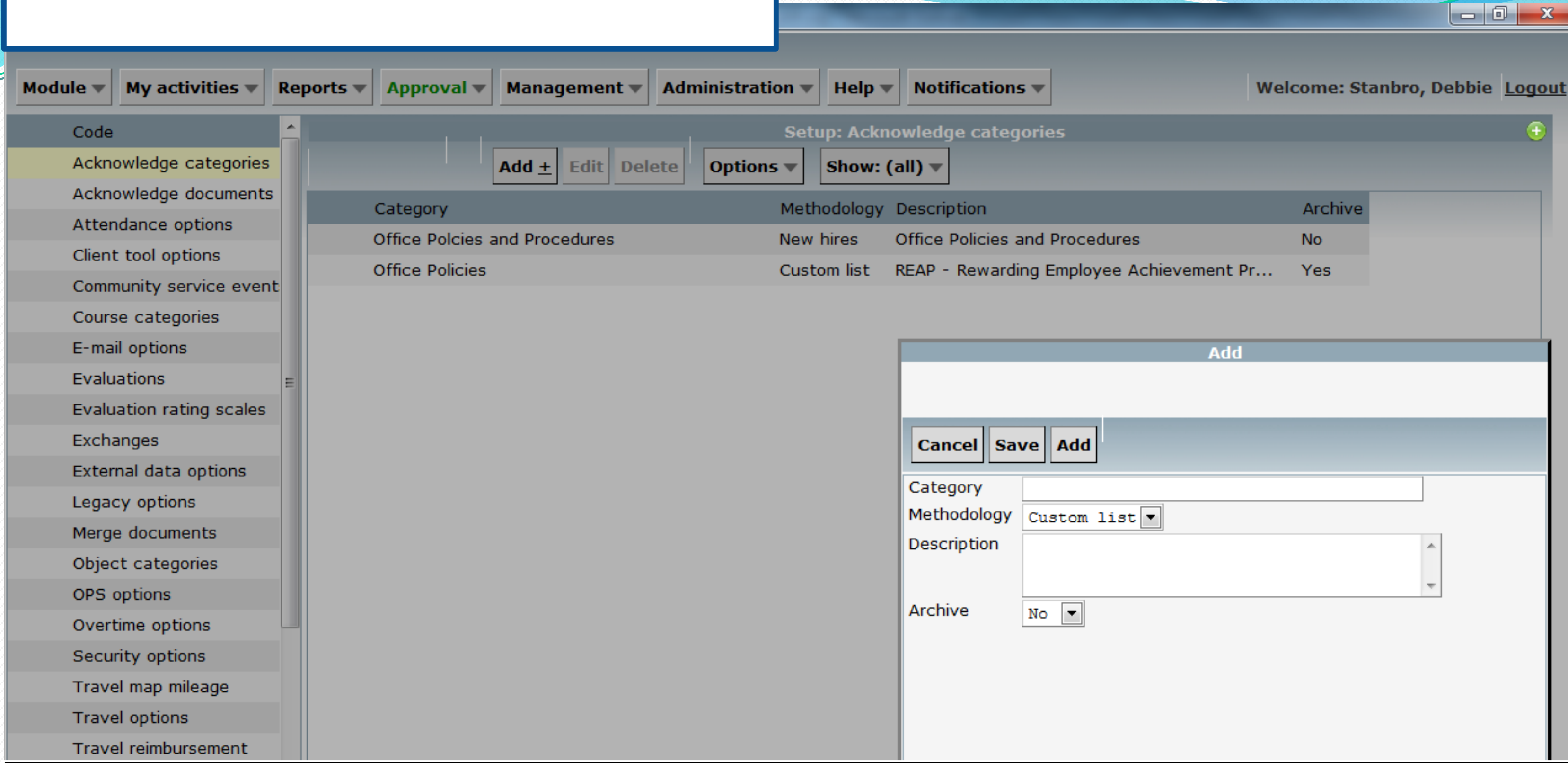


Within the “add box” you must name the category you want to create, Next Methodology needs to be determined - there are two choices

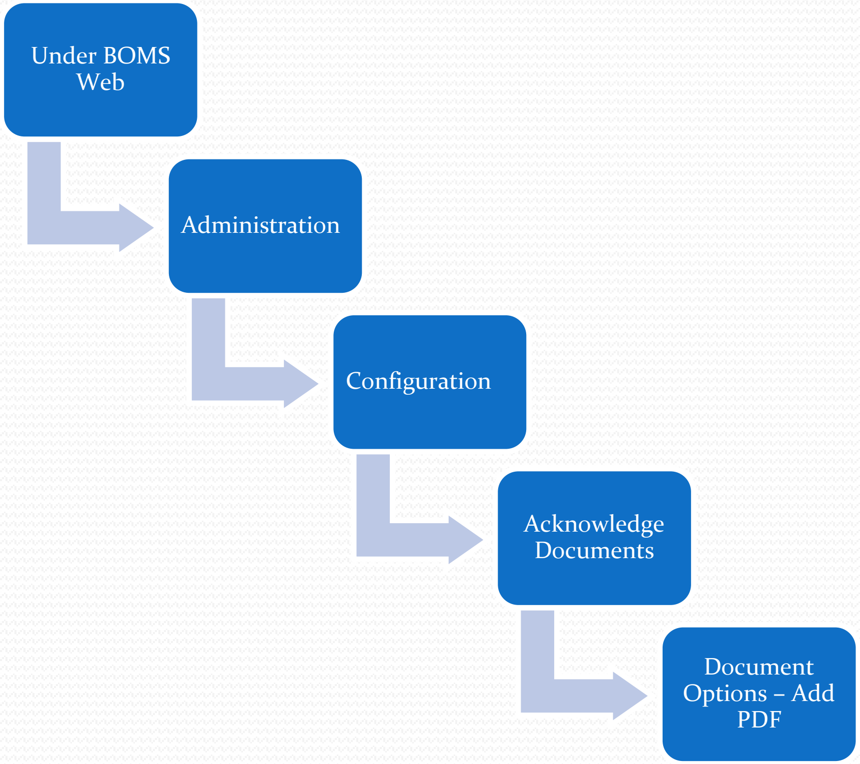
1) custom where you can select recipients (example just investigators)

2) new hires(where all new hires get the document plus all existing staff that you designate).

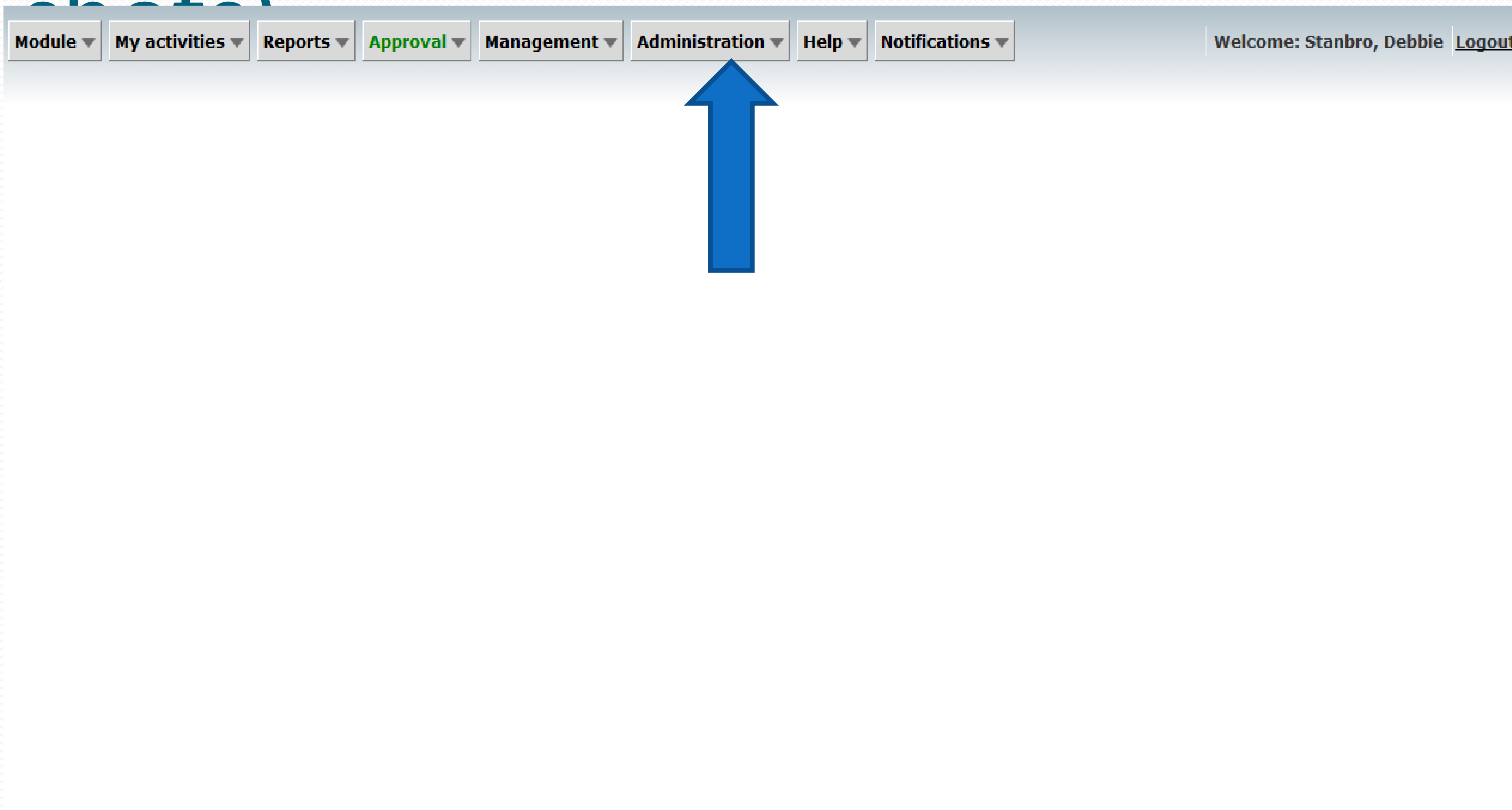
Description of the category and archive fields also need to be completed.

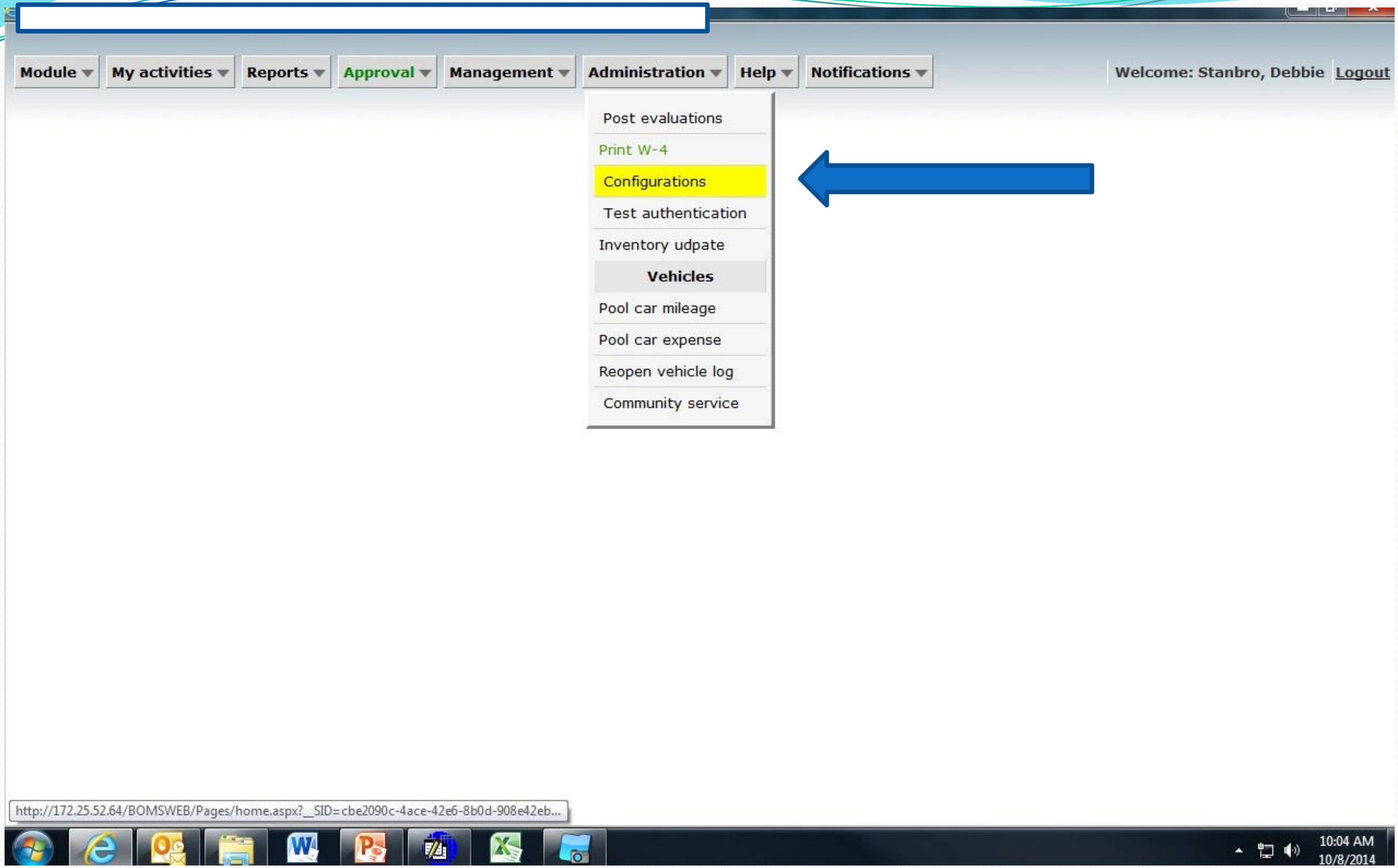
Setup Acknowledgements

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



Setup Acknowledgements (screen shot)

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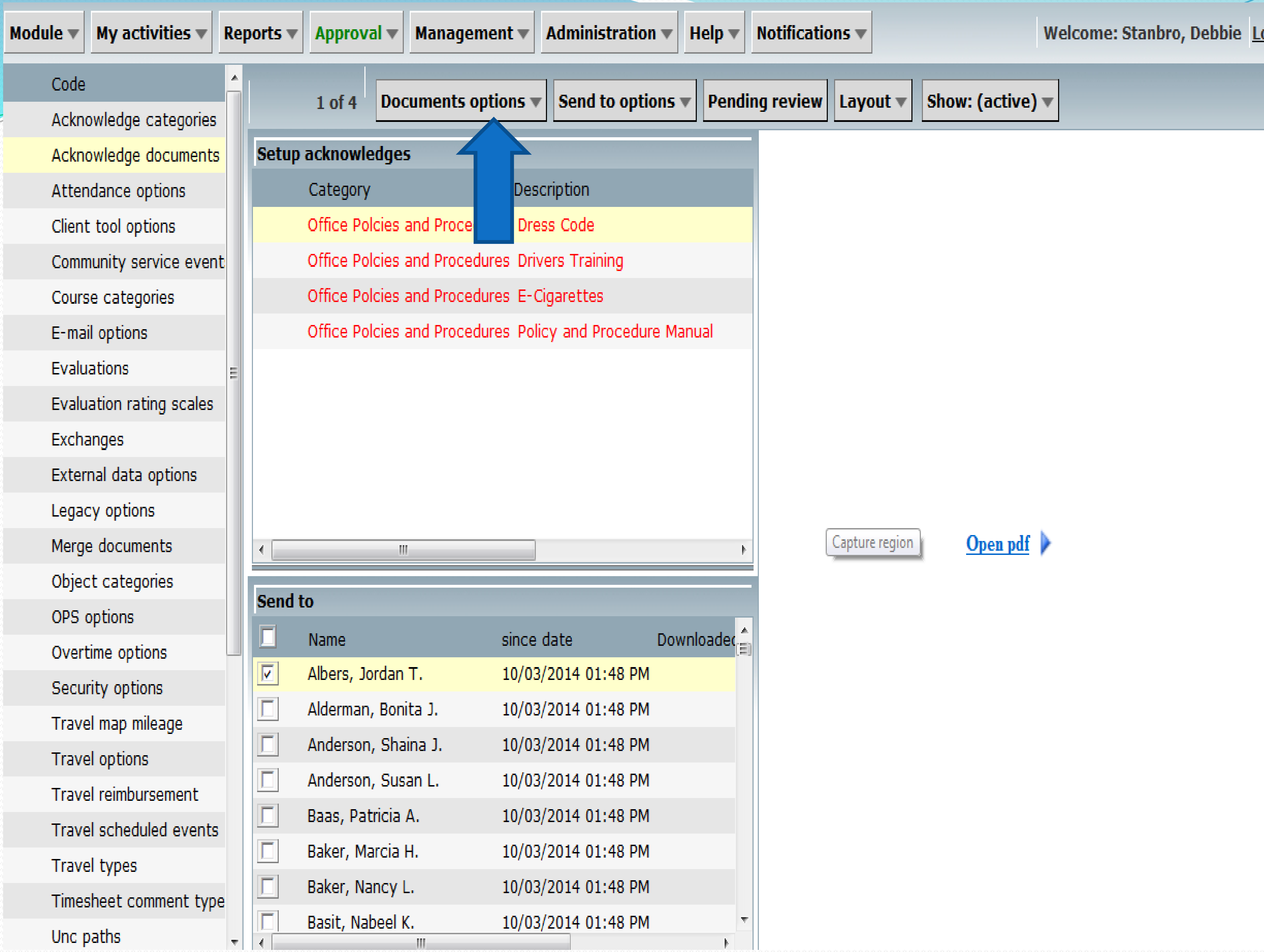
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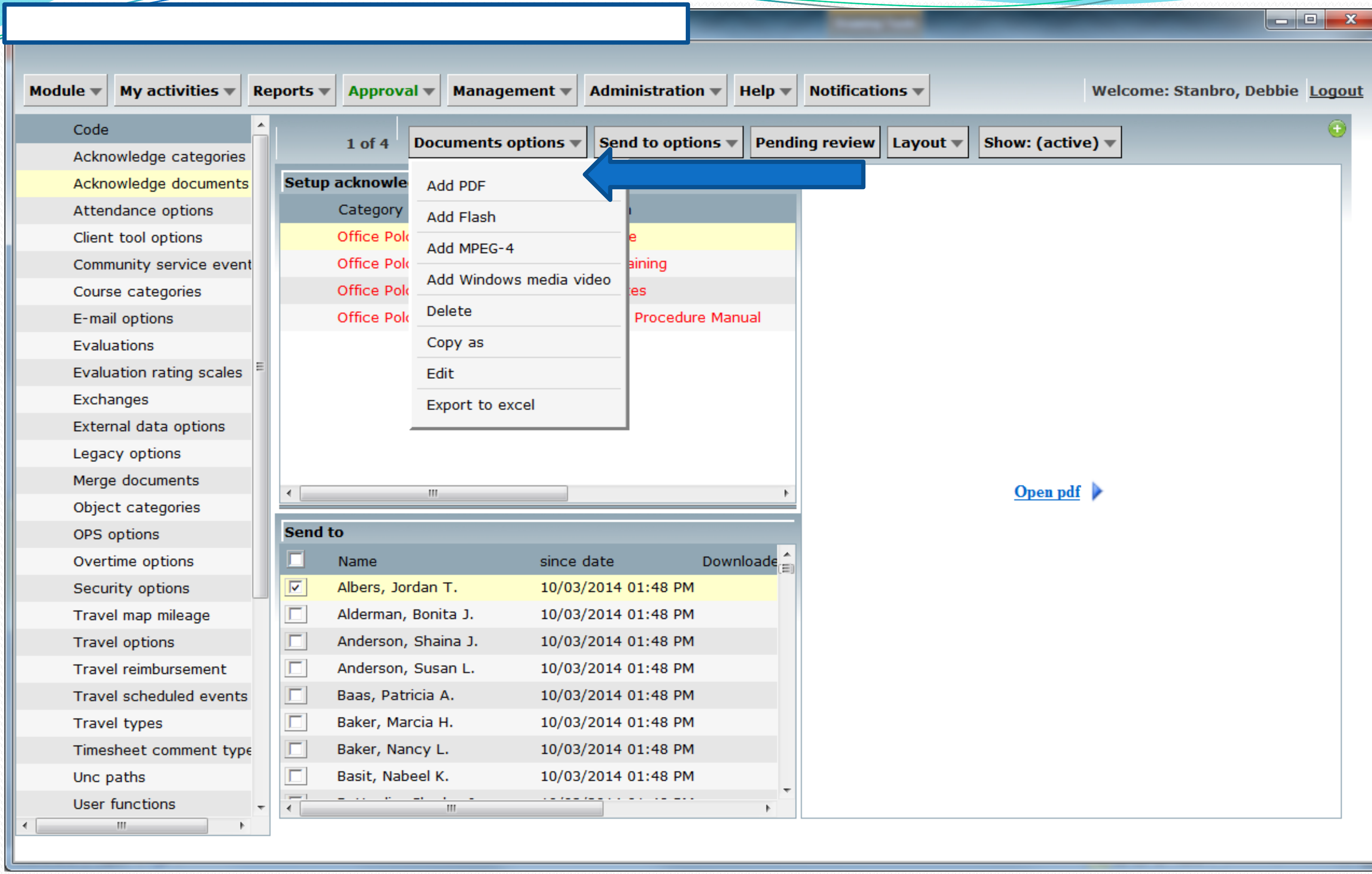
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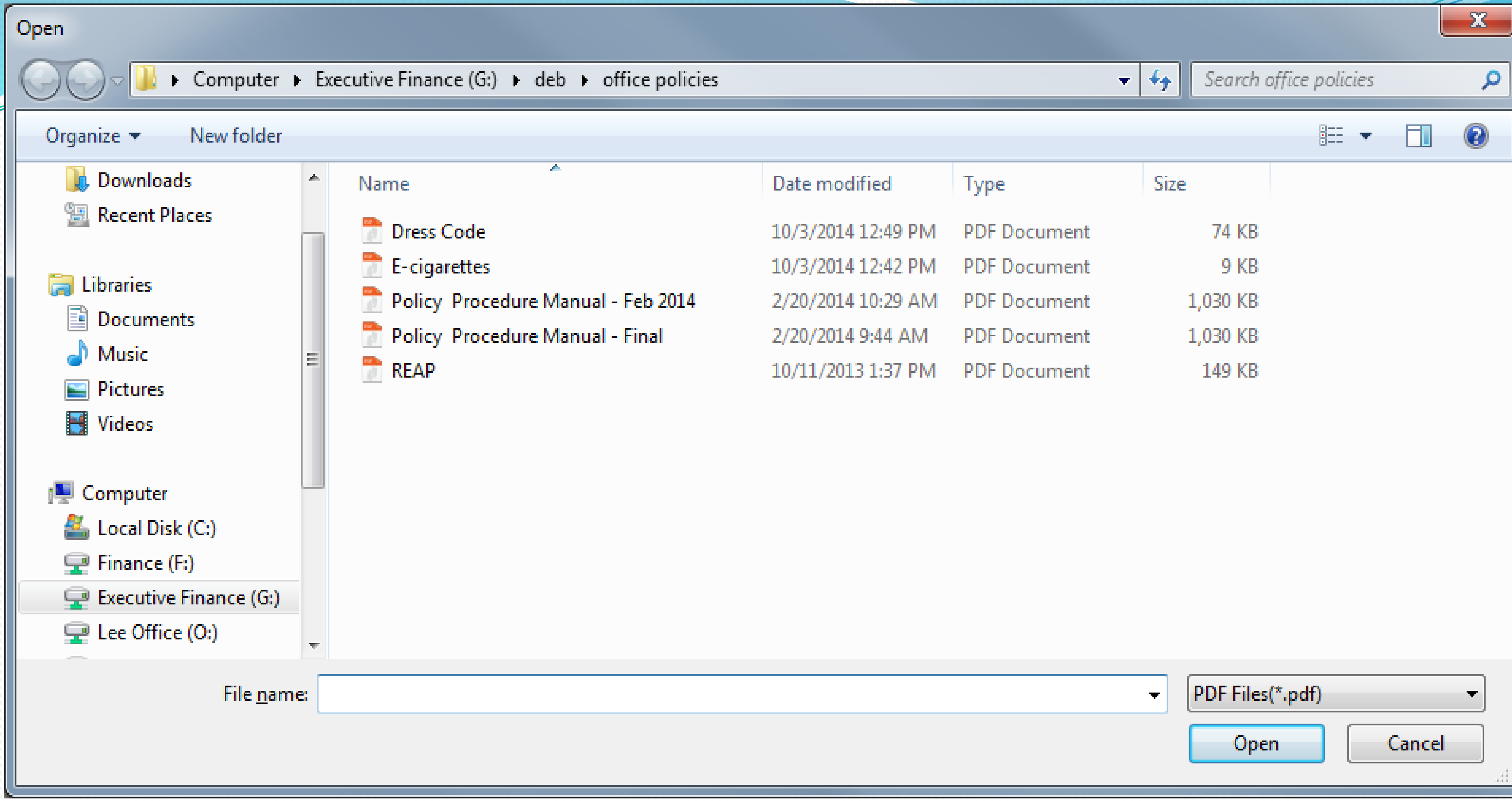
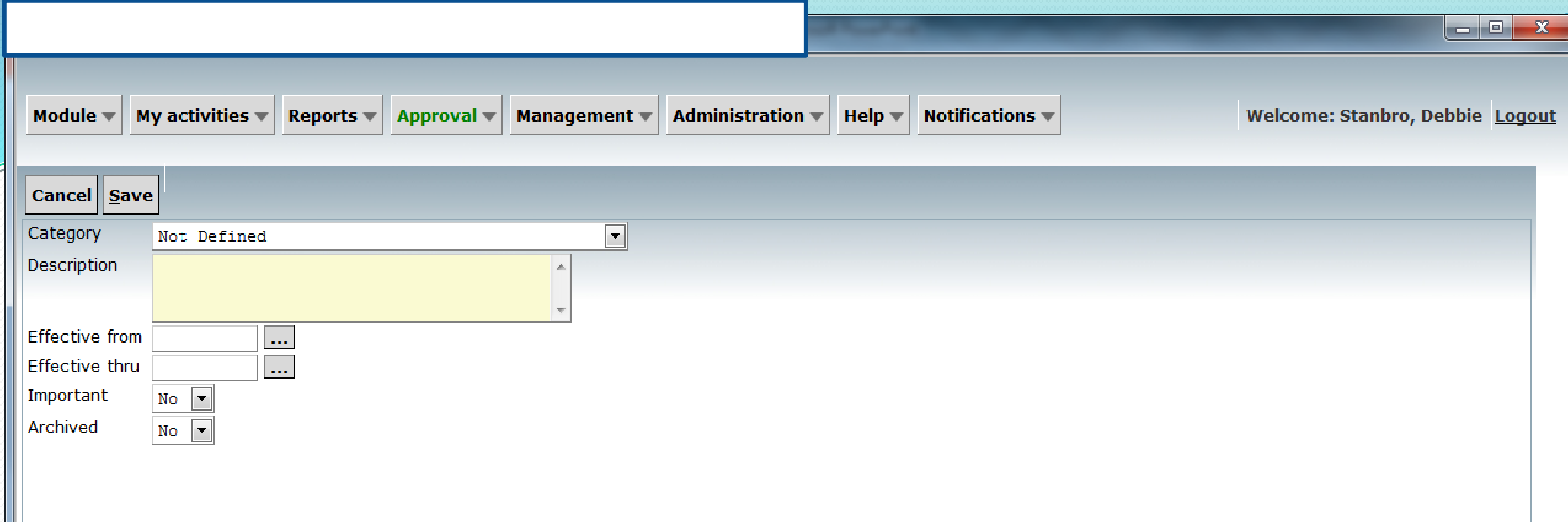
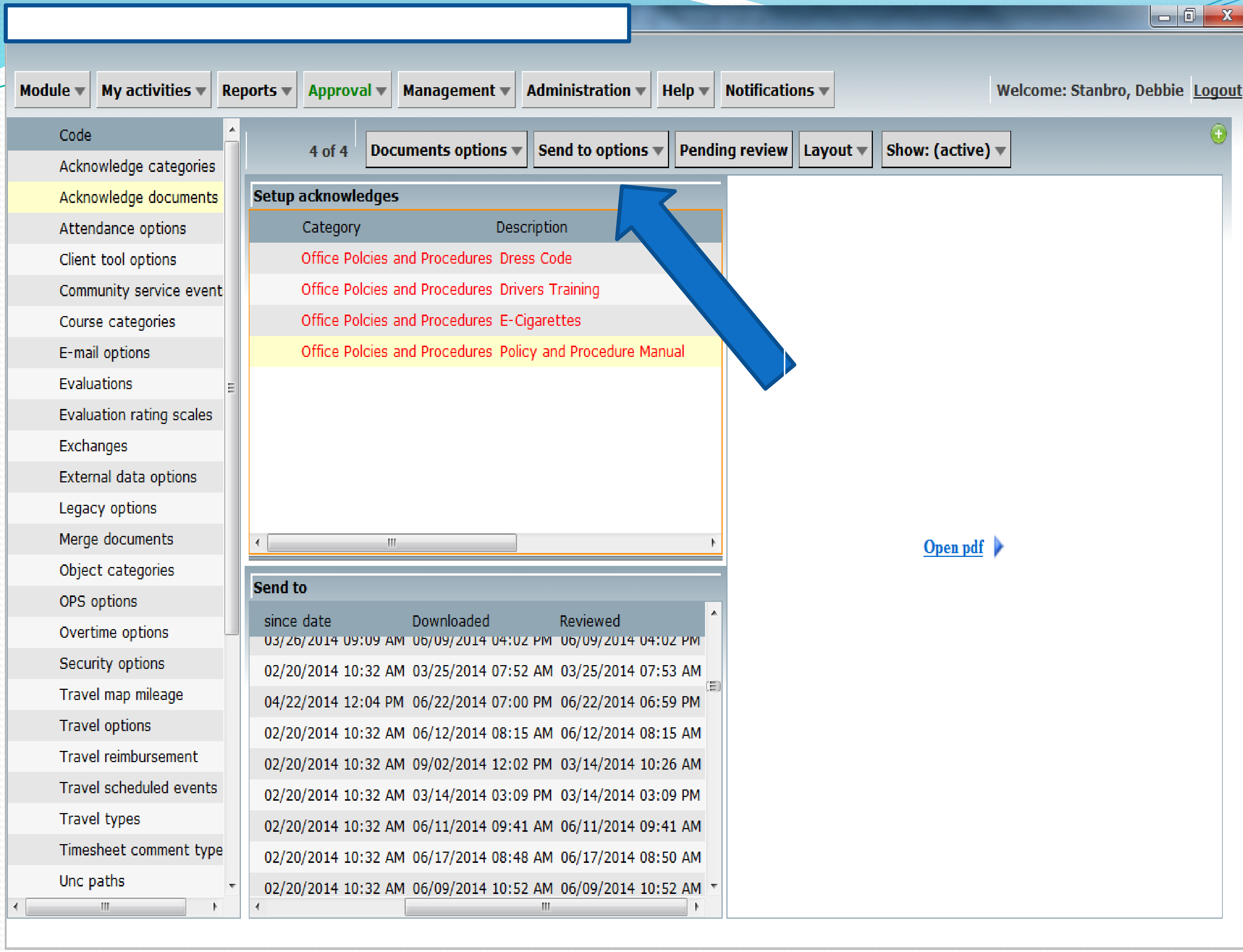


System then asks you where the file is that you want to upload.



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.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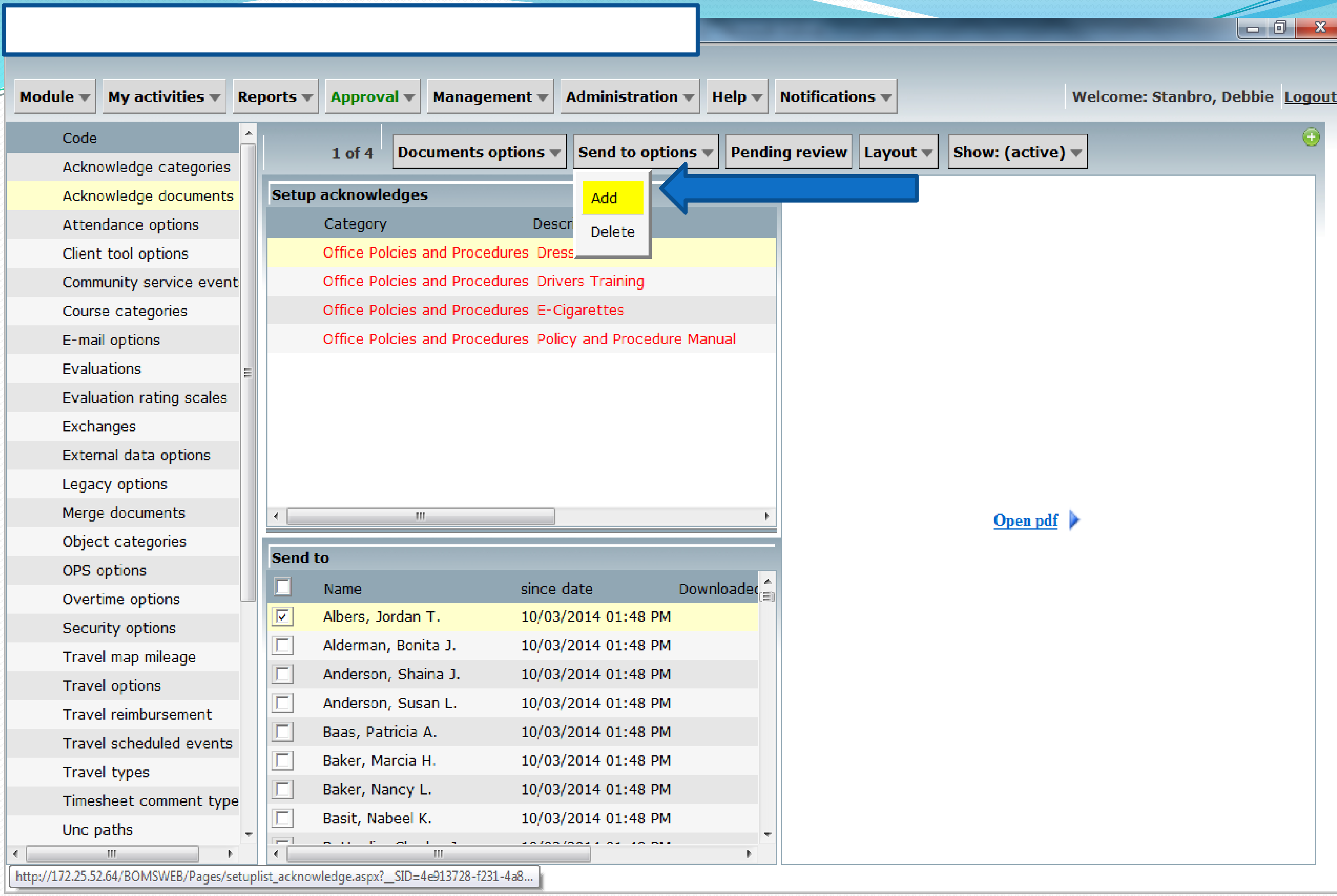

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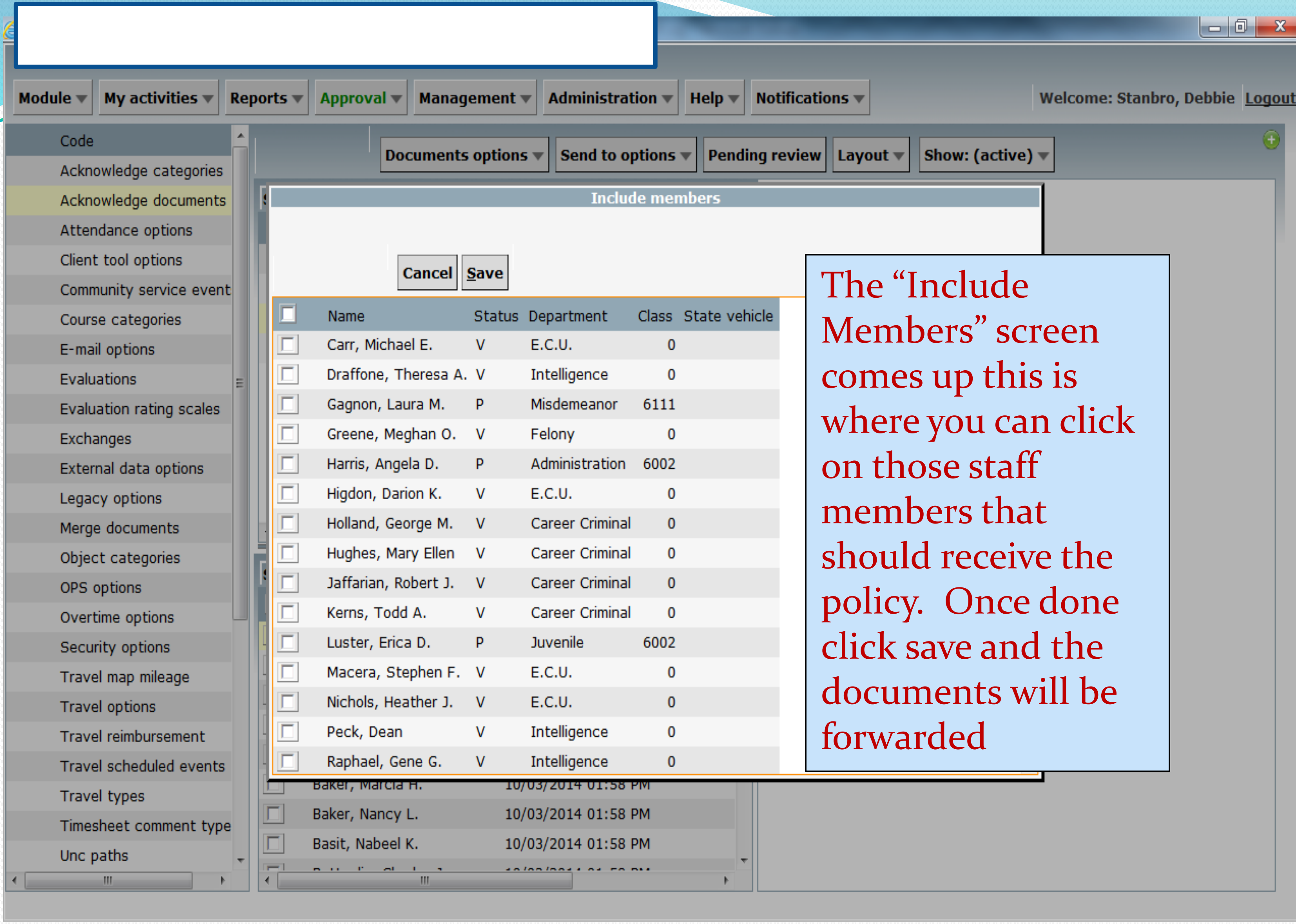
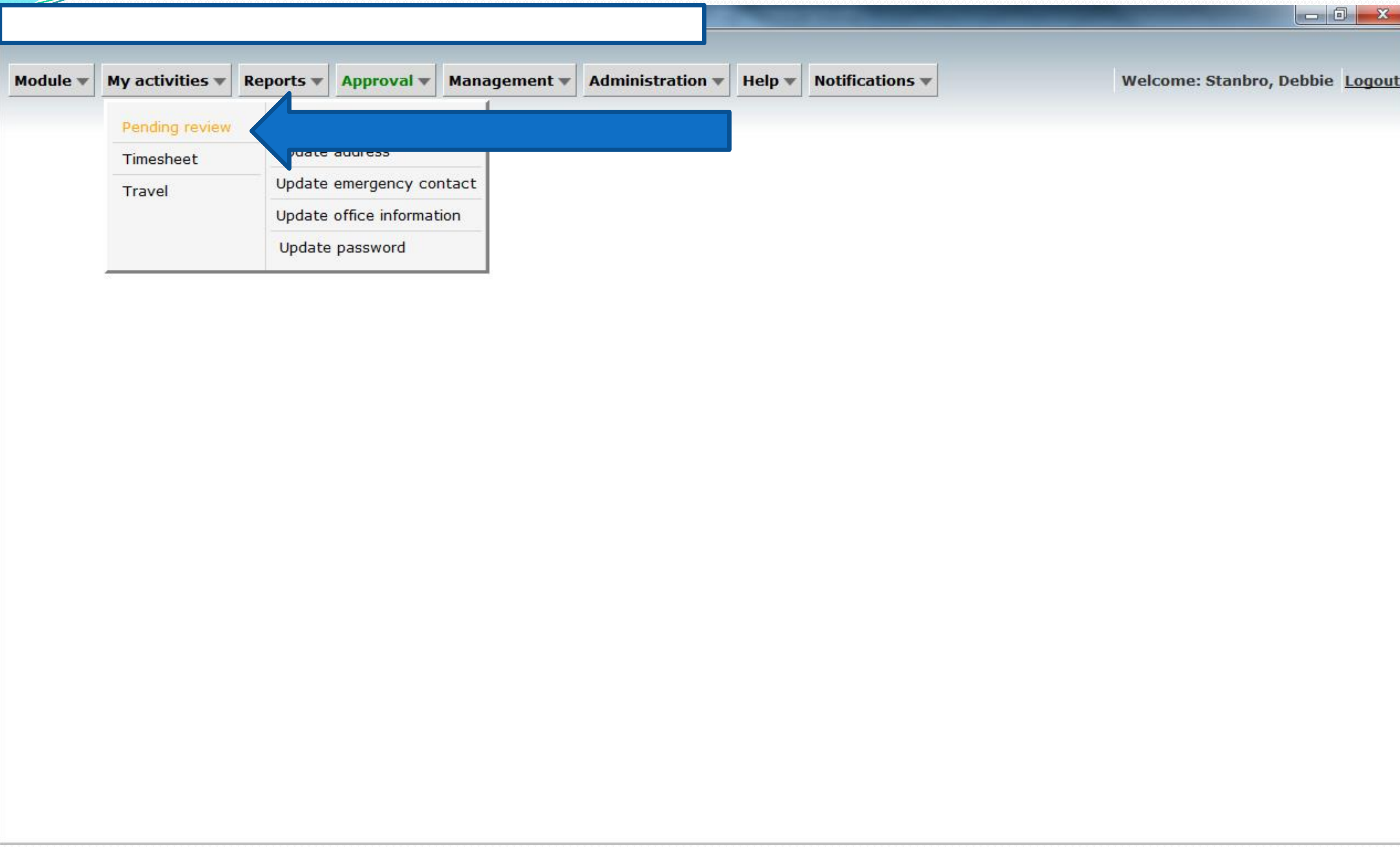
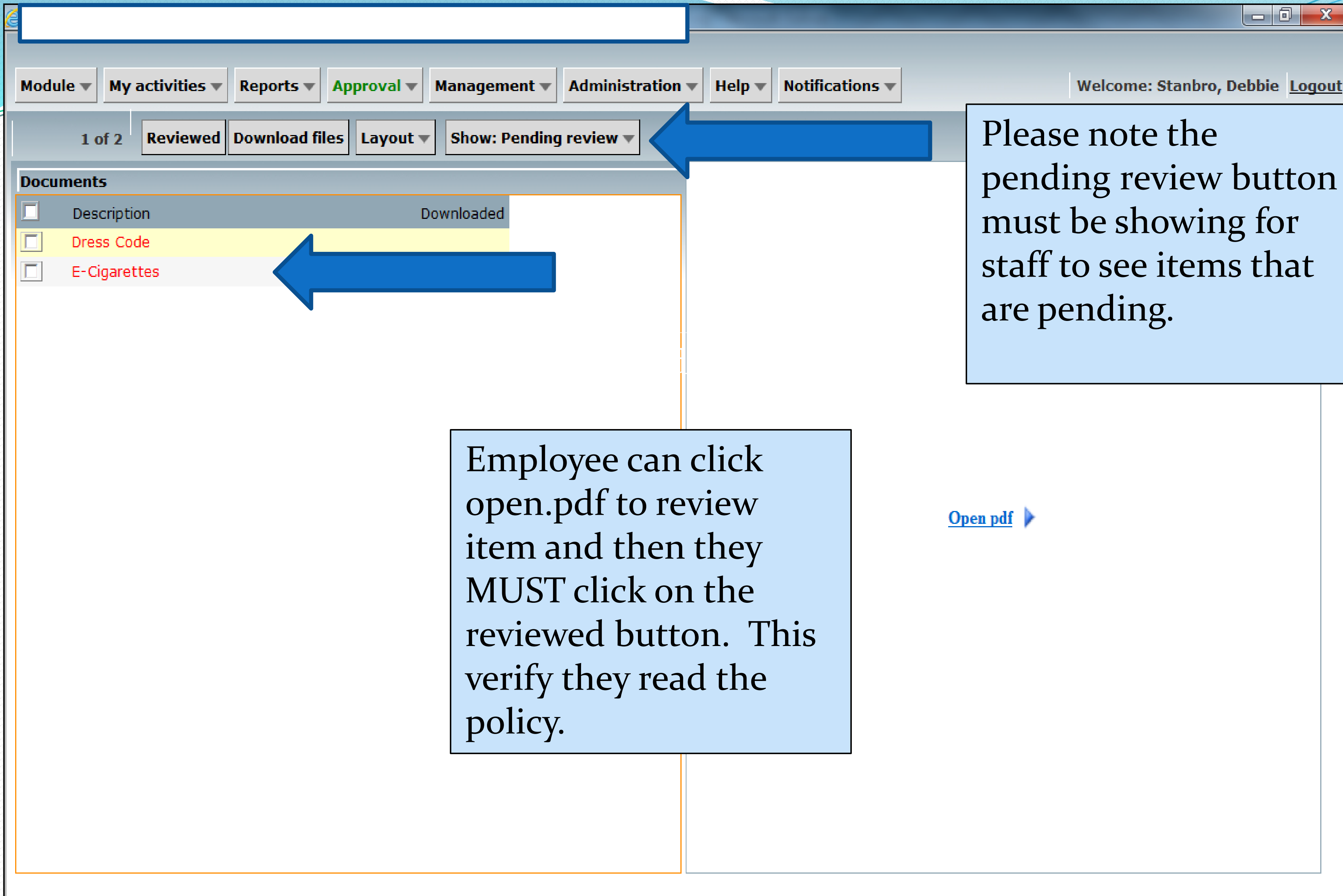


The "Include Members" screen comes up this is where you can click on those staff members that should receive the policy. Once done click save and the documents will be forwarded

What Does Employee See

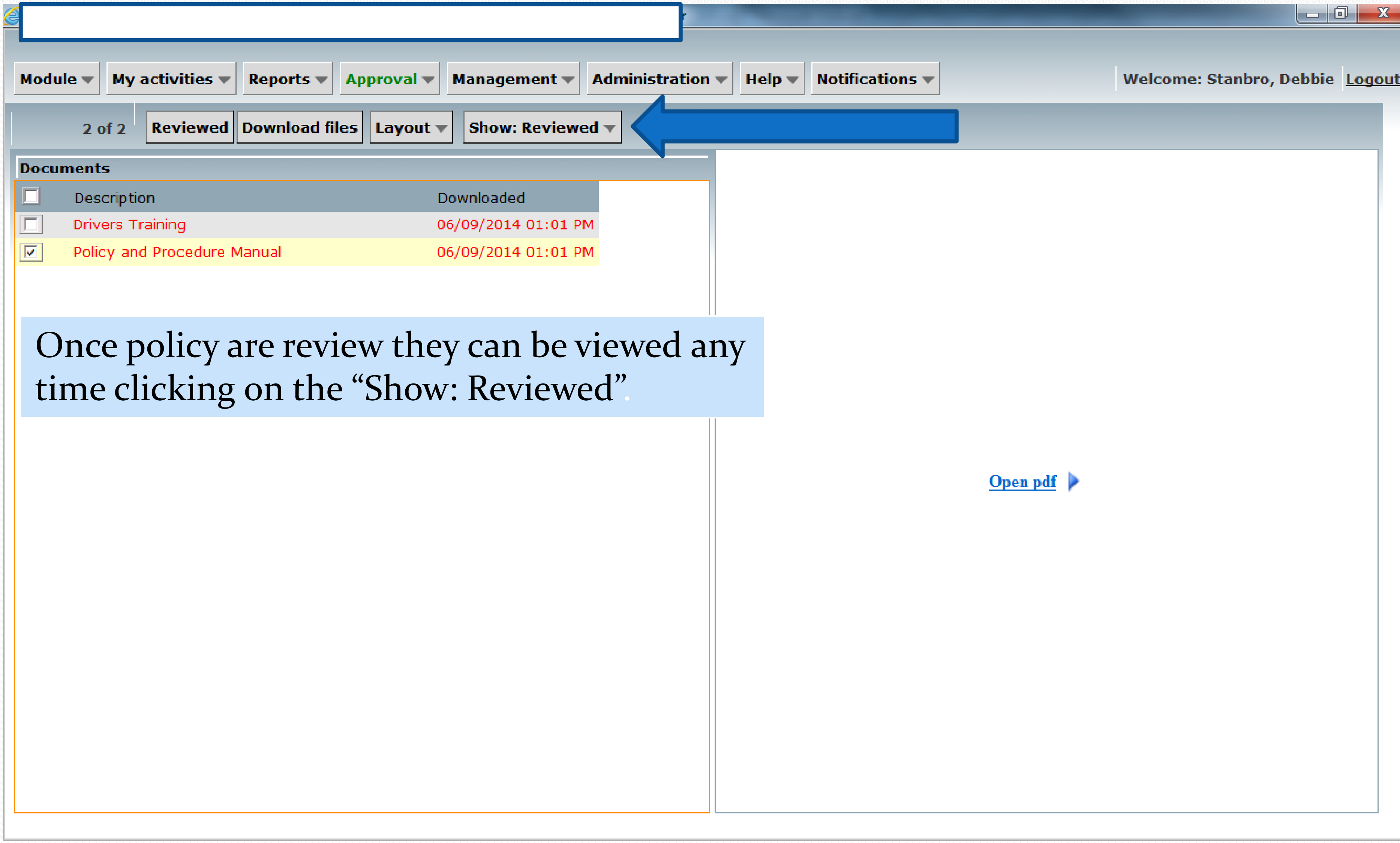




Please note the pending review button must be showing for staff to see items that are pending.

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)

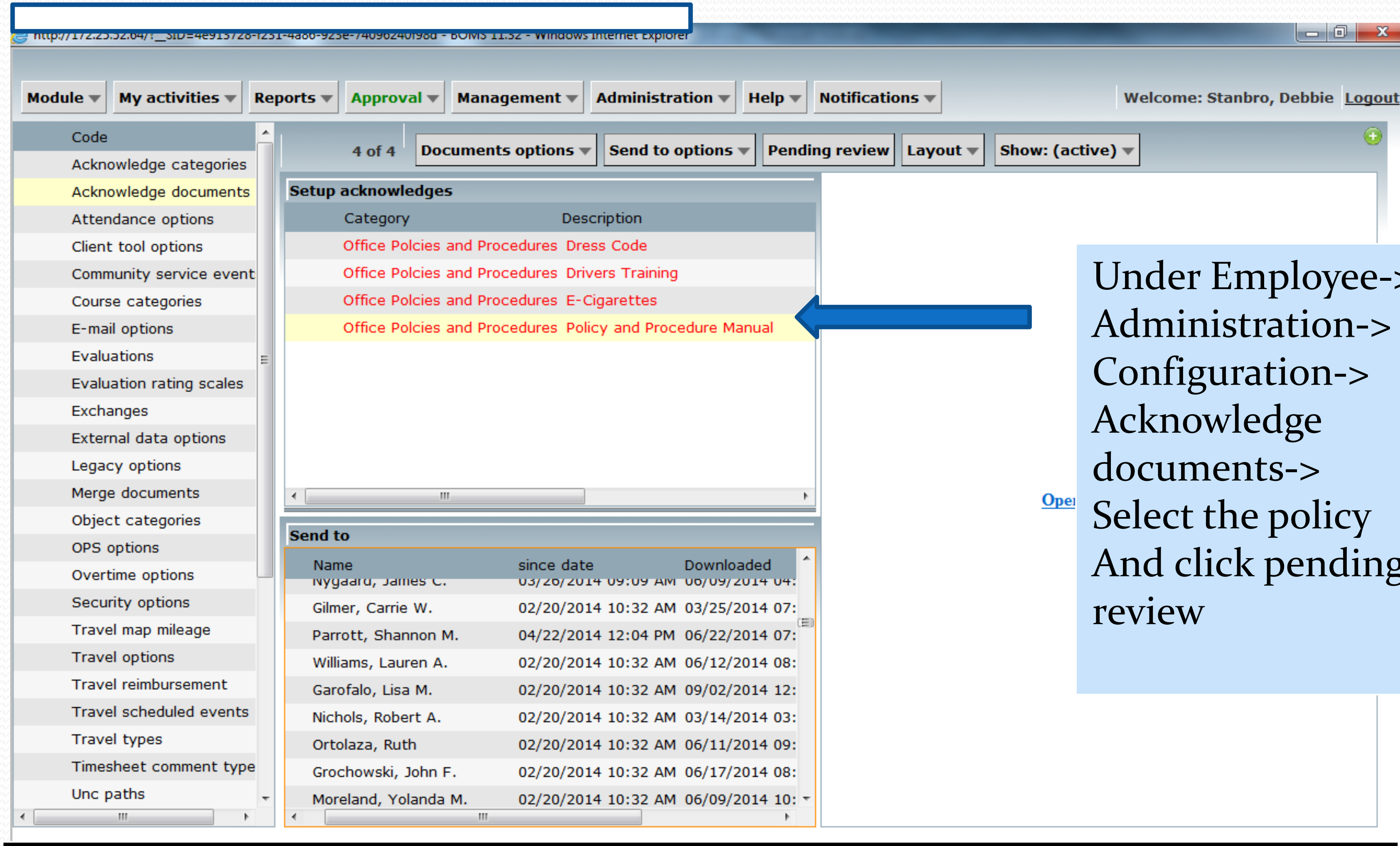


Once policy are review they can be viewed any time clicking on the “Show: Reviewed”.

Reporting Functions

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

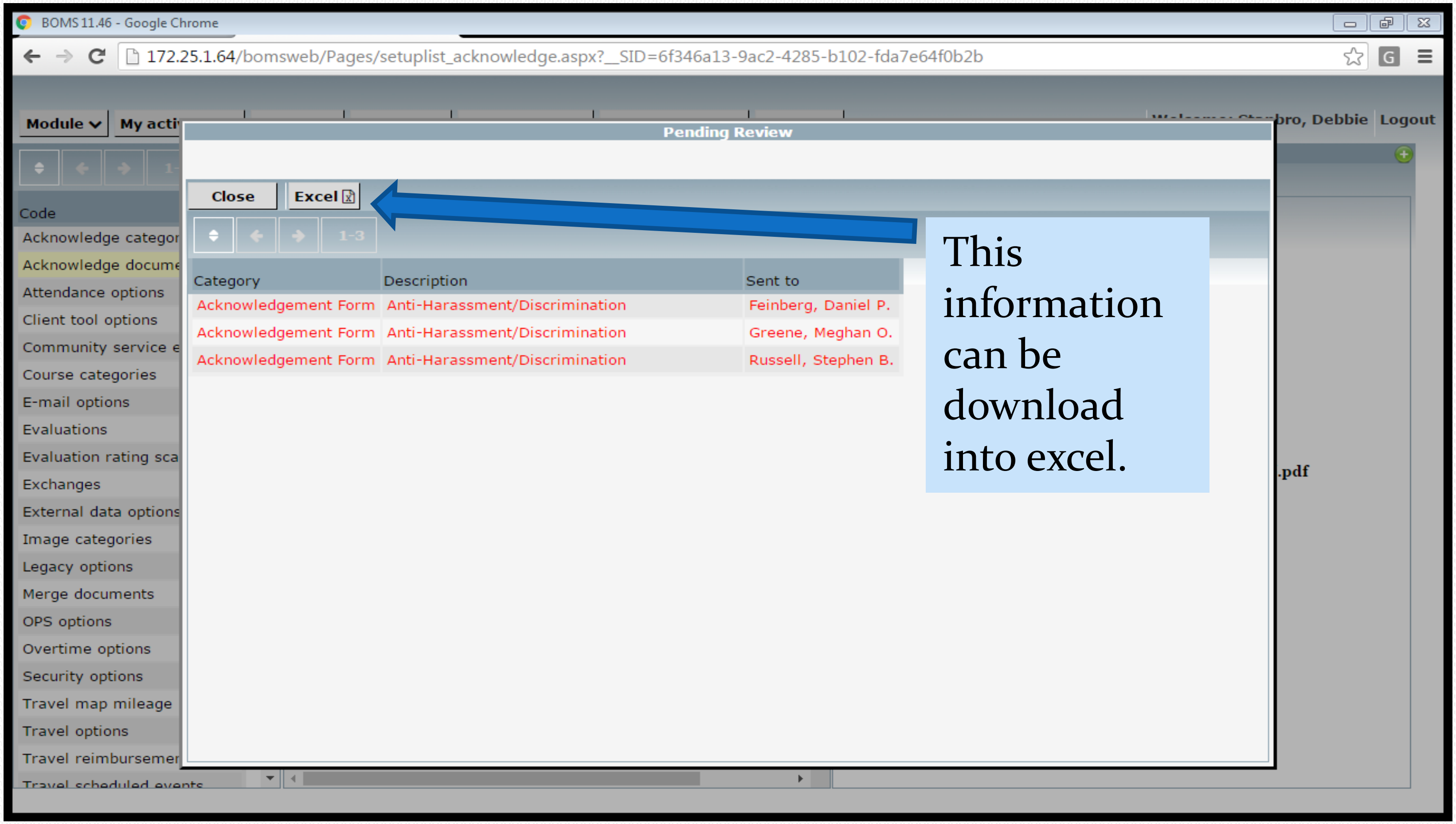
On Screen Verification showing who has not review policy



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

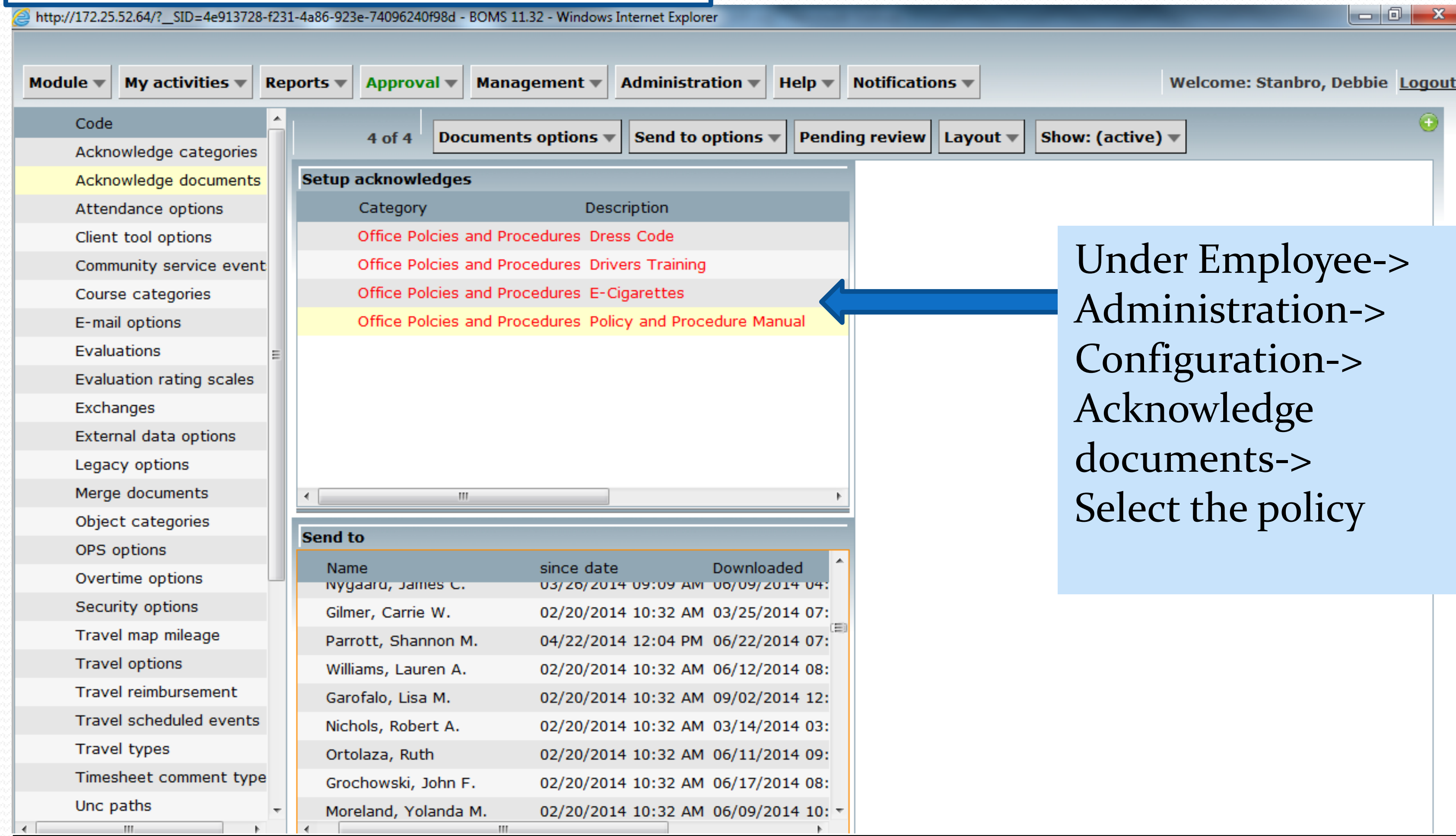
Highlight the policy you want to review, then the “pending review” will show those people who have not reviewed policy.

Shows staff that didn’t review



This information can be download into excel.

On Screen Verification



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