

Policy Manager
Introductory Training

TRANSCRIPT



WELCOME

to this Introductory Training for Policy Manager, brought to you by the Office of University Compliance. This training should take about 20 minutes to complete and is divided into 2 sections.

First is an overview of Policy Manager and then we will go through tips and tricks for how to find the documents you need within the system.

All UConn Health Workforce members will have access to Policy Manager, and this training must be completed prior to accessing the Policy Manager system. If you're responsible for your department or unit's policies and have been given advanced permissions in the system, you will be provided with additional training.

Before getting started, would you like to check out some training navigation tips?

[Select] **Yes** or **No**

Yes:

Navigation

Each slide in this training is narrated and you will automatically advance to the next slide once the voiceover ends. The seekbar, located at the bottom of the screen, will be unlocked after you view a slide in its entirety. You can use it to rewind or fast forward through content once it's unlocked. If you wish to revisit a specific slide, use the "back" button on the bottom right of your screen or click on the table of contents on the left to select the slide you want to revisit.

Closed Captions

The training is fully closed captioned. You can click the Closed Caption icon on the bottom of your screen to turn this feature on or off.

Training Resource Webpage

For more guidance and resources, you can visit the Training Resource webpage, linked on the bottom left of your screen throughout the training. The Training Resource webpage offers a transcript of the training, an interactive presentation that allows you to revisit the training content, and some background on the UConn Health policy migration project. It's important that we get your feedback, please complete the training evaluation also linked on the Training Resource webpage.

Technical Assistance

If you encounter any technical difficulties during the training, contact helpdesk@uchc.edu or dial x4400 for IT Support.

No:

You got it - let's get started!

What is Policy Manager?

Policy Manager is a secure, cloud-based policy management system, where all of UConn Health's policies and standards documents are stored and processed for review and approval.

Because Policy Manager is web-based, the software can be accessed online through uconn.ellucid.com. You do not need to download or install anything to your computer. You can also access Policy Manager through the shortcut located in the UConn Health Applications folder on your desktop.

This means that every member of our workforce can access up-to-date UConn Health policies and standards documents in one centralized and convenient location in real time. To access Policy Manager, you will use your UConn Health credentials, which is your UConn Health email and associated password.

Benefits of Policy Manager

There are many benefits to Policy Manager. Because all policy and standards documents are in one location, they are easily accessible to all workforce members at all times. And, with the search feature, you can quickly find the document you're looking for. Furthermore, the features in Policy Manager will assist UConn Health with ensuring that documents are up to date for enhanced compliance with regulatory standards, best practices, and patient safety.

User Roles and Permissions

All UConn Health workforce members will be designated as a "User" within Policy Manager. Department and unit leaders - and their designees - who are responsible for keeping policy documents up to date, for monitoring the approval process, and who are authorized to add new department policies will have added permissions in the system called "Manual Owner permissions."

Introduction to the Homepage and Navigation Menu

Let's log in and take a look at Policy Manager together. This is the home page that you will see when you log into Policy Manager. You'll see the side navigation menu on the left.

Below your name, you'll see the 'Home' link. Select this at any time to return back to the homepage. Below that are the links to "Advanced Search," "Browse Manuals," "Competencies," "Favorites," "Recent Documents," "Subscriptions" and "Reports."

Your navigation menu is determined by your permissions meaning if you have elevated user permissions, there will be more options available to you.

You will only see the next section, 'Policy Management', below if you have been assigned a 'Task' in the system.

At the top right-hand corner of your screen there is a 'Help' button. When you select 'Help', you will see a menu with options. The 'Help Center' is where you can find helpful resources on how to use the system.

If you have questions or need help, you can always reference the Help Center, visit the UConn Health Policy Resource page linked on your screen, or contact the Policy Team at policy@uchc.edu.

Basic Search

Within Policy Manager, documents are organized in groups called "Facilities." There are currently two Facilities in Policy Manager to delineate applicability of policies and documents: UConn Health and OneUConn. Documents that are located within both the UConn Health and OneUConn Facilities are applicable to our UConn Health workforce.

You can search for a policy or standards document in the system by using the search bar located at the top right corner of the screen. Search by typing the name of the policy or document, or by entering a keyword or term that may be within the document itself. Click the magnifying glass icon or press 'enter' on your keyboard to search.

Here's a search tip for you – if you use a part of a word as your search criteria, putting an asterisk sign at the end will pull up any document that has that part of the word within it. For example, if you search "hydro*" it will pull any document that includes hydrolysis, hydrogen, hydroxide, and so-on. If the searched term is misspelled or not complete, the search results will not populate.

You can also search for documents by using the "Advanced Search" link on the left navigation bar.

Regardless of how you search, the system will bring you to this search results page with documents that include the searched terms within a document's title or body, or within the document description, key words, or reference codes.

I am going to demonstrate how to search using the Active Threat Policy. I am going to type "active threat" into the search bar and select search. There are 162 documents that populate in the search results because all of them contain the term "active" and/or "threat" somewhere in the document or document fields. To limit these search results to all documents that contain exactly "active threat" together, add quotation marks before and at the end of the search term. After I added quotations, it limited the search results to 2 documents.

Advanced Search

Another way to narrow down search results is to use the Advanced Search filters at the top of the search results page, where you can filter by criteria such as document classification, manual, or facility.

For example, let's say we were looking for the *Surgical Implants and Explants Policy* document and couldn't remember the exact name. Let's start by searching the term "surgical." You can see that there are 155 results. To filter the results for only documents that contain the term 'surgical' in the document title, go to the "Limit Results by Fields" filter, select "Document Title," and click "Apply." Doing so narrowed down the results from 155 to 20. We can then further filter the results to only show policies that contain the term 'surgical' in the document title by going to "Limit Results by Document Classification," selecting "Policy," and then clicking "Apply." Now we see four results, the first of which is the *Surgical Implants and Explants Policy* we were looking for.

When you look at this search result, you can see what manual the *Surgical Implants and Explants Policy* is housed in and that the document belongs to the UConn Health facility.

Browse Manuals

The other way to find a document in Policy Manager is through the “Browse Manuals” option, linked on the left-side navigation menu.

Although the fastest way to find a document is to use the search function, you can use Browse Manuals to find a document similar to the way you would find a document in a file folder structure on your computer.

Document View Page

When you select a policy, it will bring you to the Document View Page.

In viewing this test document, you can see that the Document View Page will have the title of the document you are viewing in the top blue bar . Also at the top of this page, beneath the document title, you will always see a breadcrumb trail showing the document file path where it is stored in the system with selectable links. Meaning, you can quickly select the facility, manual, or sub-manual if you want to browse through those.

On this document view page, documents will be displayed as a read-only PDF. For users with added permissions, such as Manual Owners, the document can be edited and revised when the document is due for review.

Along the top of the Document View Page, beneath the title and breadcrumb trail, you will see a row of buttons.

There is a “Follow” button, which allows you to subscribe to a document. The system will then send you email alerts anytime a followed document is updated or if a new revision has been released. The documents you subscribe to can be managed through the document’s view page or through “Subscriptions” on the left side navigation menu.

POLICY MANAGER INTRODUCTORY TRAINING

Next is the “Email” button, which allows you to email the document link directly from Policy Manager. For example, if you want to share a document with a colleague, or if you have questions about a policy and want to include it in your email to your supervisor, you would select the “Email” option here and it will open your default email application with a link to this document in the body of your email.

Next is the “Favorite” button. If there’s a document you frequently need to view or access, you can favorite the document to quickly access it in your Favorites without having to search or browse for it every time you need it. Favorited documents can be managed from the Document View Page, as well as the “Favorites” page linked on the left side navigation menu.

On your Favorites page, you can easily search and filter through your favorited documents.

Next is the “Approval Details” button. Click this to view details such as when the document was last approved, who it was approved by, and when the approval expires. As you use the system, if you notice a document has expired, please contact the owner of the manual the document is housed in, in this case the Office of Healthcare Compliance and Privacy, or contact the Policy team at policy@uchc.edu.

Selecting the “Show Details or Hide Details” button will either show or hide the additional document data fields such as keywords, the document description, reference code(s), linked related documents, and/or linked external links. Like the documents themselves, these data fields will be managed by the manual owner.

You will notice there is a button to “Print” the document. It is best practice to view or access documents directly through Policy Manager and not print hard copies of these documents. Viewing documents in Policy Manager is the only way to guarantee the document you are viewing is accurate, up to date, and active. You should not print any documents from Policy Manager, unless a hard copy is absolutely necessary, for example, if a hard copy is requested for legal purposes.

Conclusion

Now you are ready to access and use Policy Manager! Feel free to go to uconn.ellucid.com to start browsing and searching. We also recommend you favorite the website, making it even easier for you to reference. Please remember the Policy Team is here to help – if you have any questions or concerns, please contact us at policy@uchc.edu. For IT support with Policy Manager, please contact the IT service desk at x4400 or servicesdesk@uchc.edu.

Training Attestation

To finalize your participation in this training, please select the checkbox on the bottom of your screen and select the "submit" button to confirm your agreement with the following statement: “By selecting submit, I am acknowledging that I have received the Introductory training to Policy Manager and accompanying resource(s) and understand my responsibility to know and refer back to policies and standards documents in Policy Manager.”