

Electronic Documentation for Policies and Procedures

Document Management in the Modern Laboratory
Pathology Informatics 2011

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Goal and Objectives

- Define document management
- Understand requirements for document management
- Review process for selection of document management software
- Describe requirements for selection
- Discuss implementation process
- ISO 15189
- Show software



What is Document Management?

- Somewhat confused term currently
 - Many vendors are focused on document scanning software, not “electronic” policy and procedure workflow management
- Generic: a defined process for managing documents related to business processes
- What I will discuss is software for computer based management of laboratory policies and procedures
- Our labs have a huge number of such documents!
 - How about Yours?



Why do you Need Document Management?

- The process of managing documents is daunting and time consuming
 - Clinical laboratories have thousands of policies and procedures
 - Electronic systems provide efficient, effective, cost saving approach
- CAP accreditation requires a document management process/policy to handle laboratory policies and procedures
 - Not yet an electronic requirement
- A key component of ISO 15189 accreditation focuses on highly controlled management of documents



What is Document Management?

Paper

- Procedure and policy binders
- Annual review of policy and procedures
- Complicated process of circulating paper documents
 - Keeping them up to date
 - Documenting review and understanding by staff
- Manual sign off of each policy and procedure
- Access to paper binders across laboratories
- Updates by inserting new document versions to binders
- A policy governing how this will all be managed



What is Document Management? Electronic

- Procedures and policies managed online in “organizers”
- Annual review managed online
- Electronic creation and sign-off
- Updates by electronic versioning
- Simplified process for circulating documents and keeping them up to date
 - Email notification
 - On line quizzes to documenting review and understanding by staff
- Access to online documents for laboratory and non-laboratory personnel
 - PDF's, Word Documents
- Inherent electronic governance, dating and naming enforces document management policies



System Selection



Selection Process

RFI and RFP Process

- Formal RFI and RFP process
 - Used the Internet and personal references to identify 10-15 systems that may be applicable
 - Formed lab working group to indentify requirements
- Submitted RFI (Request for Information) to these vendors
 - Based on responses we identified 4 vendors that were most feasible
- Submitted an RFP (Request for Proposal) based on system selection criteria developed by the working group
- Defined an evaluation form to rate the various proposal
- Carefully reviewed offerings



Selection Process

- Evaluated possible vendors who responded to the RFP
 - Demonstrations
 - Live and web based
 - Product literature and specifications
 - Cost
 - Contract review
 - Ratings and outcomes were reviewed and vetted with the workgroup, laboratory leadership team, and informatics leadership
- This took months!
 - Well worth the effort and wait based on the final selection



Selection Analysis

- Vendor list
- Specification Analysis Excel
- Assessment of Finalists



Vendor list

- Policy Technologies
 - <http://www.policytech.com>
- Policy Medical
 - <http://www.policymedical.com/>
- Zequel, Dynamic Policy 4.0
 - <http://www.zequel.com>
- Soft Tech Health
 - http://www.softtechhealth.com/DM_PolicyMgmtOverview.asp
- EZ Content Manager
 - http://www.acom.com/document_management/index.html?utm_id=1008



Vendor list

- Knowledge tree
 - <http://www.knowledgetree.com>
- Master Control Documents
 - http://www.mastercontrol.com/solutions/document_control_fb.html
- Chem SW
 - <http://www.chemsw.com/12197.htm>
- Innovative Data Solutions (IDS): PowerDMS
 - <http://www.imagineids.com/products/powerDMS.aspx>



Vendor List

- Policy IQ
 - <http://www.policyiq.com>
- Intelex
 - http://www.intelex.com/document_control/index.htm
- Policy Manager
 - <http://www.mcnhealthcare.com/solutions/Policy-Manager-Software.html>

Specification Analysis

Microsoft Excel - PALM_DMS_SPECS.xls [Compatibility Mode]			
	A	B	C
1			Department of Pathology and Laboratory Medicine Henry Ford Health System List of
2			Henry Ford Health System
3			List of Product Specifications for Document Mangement System
4			
5	Number	Section	Query
6	1.0	Technology Platform	
7	1.1		Do you consider your software to be a turnkey solution?
8	1.2		Is the software designed to be deployed at a department level?
9	1.3		Specify hardware, operating system and database requirements
10	1.4		Does the system require a dedicated server?
11	1.5		Specify networking requirements to implement and use your software.
12	1.6		What database management systems are supported?
13	1.7		Client application: thick or thin?
14	1.8		How scalable is your system?
15	1.9		What routine maintenance is required?
16	1.10		Is there an archiving application built into the software?
17	1.11		Does archiving happen in real-time or does the system need to be offline?
18	1.12		Do you provide toll-free technical support within the USA?
19	1.13		What is the current version of the software?
20	1.14		Are new versions currently under development?
21	1.15		When upgrades occur, will existing documents and security parameters be automatically
22			
23	2.0	Security	
24	2.1		Is Active Directory supported for security
25	2.2		Is your system Novell™ compatible?
26	2.3		Can specific activities be assigned and audited?
27	2.4		Does the software allow for multiple facilities/ locations with similar divisions?
28	2.5		Can user data be imported directly from third party products like Peoplesoft™, Novell™ and Active Directory™?
29	2.6		Can user information/permissions be easily modified?
30	2.7		How is security applied to individual users and groups?
31			

Specification Analysis

	A	B	C
32	3.0	Administrative	
33	3.1		Does the software support assessment of target audience on the content - current and updates? (Quizzing)
34	3.2		Does the system support automated notification for document updates at pre-defined or user-defined periods?
35	3.3		Is there an online help system (within the application)?
36	3.4		Has your application been used in a diagnostic medical laboratory?
37	3.5		What specific feature(s) would be to particular advantage in the diagnostic medical laboratory setting?
38			
39	4.0	Documentation Features	
40	4.1		Can pre-existing documents be imported en-masse or individually from another source?
41	4.2		Does your system support MS Word TM as the word processing software?
42	4.3		If not, what is the text editor used by your system? (Eg. Word Perfect TM or Native Editors)
43	4.4		Can it support incorporation of tables, flowcharts, images? (eg. Visio charts)
44	4.5		Can document templates be employed?
45	4.6		Can documents be scanned inot the system?
46	4.7		Can a date/time stamp be put on a document?
47	4.8		Is key wording or tagging supported?
48	4.9		Is electronic searching supported?
49	4.10		Is hyperlinking supported - intradocument, interdocument and interdepartment?
50	4.11		Can a single document be created/edited at one location and shared with multiple locations? How would review and approval process work for these documents?
51	4.12		Does your system support E signatures?
52	4.13		Will electronic signatures be permanent linked to and displayed on the documents?
53	4.14		Will electronic signatures follow document through various software upgrades?
54	4.15		Does the system have an automated page numbering faciltiy?
55	4.16		Can an index be created automatically?
56	4.17		Are table of contents be created automatically?
57	4.18		Will the TOC adjust automatically if a section is added/removed?
58	4.19		Can a specific policy, procedure, or entire manual be selected and printed?
59	4.20		Can the document be printed out as an indexed book with a table of contents?
			Can a quiz be generated to test that targeted end-users have reviewed a new policy or

Specification Analysis

The screenshot shows a Microsoft Excel spreadsheet titled "PALM_DMS_SPECS.xls [Compatibility Mode] - Microsoft Excel". The spreadsheet is organized into columns A, B, and C. Column A contains version numbers, Column B contains category names, and Column C contains specific questions. The following table summarizes the data visible in the spreadsheet:

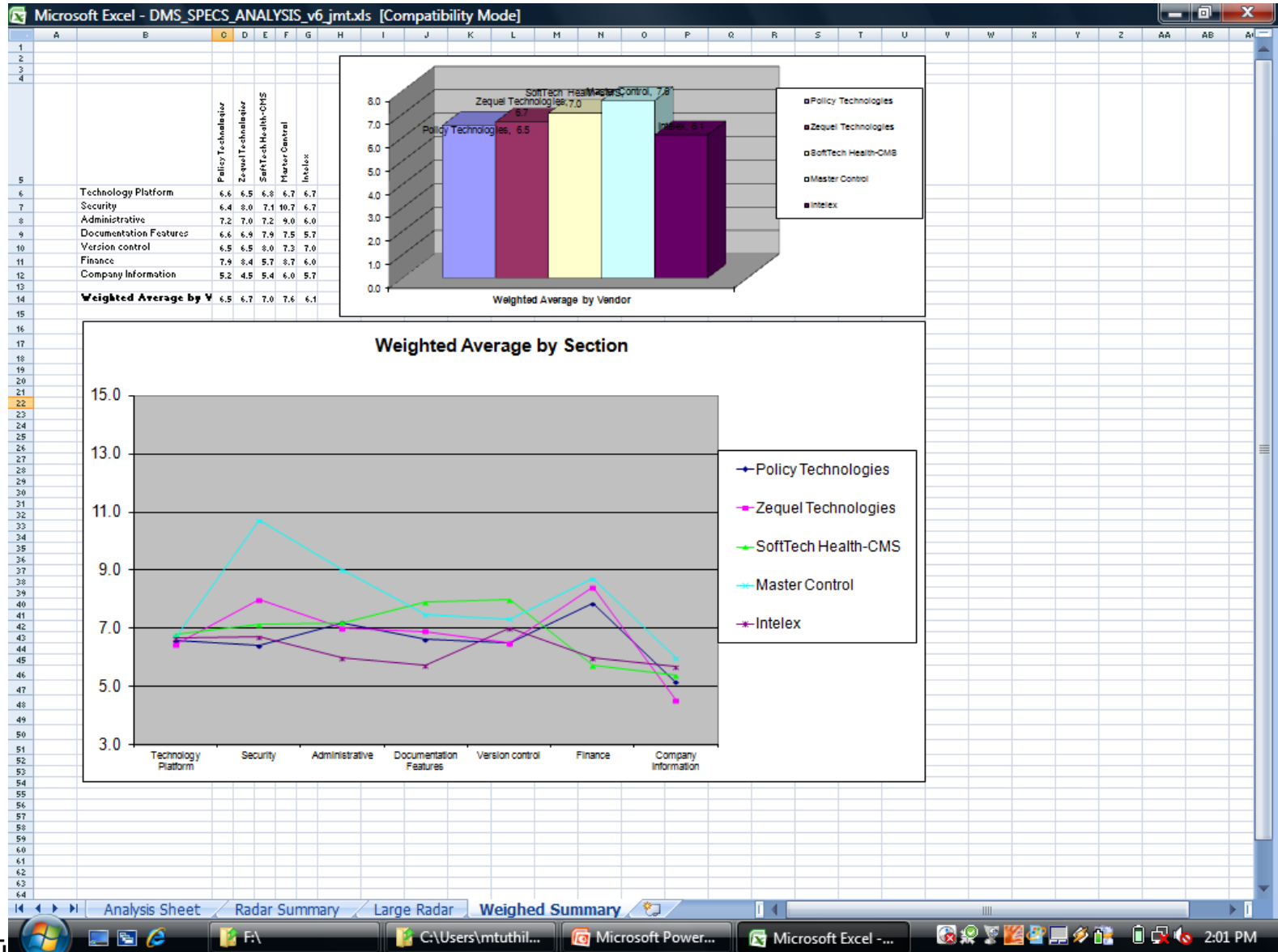
Row	Version	Category	Question
67	5.0	Version control	
68	5.1		What is the system for assigning unique identification name/number for each individual documents?
69	5.2		What is the process for tracking the lifecycle of a document?
70	5.3		Does the system use a document check-in/check-out system?
71	5.4		Can modifications be made to active documents and re-submitted for review?
72	5.5		How are updates to documents tracked?
73	5.6		Is versioning the only way to modify a document?
74			
75	6.0	Finance	
76	6.1		What is the cost of the system?
77	6.2		What is the licensing arrangement?
78	6.3		What are maintenance costs per annum?
79	6.4		Are upgrades included in the system costs?
80	6.5		Is the database included in the cost?
81			
82	7.0	Company Information	
83	7.1		What is the age of your company?
84	7.2		Provide a minimum of five(5) customer references; name, address, phone, email?
85	7.3		Provide any references related to healthcare, specifically those related to the diagnostic medical laboratory on a similar scale?
86	7.4		Provide evidence of positive financial performance?
87	7.5		What is the future vision of your company?
88	7.6		What is the future direction of the product we are discussing?
89	7.7		Do you accept enhancement requests from customers?

Specification Analysis

The screenshot shows a Microsoft Excel spreadsheet titled 'PALM_DMS_SPECS.xls [Compatibility Mode]'. The ribbon is set to 'View'. The spreadsheet contains a table with the following data:

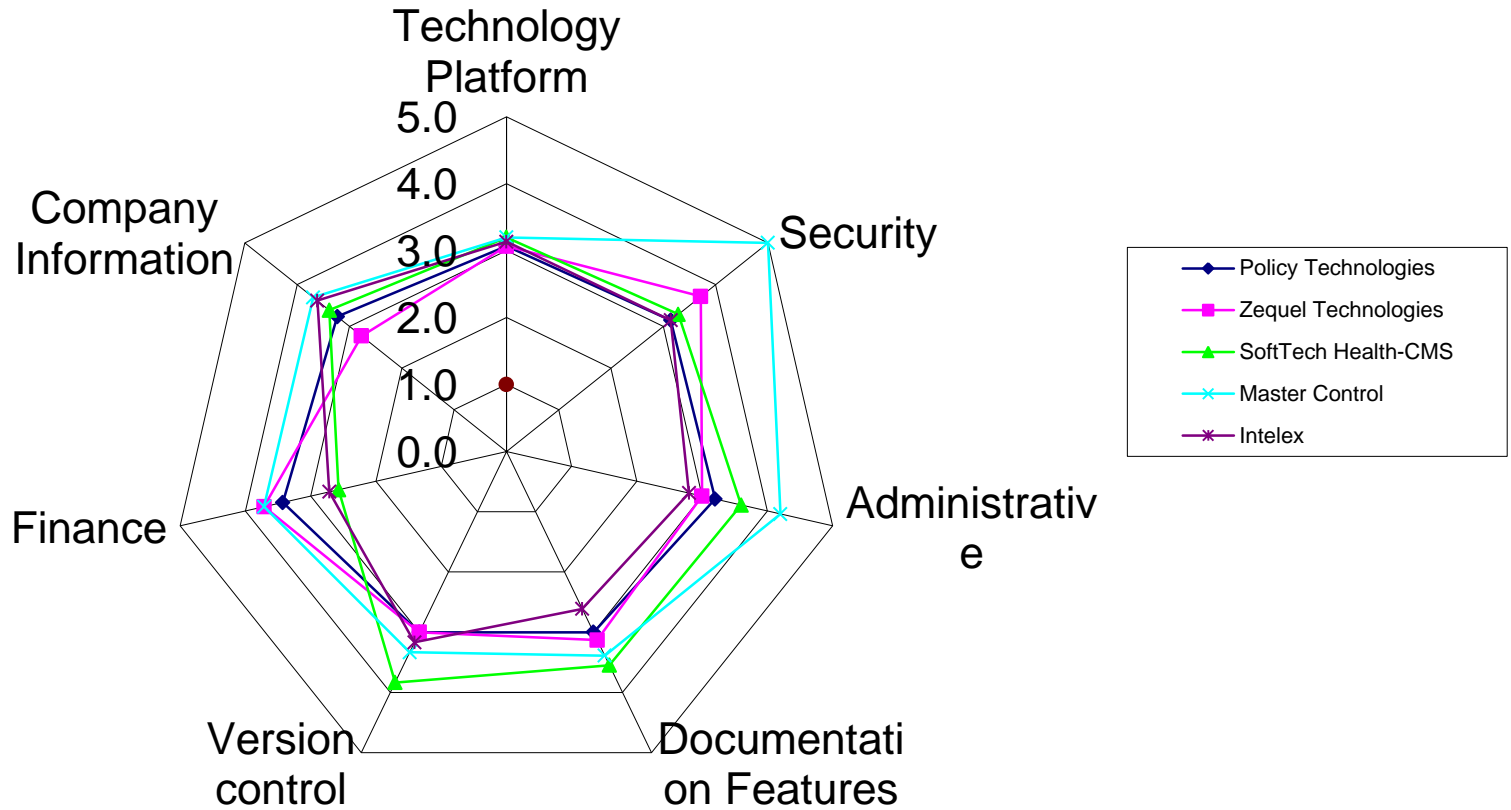
	A	B	C
82	7.0	Company Information	
83	7.1		What is the age of your company?
84	7.2		Provide a minimum of five(5) customer references; name, address, phone, email? Provide any references related to healthcare, specifically those related to the diagnostic medical laboratory on a similar scale?
85	7.3		
86	7.4		Provide evidence of positive financial performance?
87	7.5		What is the future vision of your company?
88	7.6		What is the future direction of the product we are discussing?
89	7.7		Do you accept enhancement requests from customers?
90	7.8		Are enhancements requests seriously considered and implemented in future versions?
91	7.9		Do you monitor regulatory changes from the users standpoint that may effect the performance/usability of your product? If a major regulatory requirement effects the layout, publication and storage of policy's and procedure's does your company alert its customers and provide an immediate upgrade to comply with new requirements, if needed.
92	7.10		
93	7.11		Is your product ISO certified?
94			
95			
96			
97			
98			
99			
100			
101			
102			

Selection of Finalists



Selection of Finalists

Radar Summary





Final Selection

MasterControl Document Management Suite
v. 6.0
Salt Lake City, UT



MasterControl Features

- Suite of applications for laboratory management
- Uses MS Word as text editor and all of Word's features
 - Tightly integrated with MS office application's including PowerPoint, Excel, Visio etc.
- Web based (Thin Client) workflow application manages interaction with documents
- Hardware requirements within our limitations
- Email notification
- Flexible document management process
 - Organizers
 - "Info Cards"
 - Allowed sharing of documents between user groups
 - Flexible workflow



MasterControl Features

- Ease of document import
- External web publication to non lab users
 - Documents can be hyperlinked and provided to non lab users
 - PDF publishing module
- Vendor responsiveness
 - User group
 - Updates/enhancements
 - We have driven several modifications
 - “Binder”
 - Version 8.2 is now implemented



MasterControl Features

- Training Module
 - Verification and documentation of employee review of documents
 - Uses quizzes to assure understanding of document content
 - Meets CAP and ISO 15189 requirements for annual employee review



Implementation



How to Get Started

- Go slow
 - This is a project that runs over years
- Select correct vendor
- Purchase and implement system
- Import current documents
- Design a new template that will address ISO/CAP requirements
 - CLSI standard is a good point of departure
- Examine current file, document nomenclature to assess whether redesign
- Examine inspection cycle relevant to implementation timeline



Technical Requirements

- [Technical requirements link](#)
 - Hardware and software requirements
- Implemented on VM cluster
 - Web server MS Internet Information server
 - Combined with PDF publisher
 - “Polyserve” MS SQL cluster
- Supported on HFHS data center
 - Tape Backup, snapshots, EMC NAS storage



Current Status at Henry Ford

- Most documents have been imported in their original form (over 3000)
 - Some laggards of course!
- Standard template for documents designed and implemented
- A standard nomenclature for document naming and numbering has been designed and implemented
- Imported documents are now being placed into “organizers”
 - This is the first step to activating a division or customer group



Current Status at Henry Ford

- Training for customers has been accomplished with laboratory divisions
 - Now proceeding across other hospital locations
- Documents for each completed organizer are placed on our intranet replacing prior document
- Migrated to enterprise hardware
- Upgraded to version 8.2
- Implemented ISO compliant templates



Current Status at Henry Ford

- Backup systems in place
 - Networked PC in core lab area
- Documents in MasterControl linked to our intranet website
- Controlled copies implemented



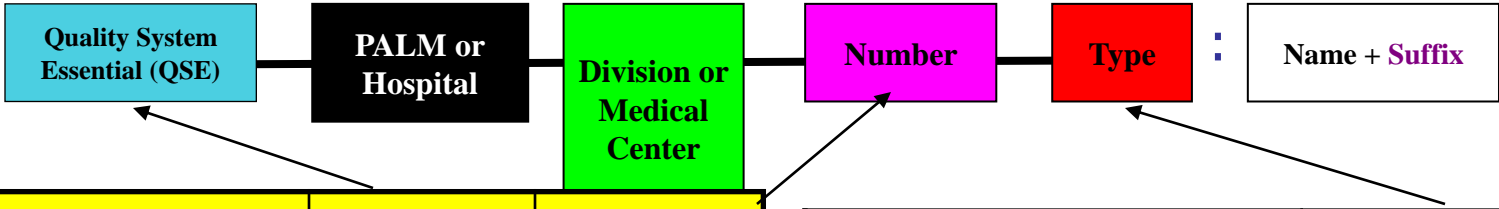
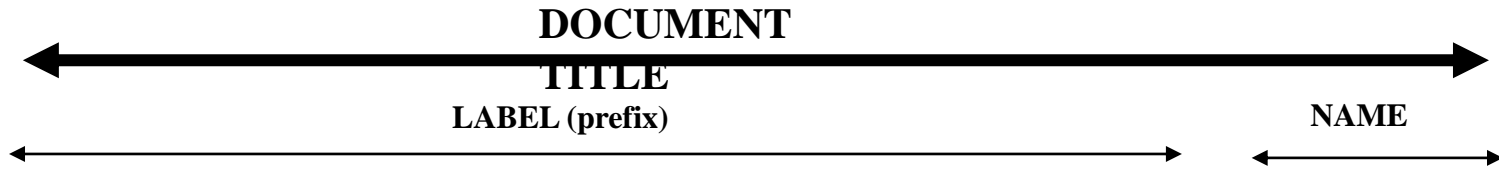
ISO 15189 Document Process

[Link to ISO Naming Conventions](#)
[Template Example](#)

Document Structure: Relationship of Quality Documents

Document Type (Click on individual link to view document template)	Description
<u>Policy</u>	<ul style="list-style-type: none">• Statement of intent• Derived from<ul style="list-style-type: none">- Established requirements, or- organizational mandate• Describes “what is done”
<u>Process</u>	<ul style="list-style-type: none">• Description of “who does what and when”• Provides information on “how it happens here.” Typically a flow chart or table.
<u>Procedure</u> <u>Detailed procedure</u> <u>Policy/procedure combo</u>	<ul style="list-style-type: none">• Instructions for how to do a task within the larger process
Forms/ Records	<ul style="list-style-type: none">• Data, information, or results captured from performing a procedure, recorded on a form, label, or tag, or entered into a computer
<u>Standard Work</u>	<ul style="list-style-type: none">• The current one best way to safely complete an activity with the proper outcome and the highest quality• Each step in the process should be defined and must be performed repeatedly in the same manner identifying work components: Content, Sequence, Timing, Location and Outcome

ISO Document Naming Convention



Quality System Essentials (QSE)	Abbreviation	QSE Number
Organization	ORG	1.0
Personnel	PER	2.0
Equipment	EQM	3.0
Purchasing and Inventory	PUR	4.0
Process Control	PRC	5.0
Documents and Records	DOC	6.0
Information Management	INF	7.0
Occurrence Management	OCC	8.0
Assessments: External And Internal	ASM	9.0
Process Improvement	PRI	10.0
Customer Service	CUS	11.0
Facilities and Safety	SAF	12.0

TYPE OF DOCUMENT	ABBREVIATION
Policy	pol
Process	prs
Procedure	pro
Standard Work	stw
Checklist	chk
Flow chart	flc
Form	frm
Photograph	pho
Power point	ppt
Screen shot	scr
Scanned document	scn
Table	tab
Video	Vid

ABBREVIATIONS IN DOCUMENT CONTROL

Hospital & Division Level Detail

HOSPITAL	DIVISION	ABBREVIATION
PALM = System-wide	PALM	PALM
	Anatomic Pathology	ANP
HFH Henry Ford Hospital	Clinical Pathology	CLP
HFMCT Macomb Clinton	Point of Care Testing	POC
HFMWC Warren Campus	Microbiology	MIC
HFVBH West Bloomfield	Transfusion Medicine	TRM
HFWH Wyandotte Hospital	Chemistry	CHM
HFCH Cottage Hospital	Coagulation	COA
HFMG HF Medical Group	Core Lab	COR
	Cytopathology	CYP
	Hematology	HEM
	Immunology- Transplant	IMM
	Laboratory Service Center	LSC
	Laboratory Support Services	LSS

Title: ALL CAPS (Document Prefix: Document Name + Type of Document)

- I. **Purpose or Principle:**
(Principle: The theory, reasons and background for the policy
Purpose: Description of the reason the policy was created)
- II. **Scope** (Defines the laboratory, division, section or staff members that the policy applies to and will be responsible for the performance and/ or working knowledge of the policy)
- III. **Policy** (Documented statement of overall intent derived from either established requirements or organizational mandate, providing a description of “what is done” and endorsed by management)
- IV. **Materials and Equipment** (Listing of supplies, reagents and equipment necessary to perform this procedure)
A.
- V. **Forms, Labels and Definitions (optional)** (Any associated forms, labels or definitions that are necessary to perform this procedure)
A.
- VI. **Procedure** (Step by step directions for how the procedure is to be performed)
A.

VII. **Monitoring** (This section will describe the processes for ensuring that the associated forms and processes are properly reviewed)

A.

VIII. **References**

- Documents and materials used to create this policy
- List the CAP checklist question that it complies with if applicable- (e.g. LAB GEN .2034)

A.

IX. **Supporting Documents** (Policy, process or the individual procedures that support but are not linked to this policy)

A.

X. **Attachments** (Any other items that are used in the creation of or are otherwise important to the policy/ procedure [that are linked to this policy/ procedure] e.g. Standard Work, Flow chart, Power point, Screen shot, Table or Video)

A.



Demonstration

Screen shots from master control



MasterControl Collaboration Task

Task Name: For Dr. Tuthill's Review

Step Name: Collaboration

Task Instructions: There are no instructions for this item.

Task Contents: [Fake Document #7](#) Doc-007 010

Task Actions:  [Sign Off on this Task](#)

 [Open Collaboration Task in MasterControl](#)

My MasterControl (2)

- My Tasks (2)
- My Links +
- Start Task +
- Tracking
- My Recent +
- My Files +
- My Organizers
- My Training Folder
- My Settings +
- Analytics +

Portal

Documents

Training

MasterControl Portal > My Tasks

Search Print

Pending Tasks

< 1 of 1 > # 30

Click the **Data Entry** or **Approval** icons to complete the current task step.

Type	Task Name ▲	Route Name	Initiator	Received	Due Date	Actions
	For Dr. Tuthill's Review	Fake Document Approval	JRIBEN1	21 Jun 2010		
	Review: 002 1	Document Review	MasterControl	21 Jun 2010	22 Jun 2010	

< 1 of 1 > # 30

Search Print



My MasterControl (2)

- My Tasks (2) +
- My Links +
- Start Task +
- Tracking +
- My Recent +
- My Files +
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	For Dr. Tuthill's Review	Fake Document Approval	JRIBBEN1	21 Jun 2010		
	Review: 002 1	Document Review	MasterControl	21 Jun 2010	22 Jun 2010	

< 1 of 1 > # 30

Search Print

My MasterControl (2)

- My Tasks (2)
- My Links +
- Start Task +
- Tracking
- My Recent +
- My Files +
- My Organizers
- My Training Folder
- My Settings +
- Analytics +

- Portal
- Documents
- Training

MasterControl > Collaboration Workspace

Return
 View File
 Redline File
 Upload Redline
 Sign Off
 Unlock
 Replace File
 Print

Task Collaboration : For Dr. Tuthill's Review (Native Collaboration)

Select the InfoCard and then click View or Redline File.

Due Date	InfoCards										
	<table border="1"> <thead> <tr> <th>InfoCard Number</th> <th>Rev</th> <th>Title</th> <th>Notify When Unlocked</th> <th>Actions</th> </tr> </thead> <tbody> <tr> <td>Doc-007</td> <td>010</td> <td>Fake Document #7</td> <td></td> <td></td> </tr> </tbody> </table>	InfoCard Number	Rev	Title	Notify When Unlocked	Actions	Doc-007	010	Fake Document #7		
InfoCard Number	Rev	Title	Notify When Unlocked	Actions							
Doc-007	010	Fake Document #7									

Members

- Status ▲
- Jackie Ribbentrop (JRIBBEN1)
 - Mark Tuthill (MTUTHIL1)
 - William Kelly (WKELLY1)

Comments

Subject	User	Date	Actions
There are no comments for this step.			

This document is used to test the Master Control system.

9/18/2008

- Testing the one step approval process.
- This is my added content with track changes on. Jackie
- This content is edited with Tuthill's track changes
- What is the next step? Let's check in then accept all the changes in the next round.
- My second round of changes.
- Here are mine as well....can we sign off now?

Next edit

Testing upload

Testing scheduled tasks

Here are the changes I am adding to the document

- One
- Two
- Three
- Four
- five

I

Formatted: Bullets and Numbering



My MasterControl (2)

- My Tasks (2)
- My Links +
- Start Task +
- Tracking
- My Recent +
- My Files +
- My Organizers
- My Training Folder
- My Settings +
- Analytics +

- Portal
- Documents
- Training

Time Zone: Eastern Standard Time

MasterControl > Collaboration Workspace

[Return](#) [View File](#) [Redline File](#) [Upload Redline](#) [Sign Off](#) [Unlock](#) [Replace File](#) [Print](#)

Task Collaboration : For Dr. Tuthill's Review (Native Collaboration)

Select the InfoCard and then click View or Redline File.

Due Date

InfoCards

	InfoCard Number ▾	Rev	Title	Notify When Unlocked	Actions
	Doc-007	010	Fake Document #7	<input type="checkbox"/>	

Members

Status ▲

- Jackie Ribbentrop (JRIBBEN1)
- Mark Tuthill (MTUTHIL1)
- William Kelly (WKELLY1)

Comments

Subject	User	Date ▾	Actions
---------	------	--------	---------

There are no comments for this step.

- My Tasks (2)
- My Links
- Start Task
- Tracking
- My Recent
- My Files
- My Organizers
- My Training Folders
- My Settings
- Analytics
- Portal
- Documents
- Training

Add Collaboration Redline

Add a redline to the collaboration packet.

Use Advanced Redline
or
Select File

Title	Notify When Unlocked	Actions
Fake Document #7	<input type="checkbox"/>	

William Kelly (WKELLY1)	Subject	User	Date	Actions
-------------------------	---------	------	------	---------

There are no comments for this step.

Sign Off on Collaboration: For Dr. Tuthill's Review ✕

Enter your comments (if any) and sign off on the collaboration.

Comments**Sign Off:
Collaboration*****Electronic Signature*****Status**

(Collaboration)

Rev	Title	Notify When Unlocked	Actions
010	Fake Document #7		

User	Date	Actions
------	------	---------



My MasterControl (2)

MasterControl > Collaboration Workspace

- My Tasks (2)
- My Links
- Start Task
- Tracking
- My Recent
- My Files
- My Organizers
- My Training Folder
- My Settings
- Analytics

- Portal
- Documents
- Training

Sign Off on Collaboration: For Dr. Tuthill's Review

Enter your comments (if any) and sign off on the collaboration.

Comments

Jackie this is about done. I red lined and made some changes. Please review.

Sign Off:
Collaboration

***Electronic Signature**

***Status**
Complete

Save

Sign Off | Unlock | Replace File | Print

Rev	Title	Notify When Unlocked	Actions
010	Fake Document #7		

User	Date	Actions
------	------	---------

- My Tasks (2)
- My Links
- Start Task
- Tracking
- My Recent
- My Files
- My Organizers
- My Training Folder
- My Settings
- Analytics
- Portal
- Documents
- Training

Task Details: Review: 002 1

View instructions and contents for the selected task.

Sign Off

Instructions

There are no instructions for this item.

Contents

Document Number	Title	File Name	Actions
002	testing web page review		

< 1 of 1 > # 30

Due Date	Actions
22 Jun 2010	

< 1 of 1 > # 30

- My Tasks (1)
- My Links
- Start Task
- Tracking
- My Recent
- My Files
- My Organizers
- My Training Folder
- My Settings
- Analytics
- Portal
- Documents
- Training

Sign Off Task: Review: 002 1

Enter your comments (if any) and approve the selected task.

Comments





Looks good now.

Sign Off:
Review

*Electronic Signature

*Status
Reviewed

Save

Initiator	Received	Due Date	Actions
MasterControl	21 Jun 2010	22 Jun 2010	   

My MasterControl (0)

My Tasks (0)

My Links +

Start Task +

Tracking

My Recent +

My Files +

My Organizers

My Training Folder

My Settings +

Analytics +

Portal

Documents

Training

MasterControl Portal > Task Tracking

[Return](#) [Print](#)
Tracking Report: For Dr. Tuthill's Review - 21 Jun 2010

The Tracking report lets you see the progress of a packet along its route.

Packet Task Name	Route Name	Current Step	Current Status
For Dr. Tuthill's Review	Fake Document Approval	1-Collaboration	In Process
Instructions	Contents (1 InfoCard)		

InfoCard Number	Revision	Title ^	File	Actions
Doc-007	010	Fake Document #7	Test Document7.doc	

Report Details

Step Name ^	Step Status	# Approved	Escalate After			
1-Collaboration	In Process					
<u>User</u>	<u>Title</u>	<u>Notified</u>	<u>Completed</u>	<u>Status</u>	<u>Leader?</u>	<u>Comments</u>
Jackie Ribbentrop (JRIBBEN1)		21 Jun 2010, 1:07 PM	n/a	Notified	Modify	n/a
Mark Tuthill (MTUTHIL1)	MD, Division Head Informatics	21 Jun 2010, 1:07 PM	21 Jun 2010, 1:48 PM	✓ Complete	None	
William Kelly (WKELLY1)		21 Jun 2010, 1:07 PM	n/a	Notified	None	n/a
2-Approval	n/a	One	hour(s)			
<u>User</u>	<u>Title</u>	<u>Notified</u>	<u>Completed</u>	<u>Status</u>	<u>Modify Step?</u>	<u>Comments</u>
Jackie Ribbentrop (JRIBBEN1)		n/a	n/a	n/a	None	n/a
Mark Tuthill (MTUTHIL1)		n/a	n/a	n/a	None	n/a
3-Final Approval	n/a	One	hour(s)			
<u>User</u>	<u>Title</u>	<u>Notified</u>	<u>Completed</u>	<u>Status</u>	<u>Modify Step?</u>	<u>Comments</u>
Jackie Ribbentrop (JRIBBEN1)		n/a	n/a	n/a	None	n/a
Mark Tuthill (MTUTHIL1)		n/a	n/a	n/a	None	n/a

My MasterControl (0)

My Tasks (0)

My Links +

Start Task +

Tracking

My Recent +

My Files +

My Organizers

My Training Folder

My Settings +

Analytics +

Portal

Documents

Training

Time Zone: Eastern Standard Time

MasterControl Portal > Task Tracking

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Tracking Report: For Dr. Tuthill's Review - 21 Jun 2010

The Tracking report lets you see the progress of a packet along its route.

Doc-007 - 010 - Fake Document #7

 HFH-CYT-Policies-001 - 3 - Welcome to
Cytopathology

 Doc-001 - 006 - Testing the Master Control
System - A...

 HFH-Molecular-Procedure-033 - 2 - 1p and 19q
loss of heterozygosity ass...

HFH-CYT-Technical-072 - 2 - Anal Swab

 HFH-PIN-Policies-025 - 3 - INF-PALM-PIN-7.51-pol
LABORATORY SYST...

 HFH-PIN-Policies-021 - 2 - PRC-PALM-PIN-5.30-
pol: LABORATORY SYS...

 HFH-PIN-Policies-020 - 2 - PRC-PALM-PIN-
5.20.pol: LABORATORY SYS...

 HFH-PIN-Policies-019 - 2 - PRC-PALM-PIN-5.10-
pol: PATHOLOGY INFO...

 HFH-PIN-Policies-017 - 2 - PER-PALM-PIN-2.10-
pol: PI ANALYSTS PR...

 HFH-PIN-Policies-002 - 2 - ASM-PALM-PIN-9.20-
pol: LABORATORY RES...

 HFH-PIN-Policies-004 - 2 - CUS-PALM-PIN-11.10-
pol: PATHOLOGY INF...

 HFH-PIN-Policies-001 - 2 - ASM-PALM-PIN-9.10-
pol: LABORATORY SYS...

 HFH-PIN-Policies-005 - 2 - CUS-PALM-PIN-11.20-
pol: LABORATORY HL...

Doc-002 - 009 - Testing Master Control 2.0

Item Name	Current Step	Current Status
Document Approval	1-Collaboration	In Process

InfoCard Number	Revision	Title	File	Actions
Doc-007	010	Fake Document #7	Test Document7.doc	

	# Approved	Escalate After			
			<u>Notified</u>	<u>Completed</u>	<u>Status</u>
			21 Jun 2010, 1:07 PM	n/a	Notified
Head Informatics			21 Jun 2010, 1:07 PM	21 Jun 2010, 1:48 PM	Complete
			21 Jun 2010, 1:07 PM	n/a	Notified
	One	hour(s)			
	<u>Notified</u>	<u>Completed</u>	<u>Status</u>	<u>Modify Step?</u>	<u>Comments</u>
	n/a	n/a	n/a	None	n/a
	n/a	n/a	n/a	None	n/a
	One	hour(s)			
	<u>Notified</u>	<u>Completed</u>	<u>Status</u>	<u>Modify Step?</u>	<u>Comments</u>
	n/a	n/a	n/a	None	n/a
	n/a	n/a	n/a	None	n/a

My MasterControl (1)

- My Tasks (1)
- My Links +
- Start Task +
- Tracking
- My Recent +
- My Files +
- My Organizers
- My Training Folder
- My Settings +
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- Portal
- Documents
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MasterControl Documents > Document InfoCard

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 Version Information 1 of 1

Document Number	Revision	Version	Vault
HFH-PIN-Policies-019	2	1	HFH-Informatics-rel
Title	Notes	Status	
PRC-PALM-PIN-5.10-pol: PATHOLOGY INFORMATICS PROJECT REQUESTS POLICY	Pathology Informatics Policies GEN.43022	HFH-Informatics - Release	
Document InfoCard Type			Policies-HFH divisional

 Other Information Date Information

Author	Owner	Created	Released
Michele A. Westcott (MWESTCO1)	Michele A. Westcott (MWESTCO1)	4 Jan 2010	6 Jan 2010
Previous Number	Change Number	Effective	Expires
		6 Jan 2010	
Next Review			
[Empty Field]			

Main File

File Name	File Size
PRC-PALM-PIN-5.10-pol PATHOLOGY INFORMATICS PROJECT REQUESTS POLICY.doc	182.00 KB

Standards

Standard	Section
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My MasterControl (1)

- My Tasks (1)
- My Links +
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Linked Documents for the current InfoCard.

InfoCard Information << < 1 of 1 > >>

Document Number: HFH-PIN-Policies-019 Revision: 2 Version: 1 Vault: HFH-Informatics-rel

Main File

File Name	File Size	
PRC-PALM-PIN-5.10-pol PATHOLOGY INFORMATICS PROJECT REQUESTS POLICY.doc	182.00 KB	

Attachments

File Name	File Size	Actions
PRC-PALM-PIN-5.10-scn001 Project Requests PI-1031 Scanned Document.pdf	86.98 KB	

Links

Type	InfoCard Number	Revision Number	Title	Actions
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Web Links

Link Title	Link URL
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Org # ORG-003 Rev 1 PALM Policy Manual (NEW)

Org # Org-004 Rev 1 PALM Safety

PALM-Safety

- Safety Sect 13-001 3 Miscellaneous- Laboratory Reagent Water
- Safety Sect 13-002 3 Miscellaneous- Decontamination and Glassware Cleaning
- Safety Sect 13-003 3 Excessive Noise in the Laboratory
- Safety-Sect 10-001 3 Waste Management- Hazardous Waste Minimization
- Safety-Sect 10-002 3 Waste Management- Biohazardous Waste Disposal
- Safety-Sect 1-001 3 Pathology Safety Committee Introduction
- Safety-Sect 11-001 3 AP- Safety Precautions in Autopsy Pathology
- Safety-Sect 11-002 3 AP- Use of Cryostat with Infectious Tissues
- Safety-Sect 11-003 3 AP-Handling Tissue from Patients with Virus Dementia
- Safety-Sect 11-004 3 AP Autopsy Precautions
- Safety-Sect 11-005 3 AP- Precautions for Mortuary Workers
- Safety-Sect 11-006 3 AP-Transmissible Infectious Disease Autopsy Procedures
- Safety-Sect 11-007 3 AP- Reducing Risk of Transmitting M.tuberculosis during Prosection and Handling of Tissue Post Mortem
- Safety-Sect 11-008 3 AP- Radioactive Tissue Precautions
- Safety-Sect 12-001 3 Employee Safety- Care of Injured Personnel
- Safety-Sect 12-002 3 Employee Safety- Emergency Evacuation Plan
- Safety-Sect 12-003 3 Employee Safety- Latex Allergy Guidelines
- Safety-Sect 12-004 2 Ergonomic Health in the Labolatory
- Safety-Sect 12-005 2 Ergonomics Assessment Checklist
- Safety-Sect 2-001 3 Hazard Communication Plan



Questions?
