Hello everyone and welcome to Site Admin 201: Policy Management

Today we're going to focus on actions Site Administrators can take to override and/or manage policies outside the standard procedure that require a policy to proceed through an Approval Workflow.

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To kick things off, this is a standard Approval Workflow process for a policy. The policy starts as a draft, pends for approval through the Workflow, and once it completes the Workflow, it becomes active and visible to all users.

There may be some circumstances where you'll need to make modifications but do not need the policy to proceed through the full Workflow.

For example, minor changes like typos, punctuation errors, updates to medication names or procedures, and so on. If a Workflow or any other properties were chosen incorrectly, they can be modified with an override.

Circumstances may arise where an Approver or Approvers need to be added to a Workflow for a single policy. The Approver may be a subject matter expert in the content and their approval carries additional weight.

Approvers can be added one at a time, to simulate a Workflow. We'll talk more about how that looks and works in a few moments.

Let's jump to an existing policy to review how a Site Administrator completes an **override.**

This policy is currently in the active view, meaning it has completed the assigned Workflow. On the blue bar, in the top right, click the option to override. This, again, is only visible for Site Administrators.

Please note this view does not contain the ability to save as a draft. Override changes must be made within this view, and cannot be saved and revisited later. Also, note that there is no AutoSave function and saving requires clicking the Override This Policy button when changes are completed.

We'll locate and correct some small spelling errors.

Once the corrections are made, scroll to the bottom, provide a summary of the changes, and click **Override this Policy**.

The override is complete. The changes are noted in the history, but does not require revisiting the workflow.

As mentioned previously, Site Administrators can also use an override to add additional Approvers into a Workflow. This applies when users, for example, subject matter experts, need to have their approval listed for a single policy, but do not need to be added to the main Approval Workflow.

We'll move to a policy to override and select the **Approval Simulation** tab. This tab is only present during an Override. Add Approvers one by one, and include the date they provided their approval, and then complete the override.

It is important to note this process works for only one Approver at a time. If multiple one time approvers are required, repeat the process for each Approver.

This does not advance the Workflow, so if additional Approvers remain in the Workflow, you can either notify them to Approve, or using our Proxy feature, mark approval on their behalf.

So that covers the single policy administrative override, but PolicyStat also features the ability to conduct Bulk Admin Overrides to multiple policies at the same time.

On the Admin page, click and open the Bulk Admin Override tool. It's worth noting that, the single policy override allows you to make modifications to any aspect of a single policy including the content. The Bulk Admin Override updates only policy properties and is specific to ONLY Active policies.

Narrow the full list of policies to those in need of modification by searching for key terms, filtering by owner, selecting a specific Area or specific reference tag. For this example, we'll look at policies within the Training Area.

Use the Select All box at the top of the table, or select individual policies through their checkboxes.

Modify the assigned Owner, Area, and/or Approval Workflow. If the Area is being modified, it may be necessary to also modify the Approval Workflow to match, or vice versa.

By default, all policies are visible to all users. If you need to restrict a policy to only display for users with View Restricted or higher-level permissions, select this drop down. Policies may need to be restricted, for example, because they contain sensitive information intended only for select Human Resources personnel.

You can also add Reference Tags in bulk. Tags are terms, numbers, phrase,s or any other representation to categorize and group similar documents for reference through the PolicyStat search tool. Tags can be added to policies in bulk by adding them here.

The final two columns relate to the policy's future expiration and current next review periods.

The Future Expiration column details changes to the expiration period for all future policy versions. Expiration periods are set by default within the Area. If needed, this period can be modified for individual policies.

If the current default expiration period is 365 days, but the policy needs more regular reviews (for example every 90 days), you can modify the number of days for the expiration period for this policy.

The new expiration period is applied the next time the policy completes a review. In other words, this change does not immediately impact the current, Active version, only future versions.

The final "Current Next Review" column modifies the review period for the current, Active version of the policy. Select the expiration date from one of two options. First, you can select a specific date on which the Active version will expire. Click the box to open a calendar pop-up and select a specific year, month, and date.

Alternatively, select a date relative to the last approved date. Using the prior example of 90 day reviews, modify the default expiration period and the policy will be due for review again within the next 90 days. Setting a specific date allows staggering review intervals so smaller groups of policies come due for review at different times, rather than all at once. This can ease some stress in the workload of policy owners.

Before you Apply the override, you'll need to describe the changes in the box. This information is listed in the historical record for each policy in order to keep track of the changes made. With all property modifications made and changes explained, press **Apply Override**.

The next topic is how to handle retired policies.

When a policy completes an Approval Workflow, the current, existing version of the policy is no longer needed. There are three options for what can happen to the existing policies. They can be moved to an archive which happens automatically as a new version of a policy is approved. They are still accessible by users with elevated permissions but otherwise hidden from view. Second, they can be retired, or third, they can be outright deleted.

There are a few differences between retiring and deleting policies.

A policy's Owner, the Area Manager, or a Site Administrator can all retire a policy. If desired, there is a setting to disable the retire option for Owners; under the policy layout page. Area Managers will always retain the ability to retire. Retiring the policy moves it out of the general policy library and it will no longer be accessible to any users except Site Administrators.

Deleting a policy removes it from the system outright so no one, including a Site Administrator will be able to view it any longer.

If desired, Site Administrators have the ability to retire policies in bulk from the Bulk Administrative Override interface. Much like changing the properties, click the Retire button in place of applying an Override.

If a policy was retired on accident, a Site Administrator can restore it to circulation. If a policy was deleted on accident, you will need to contact our PolicyStat support team to have it restored.

So let's look at how Site Administrators can restore a retired policy.

This action takes place on the Admin page under the report header. We will actually pull up the report containing all Retired Policies and locate the policy in question.

The current status of this policy is retired, but as a Site Administrator you have the option to edit. Click Edit and scroll to the bottom and restart the Workflow. The policy, again, pends through the workflow until the Approvers mark their approvals and the status returns to Active. If the policy needs to be restored quickly and does not have time to pend for approval, we recommend using a one-step Workflow titled "Site Admin Only" with yourself as the sole approver. You can then quickly approve the policy and restore it to active status.

Once it is active, you can complete an override to restore the Workflow to the original status.

Finally, we'll look at Reference Tag Management.

As mentioned previously, reference tags are specialized way to categorize and group your policies.

Reference tags can relate to specific internal codes, joint commission standards, or other similar categories to organize policies across Areas. They could group documents by forms, job descriptions, or even as an employee orientation "packet".

Reference tags are assigned within the policy's properties menu on a policy-by-policy basis, but can be edited and managed by Site Administrators on the Admin page by clicking References.

From here you can rename references to correct spelling errors, merge two similar tags, or delete them outright.

That concludes our coverage on policy management.

Please download the handout for this video using the link below, as it has links to articles which review the information discussed here. At any time, you can also click the Help button in the bottom corner of any screen within PolicyStat and search our Learning Center articles directly. If you don’t find what you’re looking for, or need additional assistance, click the Contact Us link to generate a new support ticket for our team.

Thanks for being a PolicyStat Customer and thanks for watching.