

COMMITTEES

PLEASE NOTE: Committees are reserved for use with Review Sets only. Review Sets are considered a legacy feature, and preferred functionalities for committee reviews can be found with User Groups and our [Collaboration features](#). PolicyStat encourages the use of User Groups for assigning approvals and/or acknowledgments. For more information on how to create User Groups, [see this article](#).

Creating a Committee

1. Locate and click **Create a Committee** under the **Policy Reviews** section on the right of the PolicyStat Home tab.



2. Complete the committee by adding at minimum a **Committee Name** and a **Committee Chair**. Additional **Admins** or **Members** can be added as needed.

A screenshot of the "Create a Committee" form. The form has a title bar "Create a Committee" and a section for "Required Fields". The fields are: "Committee Name" (text input), "Chair" (user selection dropdown), "Admin" (user selection dropdown), and "Members" (set of users selection dropdown). A "Create Committee" button is at the bottom.

3. Click the **Create Committee** button when ready.

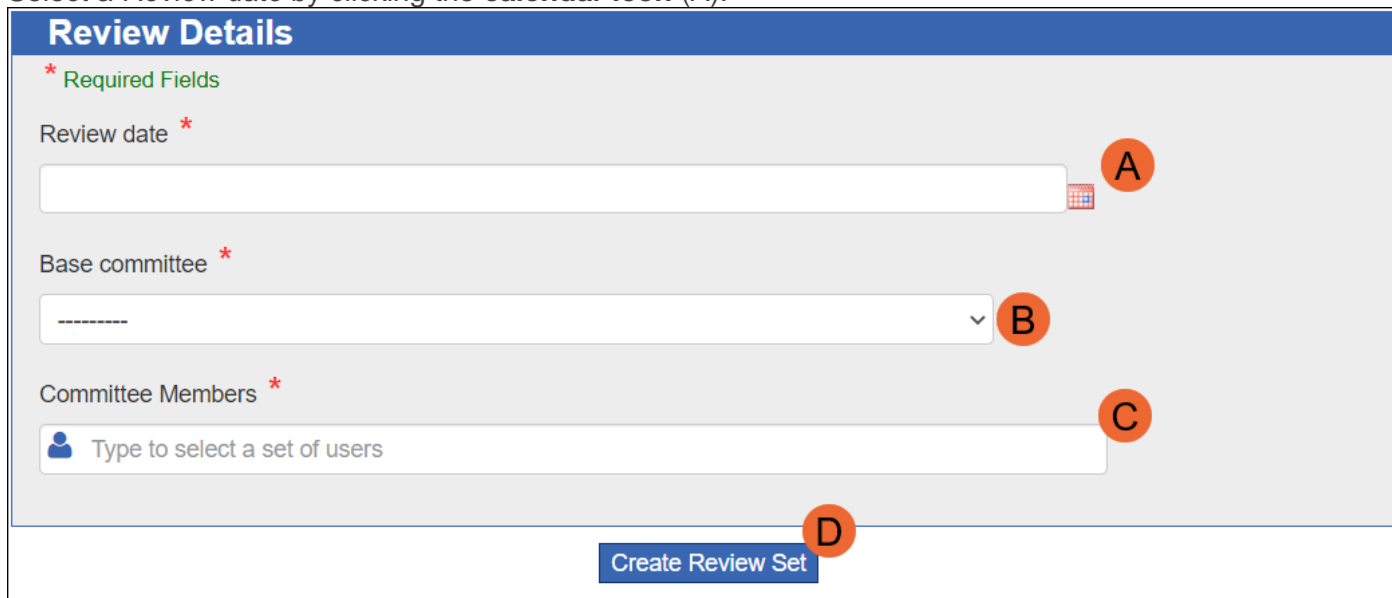
REVIEW SETS

Create a Review Set

1. Locate and click **Create a Review** under the *Policy Reviews* section on the right of the PolicyStat Home tab.



2. Select a *Review date* by clicking the **calendar icon** (A).



A screenshot of the 'Review Details' form. The form has a blue header with the title 'Review Details'. Below the header, there is a section for '* Required Fields'. The form contains three main input fields: 'Review date *' with a calendar icon (A), 'Base committee *' with a dropdown menu (B), and 'Committee Members *' with a search input field (C). At the bottom of the form, there is a blue button labeled 'Create Review Set' (D).

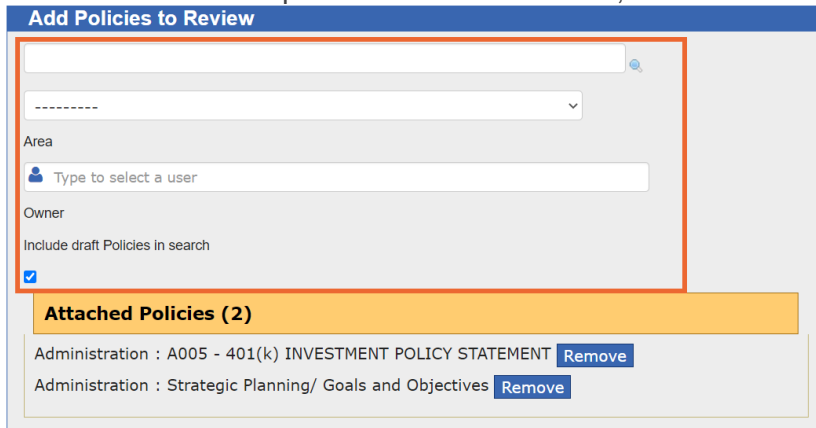
3. Select a *Base committee* using the **dropdown menu** (B).
 - a. If no committee exists, create a committee using the directions on page 1 of this document.
4. Add **committee members** (C) as needed (Optional).
5. With your settings in place, click the **Create Review Set** button (D).

Modify a Review Set

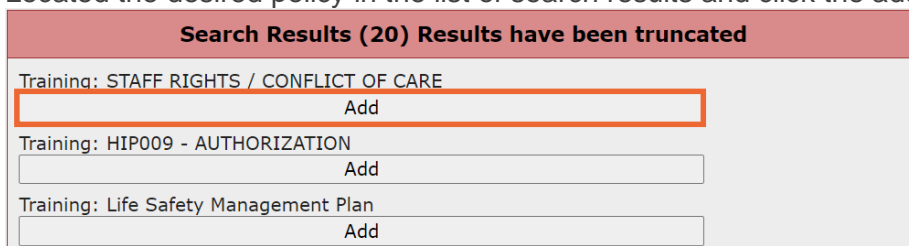
1. Locate and click **Manage Review Sets** under the *Policy Reviews* section on the right of the PolicyStat Home tab.



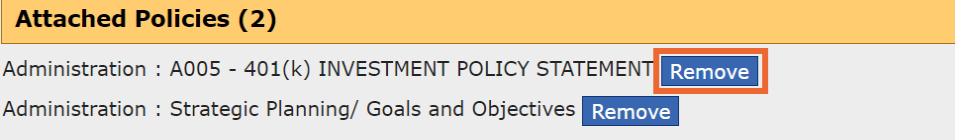
2. Click the **Edit link** besides the corresponding Review Set.
3. To include additional policies in the Review Set, use the filters to narrow the list of polices.



4. Click the magnifying glass icon to apply all filters.
5. Located the desired policy in the list of search results and click the add button to include it in the Review Set.



- To remove attached policies from the Review Set, click the Remove button.

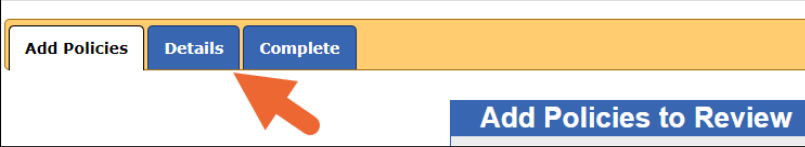


Attached Policies (2)

Administration : A005 - 401(k) INVESTMENT POLICY STATEMENT [Remove](#)

Administration : Strategic Planning/ Goals and Objectives [Remove](#)

- Click the **Details** tab to make adjustments to the Review Set members (Optional).



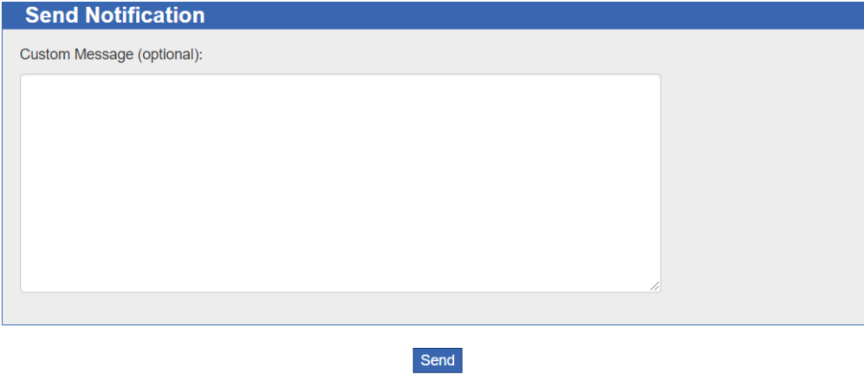
[Add Policies](#) [Details](#) [Complete](#)

[Add Policies to Review](#)

- Adjust the Review Set details, as needed.
- Click the Save Changes button at the bottom of the page.
 - This is only required when changes are made to the Details.
- The committee members associated with the Review set will be notified via a report on their home tab of the outstanding items for review.

Sending Additional Notifications

- Locate and click **Manage Review Sets** under the *Policy Reviews* section on the right of the PolicyStat Home tab.
- Click the **name of a Review Set** to open the Review Set overview page.
- Click the **View/Send Notifications** link in the top blue bar.
- Enter a custom message in the text box (Optional).



Send Notification

Custom Message (optional):

[Send](#)

- Click the Send button to send a notification to the message to the users associated with the Review Set (Optional).
- View all previously sent message(s) in the area below.

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. To open the Review Set, click its **title**.

Review Sets (3)	
Training Committee review	reviewed:0 unreviewed:3
Training Committee review	reviewed:0 unreviewed:5
Training Committee review	reviewed:0 unreviewed:2

2. Within the review set, committee members can review the *due date* for the review set (A), the *documents attached* to the review set (B), and the *status* of the other committee members (C).

Training Committee review

Date: August 23rd, 2018 A

My Status B

My Activity Status For Each Review In This Review Set

Policy	Status
FEEDING DYSPHAGIA PATIENTS	✘
Numbered Headings Example 2	✘
Test Policy	✘
UT 001 (UT-EC.7.10.7) - UTILITY SYSTEMS MANAGEMENT PLAN	✘
Writing Policies Right Draft Policy	✘

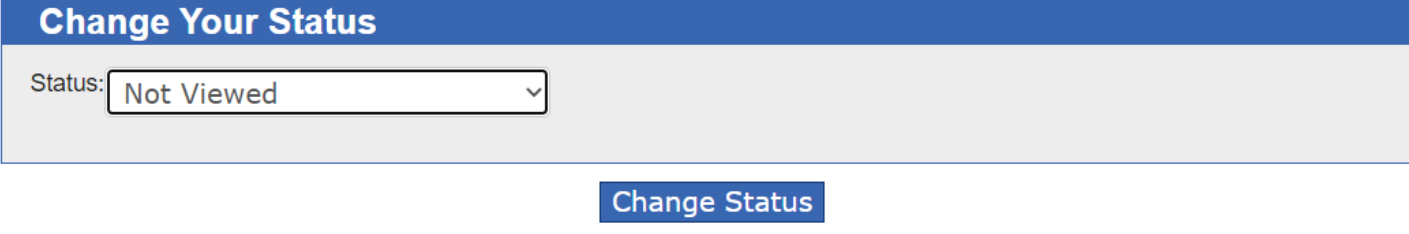
Members' Status C

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

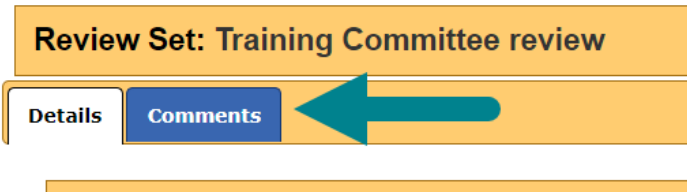
	FEEDING DYSPHAGIA PATIENTS	Numbered Headings Example 2	Test Policy	UT 001 (UT-EC.7.10.7) - UTILITY SYSTEMS MANAGEMENT PLAN	Writing Policies Right Draft Policy
Approver, April	✘	✘	✘	✘	✘

3. Click a policy title to open the document.
4. Scroll down to review the content of the policy.


5. Return to the top after reviewing and use the dropdown to adjust your status.



- a. Options include: Not included in this review, Not viewed, Reviewed with no changes, and Reviewed with changes.
 - b. The Review Set will need to be marked as completed after the members have reviewed all the documents.
6. Click the Comments tab to view any discussion on the policy.



7. Use the *Comment box* to enter a comment of your own (Optional).

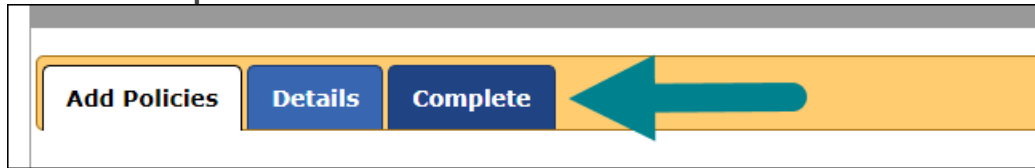


8. Click the **Submit Comment** button to add the comment to the review.

Completing a Review Set

When all members of the committee have reviewed the documents, the Committee Chair or Committee Admin will need to mark the Review as complete.

1. Locate and click **Manage Review Sets** under the *Policy Reviews* section on the right of the PolicyStat Home tab.
2. Click the **name of a Review Set** to open the Review Set overview page.
3. Click **Edit Review Set** in the top blue bar.
4. Click the **Complete** tab.



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

Mark Review Set Complete

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