

Policy Tech Manual

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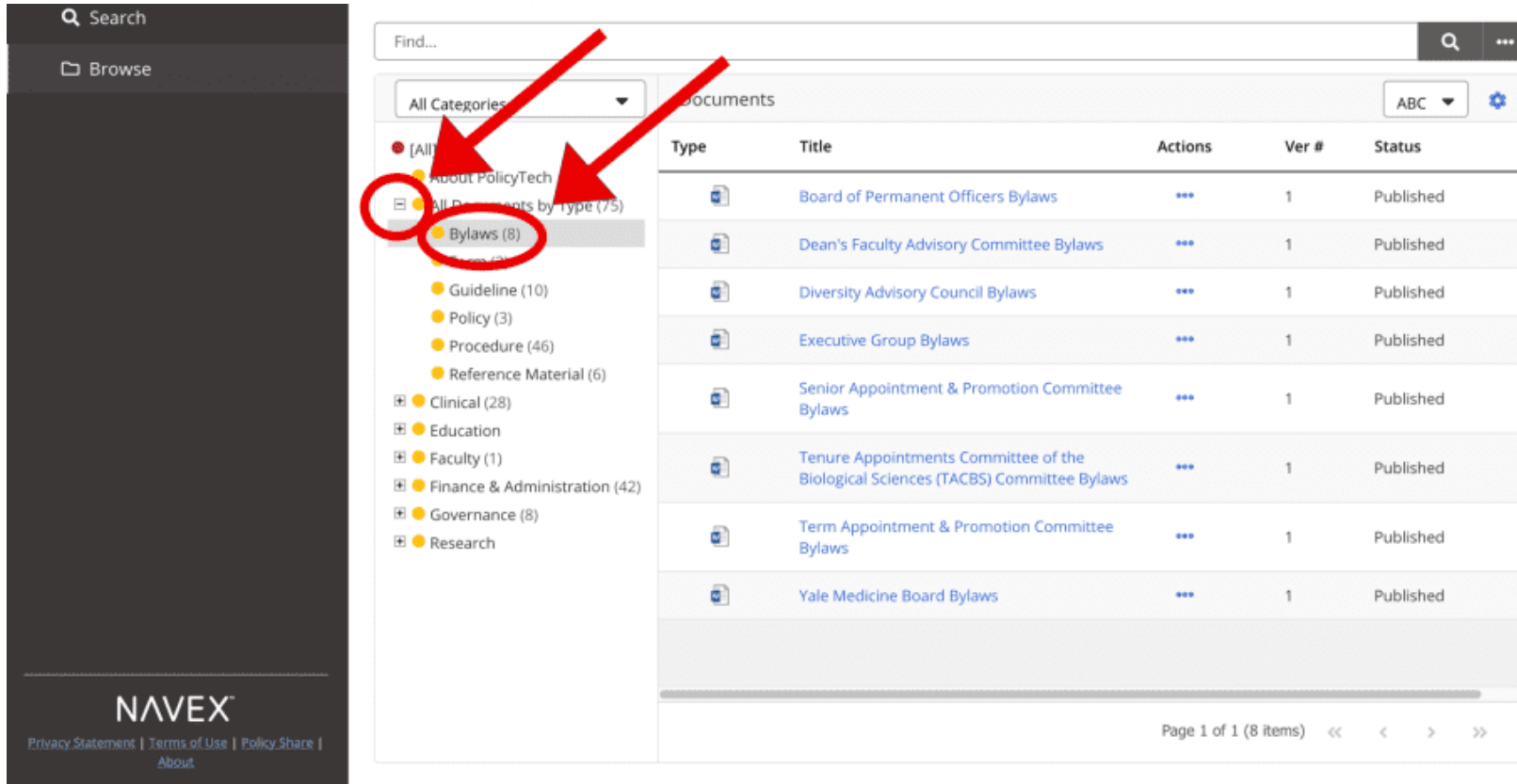
What Does PolicyTech Do?

NUNM uses PolicyTech to automate the handling of policies, procedures, guidelines, forms, and other reference materials. With its rule-based workflows and alerts, PolicyTech ensures that policies progress smoothly through the review process, notifying policy owners about updates or retirements when needed.

A few of the benefits of using PolicyTech:

- **Organization and centralization**
 - PolicyTech organizes documents and related information in a single online searchable database.
 - PolicyTech aids the NUNM public in finding documents through intuitive search functionality.
- **Reduced policy development and review time**
 - Reduces the development and review time by using an automated workflow.
 - Automated emails notify co-workers of a document's status, which keeps projects moving.
- **Easy and automated electronic document history and archiving**
 - When a new document version is created, the software will automatically replace it. Old documents are archived into an online database for safe keeping.
 - Archived versions are easily accessible by system administrators, while employees are only able to access the current versions.
 - The document history is recorded in the solution. Document revisions are stored to provide a clear picture of the document history .

How to Browse



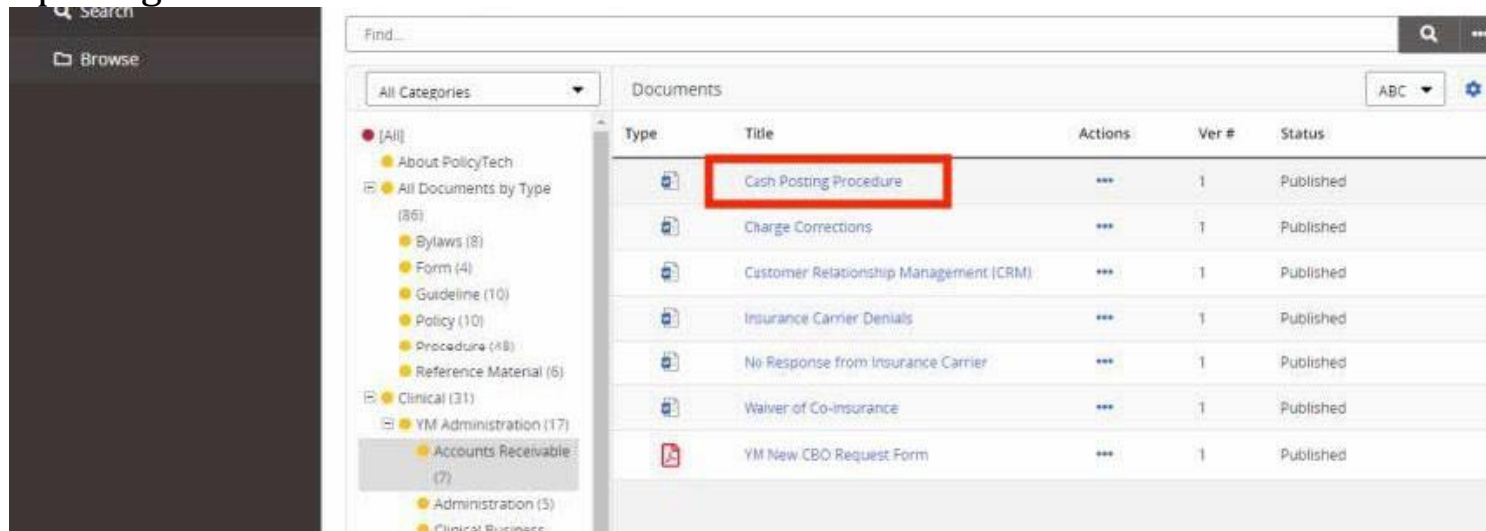
Browse PolicyTech

To browse the documents in PolicyTech, either click a category label (such as “All Documents by Type”) or click the “plus” sign next to the category label.

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1. Clicking the “plus” sign next to the folder title will open the sub-categories of that category.
2. Clicking the category title will list all documents in that category/folder.

Opening a document



To open a document, select the document from the list displayed in the right panel.

To open a document, select the document from the list displayed in the right panel.

The selected document will open in a new tab.

Search for Document Using "Browse" View

The screenshot shows a web interface for searching documents. On the left is a dark sidebar with 'Search' and 'Browse' options. The main area has a search bar containing 'budget' (circled in green with a red '2'). Below the search bar is a category list on the left, with 'Finance & Administration (44)' selected (circled in green with a red '1'). The main content area displays a table of documents with columns for Type, Title, Actions, Ver #, and Stat. A red callout box with a red '4' points to the table, containing the text: 'All of these documents contain the word "budget" and are housed under the Finance & Administration Category.'

Type	Title	Actions	Ver #	Stat
	AAMC Survey Procedure	...	1	Publ
	Academic Leaves of Absence Procedure	...	1	Publ
	Academic Program Support Commitment Procedure	...	1	Publ
	Annual Budget Procedure	...	1	Publ
	Capital Plan Procedure	...	1	Publ
	Costing File Procedure	...	1	Publ
	General Allocation (GA) Procedure	...	1	Publ
	Long Range Plan Procedure	...	1	Publ
	Q2 Forecast Monitoring Procedure	...	1	Publ
	US News and World Report Survey Documentation Procedure	...	1	Publ
	YSM Recommended Program Usage Reference Material	...	1	Publ
	YSM YF22 Year-End Closing Procedures	...	1	Publ

- To search “documents within a specific category”:
 1. Select Category
 2. Enter “keyword” in the “Find search bar.”
 3. Select the magnifying glass in the top right corner.

- All documents that contain that keyword and are within that category will display. If you have a category selected ONLY the documents in that category are searched for by your keyword. The selected category in this case will appear highlighted in the left side navigation.

The screenshot shows a search interface with a search bar at the top containing the text "space". Below the search bar, there is a dropdown menu for "All Categories" which is currently set to "[All]". To the left of the main document list is a sidebar with a list of categories: "About PolicyTech", "All Documents by Type (139)", "Clinical (41)", "Education (35)", "Faculty (1)", "Finance & Administration (42)", "Governance (8)", and "Research". The main area displays a table of documents with columns for Type, Title, Actions, Ver #, Status, and R. The table contains 16 rows of document entries, all with a status of "Published".

Type	Title	Actions	Ver #	Status	R
	AAMC OMS Survey Procedure	...	1	Published	9
	AAMC Survey Procedure	...	1	Published	9
	Academic Program Support Commitment Guidelines	...	1	Published	9
	Capital Plan Procedure	...	1	Published	1
	Coiting File Procedure	...	1	Published	1
	Credentialing Policy	...	1	Published	3
	General Allocation (GA) Procedure	...	1	Published	1
	Procedure for the Nomination and Renewal of Endowed Professorships within Yale School of Medicine	...	1	Published	1
	Process for Space Allocation	...	1	Published	1
	Program and Center Naming Conventions and Guidelines for YSM & YM	...	1	Published	2
	Summary of Staff Expectations: Workplace	...	1	Published	

Page 1 of 1 (16 items)

- To search for a document throughout all PolicyTech documents, choose [ALL] option located at the top of the category list prior to typing in the keyword for your search. This will prompt the system to

search across ALL categories for the relevant document. Then follow the same steps as outlined above (i.e., enter key word into the search bar and select the magnifying glass in top right corner).

How to Search

The screenshot displays the PolicyTech interface with three search methods highlighted by red circles and arrows:

- Search:** Located in the left navigation bar.
- Find...:** Located in the top navigation bar.
- Advanced Search:** Represented by a three-dot menu icon in the top right corner.

The main content area shows a list of documents under the 'Bylaws' category. The table below is a representation of the data shown in the screenshot:

Type	Title	Actions	Ver #	Status
Bylaws	Board of Permanent Officers Bylaws	...	1	Published
Bylaws	Dean's Faculty Advisory Committee Bylaws	...	1	Published
Bylaws	Diversity Advisory Council Bylaws	...	1	Published
Bylaws	Executive Group Bylaws	...	1	Published
Bylaws	Senior Appointment & Promotion Committee Bylaws	...	1	Published
Bylaws	Tenure Appointments Committee of the Biological Sciences (TACBS) Committee Bylaws	...	1	Published
Bylaws	Term Appointment & Promotion Committee Bylaws	...	1	Published
Bylaws	Yale Medicine Board Bylaws	...	1	Published

Three ways to search: Search from the left navigation, from the "Find" bar, or click the "... " to use the advanced search options.

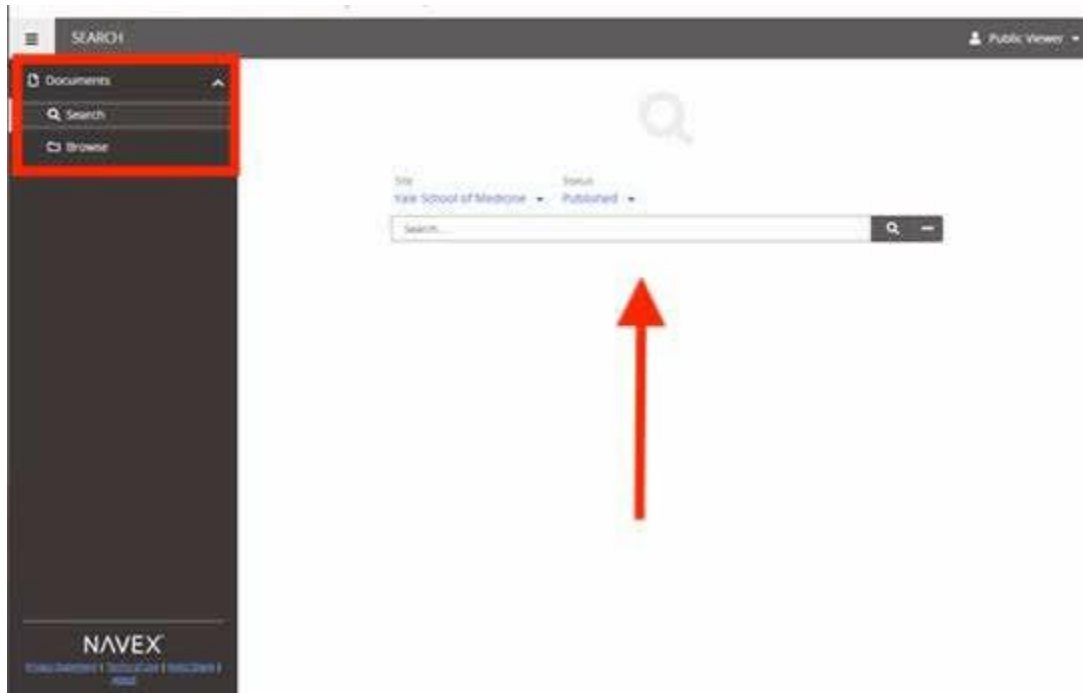
You can reach search options three different ways in PolicyTech:

- **The word: Search**
In the left navigation, select "Search," which opens a keyword search bar.
- **The "Find" bar**
From the "Browse" view, type keywords into the "Find" bar at the top, then hit enter or click the

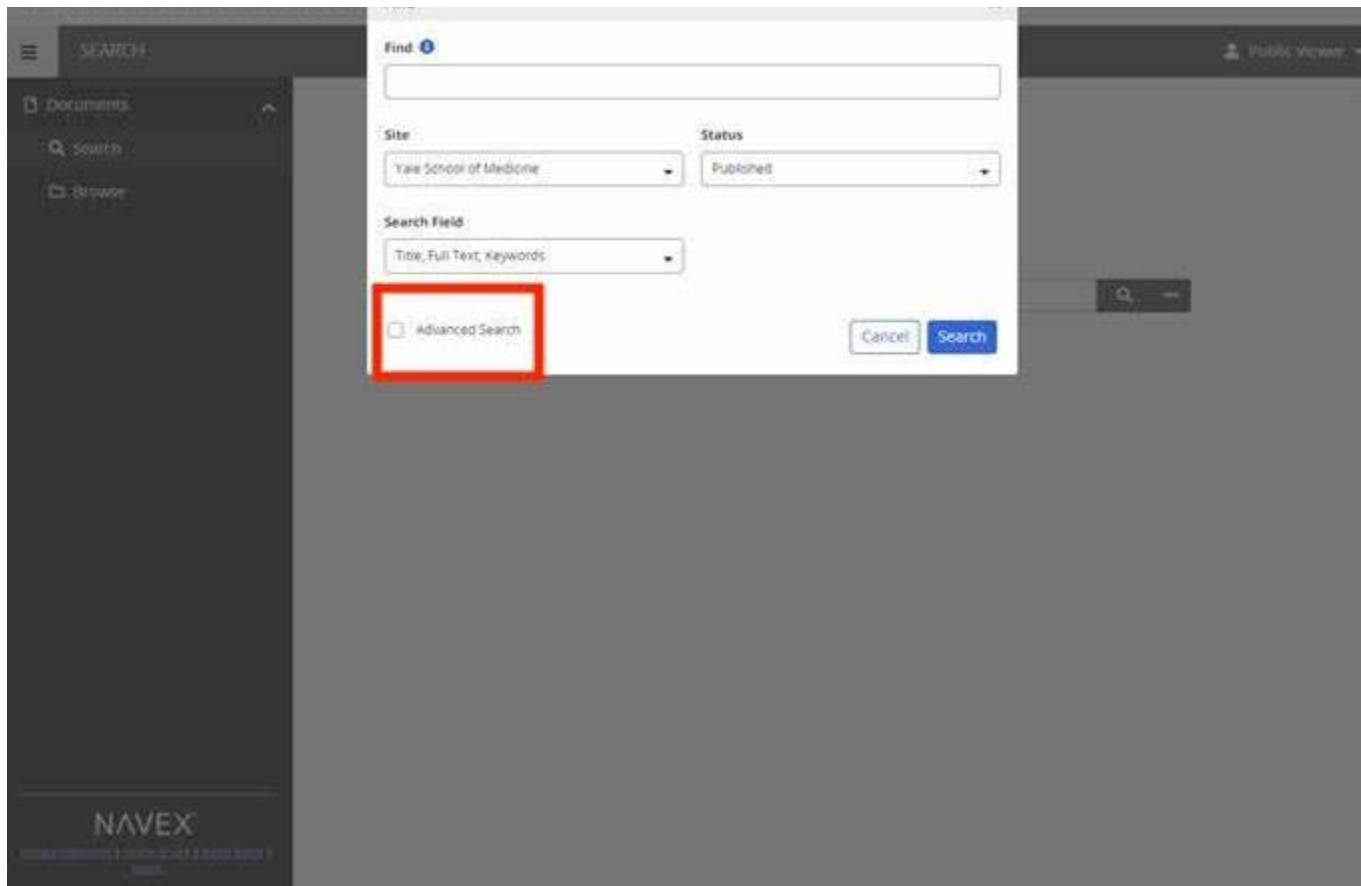
magnifying glass icon. Clicking the magnifying glass icon by itself displays all public documents in the system.

- **The "..."**
Click the "... " to get the Advanced Search Options.

Search for Document using the "Search" View



- Searching for a document using the "Search" view will always prompt the system to conduct a search across ALL published documents.



- Results can be further refined by clicking on the “...” and then selecting “Advanced Search” Option.

Keyword Search

Keyword searches titles, categories, all text of a document, and tagged keywords:

- **Type a single word**
This returns a list of documents that contain that word within the title, content, or tagged keywords.
- **Type multiple words**
This returns a list of all documents that contain all of those words

- **Type multiple words separated by OR**
This returns a list of documents that contain at least one of those words
- **Type a word preceded by NOT**
This returns a list of documents that do not contain that word
- **Type one or more words in quotation marks**
This returns documents that contain that exact text.

In case the document you are looking for does not appear in the search results, kindly send an email to isobottke@nunm.edu with your proposed keywords.

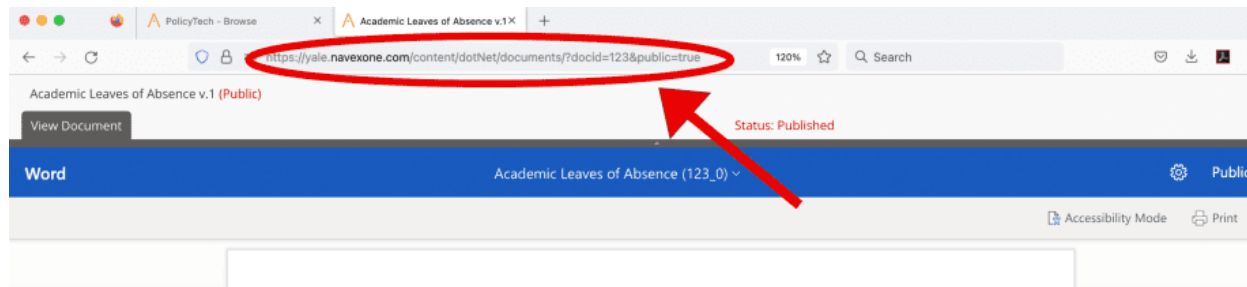
Categories and Search

- If you have a category selected and you type a keyword in the "Find" bar, ONLY the documents in that category are being searched for your keyword.

How to Share and Download

In order to share a document via email with another user you will need to copy the url of the document and paste it into your email client. There are two ways to do this.

Share from the Document

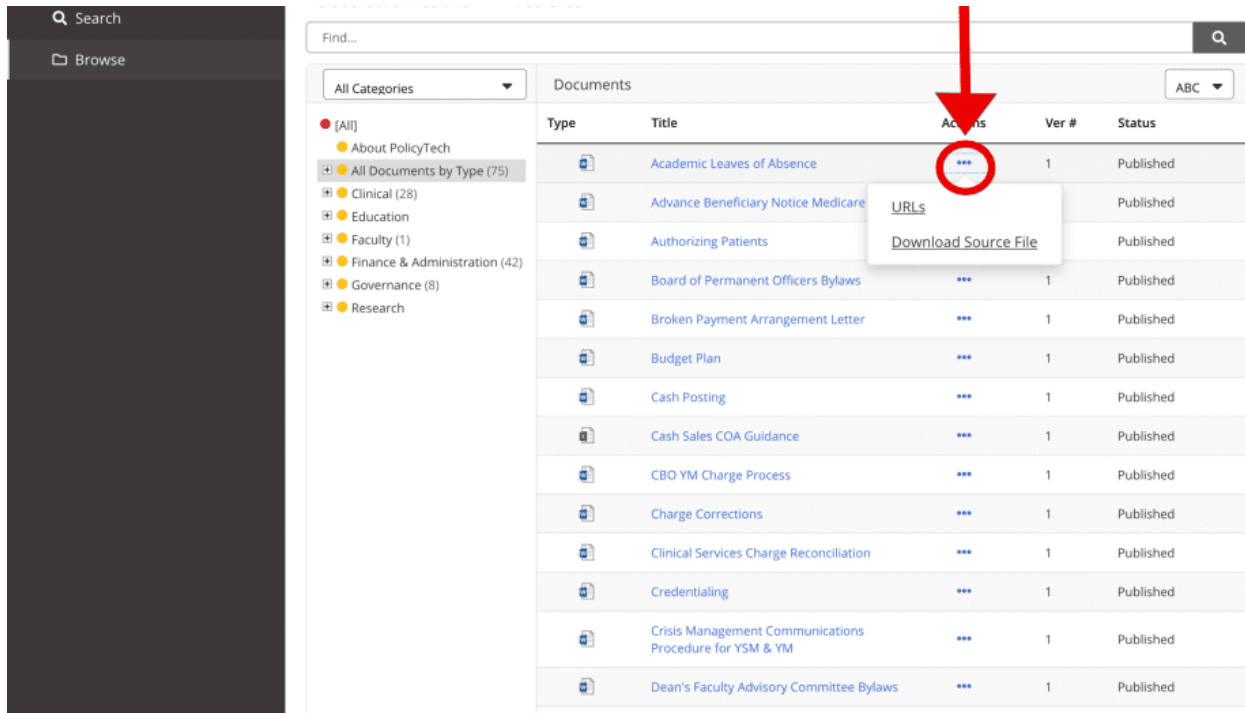


Share from Document View

To share a document via email, copy the url from the address bar of your web browser and paste it into an email you will send.

If you have the document open, copy the url of the document from your browser and paste it into an email client to share.

Share from Browse



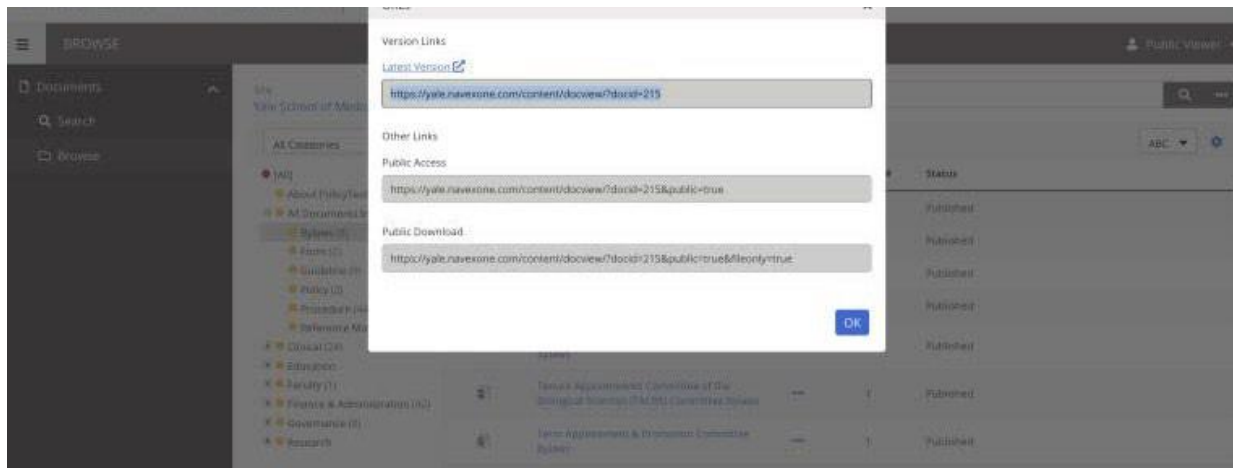
The screenshot displays a document management system interface. On the left is a dark sidebar with a search bar and a 'Browse' button. The main area shows a list of documents under the heading 'Documents'. A search bar is at the top right. A red arrow points to the 'Actions' column, which contains a three-dot menu icon. A dropdown menu is open, showing options for 'URLs' and 'Download Source File'.

Type	Title	Actions	Ver #	Status
	Academic Leaves of Absence	...	1	Published
	Advance Beneficiary Notice Medicare	URLs		Published
	Authorizing Patients	Download Source File		Published
	Board of Permanent Officers Bylaws	...	1	Published
	Broken Payment Arrangement Letter	...	1	Published
	Budget Plan	...	1	Published
	Cash Posting	...	1	Published
	Cash Sales COA Guidance	...	1	Published
	CBO YM Charge Process	...	1	Published
	Charge Corrections	...	1	Published
	Clinical Services Charge Reconciliation	...	1	Published
	Credentialing	...	1	Published
	Crisis Management Communications Procedure for YSM & YM	...	1	Published
	Dean's Faculty Advisory Committee Bylaws	...	1	Published

Download and Share

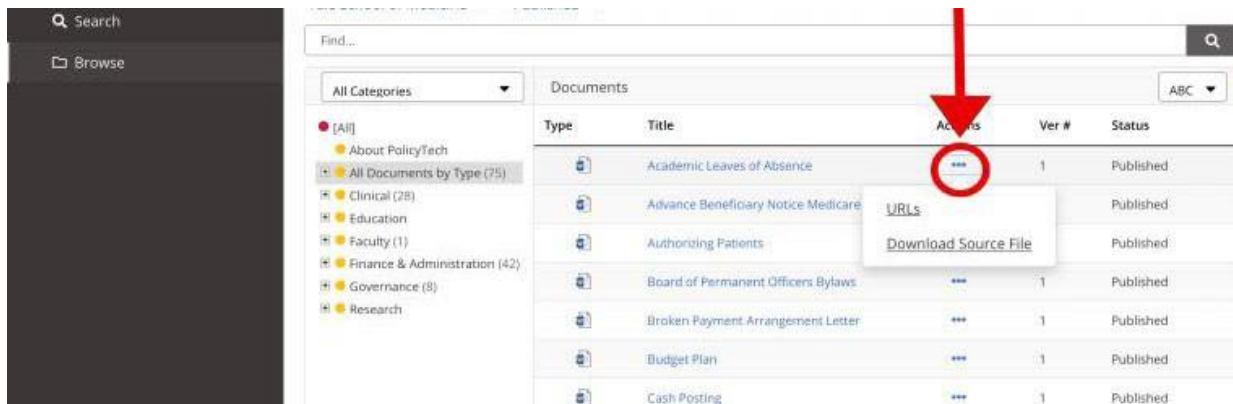
Click the "..." next to the file you want to share or download.

From the "Browse" view, click the "..." in the "Actions" column next to the file you would like to share. Select "URLs" from the drop-down menu, which provides you with three urls to copy. You will usually want to copy the Latest Version to share in your email.



This will provide you with a pop-up window with urls to copy. You will usually want to copy the “Latest Version” to share in your email:

Download a Document



In general, it is recommended that you always view documents in PolicyTech so you are seeing the most updated version of the information. However, if you need to download a document, click the three dots next to the file title you want to download, and select “Download Source File.” This will download the file onto your hard drive.

Help for Approvers

These instructions cover how to approve documents in NUNM's PolicyTech application tool. The intended audience is the licensed users who are assigned as approvers and are responsible for approving policies, procedures, and guidelines related to the National University of Natural Medicine.

Login

To start the drafting process, first visit [NUNM PolicyTech Website](#) and log in using your NUNM Outlook username and password.

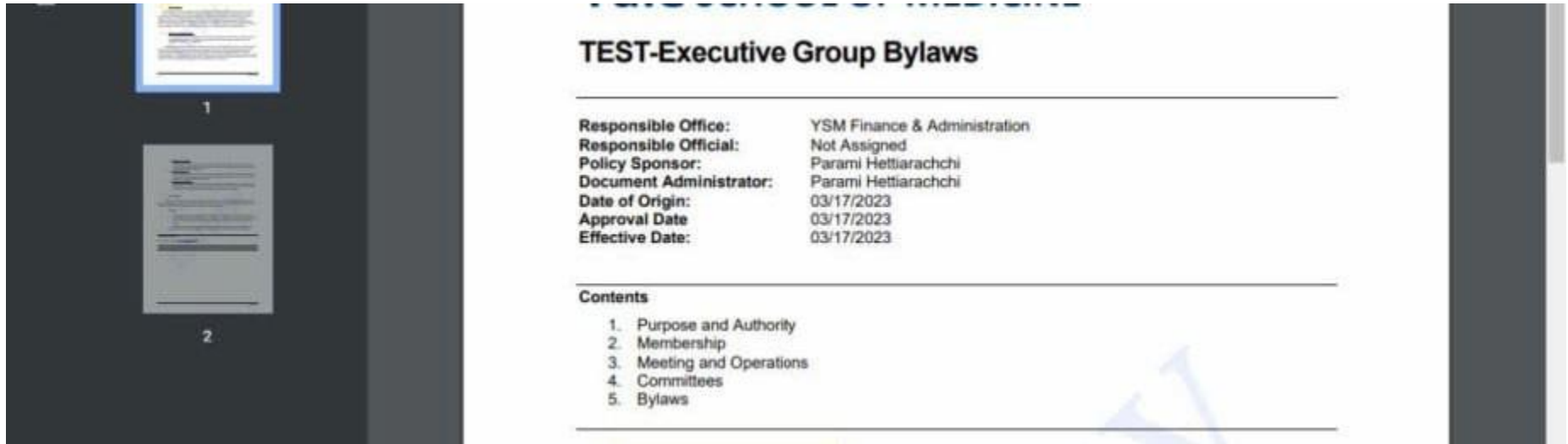
Document Selection



To access the document you want to approve, first, click on "My Tasks" located on the left-hand side navigation bar. Then, under the "Approve" section in the middle window, locate the desired document. Finally, select the document's title to open it.

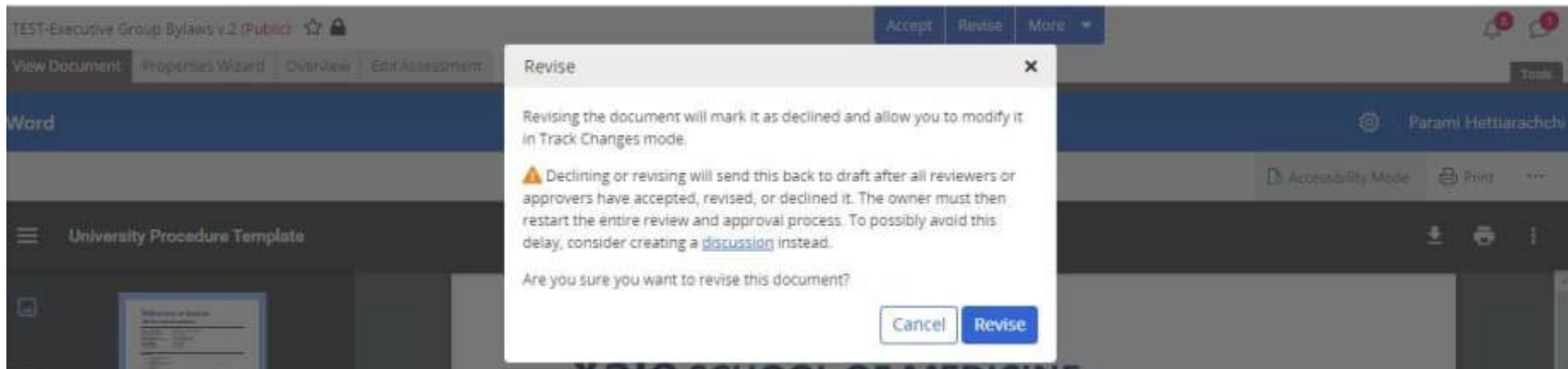
Alternatively, you can select the document to approve by clicking the link in the email that was sent to you as a task notification.

Accept or Revise



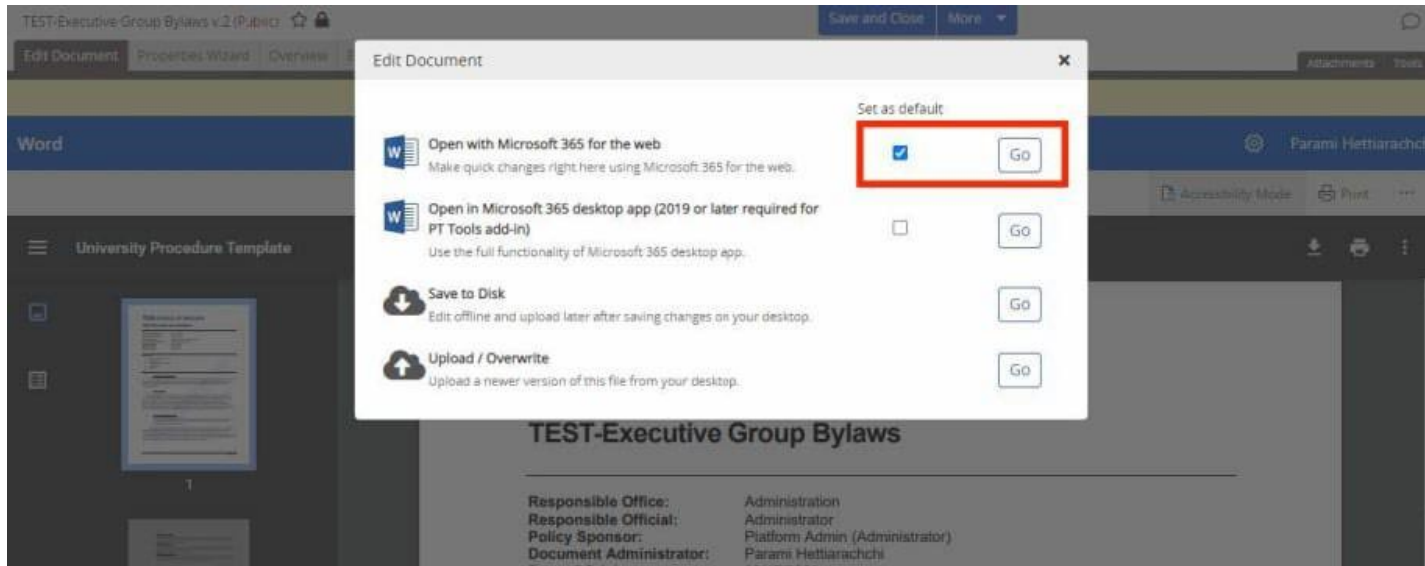
A preview of the policy document will then display in your web browser. From here, you may scroll through and review the document. You then have two options. You may: (A) select the "Accept" button at the top to approve it, and the document will close; or (B) select the "Revise" button, which will allow you to edit the document.

Revise



Once you click on the "revise" button, a pop-up window will appear informing you that the document will be marked as declined. You should then click on the "revise" button to continue.

Microsoft Word 365 Web Version



A preview of the document will then display in your web browser. To edit it, select the "Edit Document" button. This should default to opening the document in Microsoft Word's 365 web version. You may then edit the document as necessary, inserting comments where appropriate to explain your changes or pose questions or concerns.

Please Note: The first time you open a document in PolicyTech you will need to set default options. When prompted, check the "Set as Default" checkbox next to "Open in Microsoft 365 for the web." Then, select the "Go" button to the right.

By accessing the web version of the document, several writers/reviewers/approvers can collaborate and edit the document simultaneously, with changes being saved automatically. After completing the editing, click the "go back" button to return to the preview page.

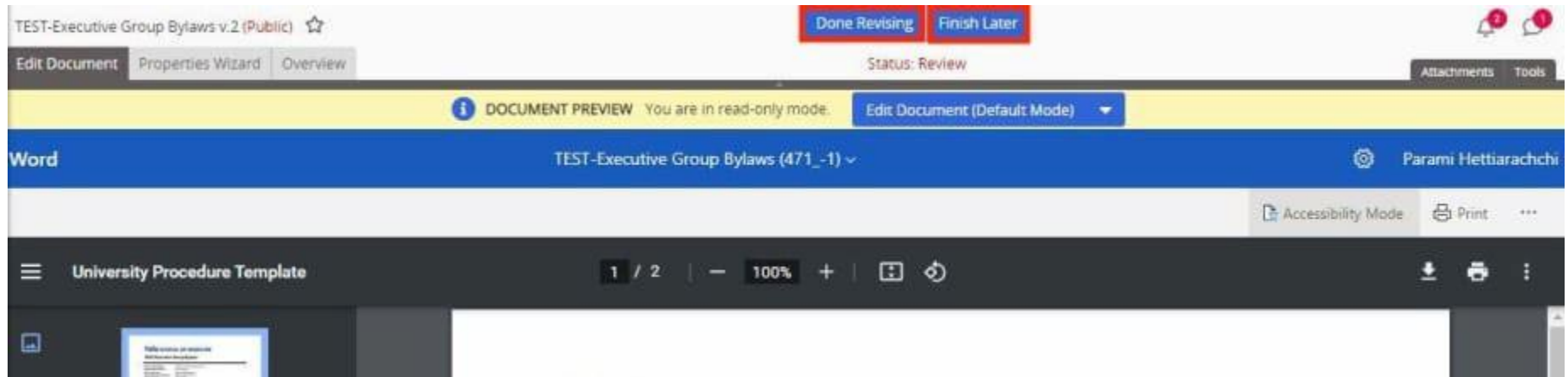
Microsoft Word 365 Desktop Application



Alternatively, users have the option to open the document with the Microsoft 365 desktop application, which will result the document to open in a separate Microsoft Word window.

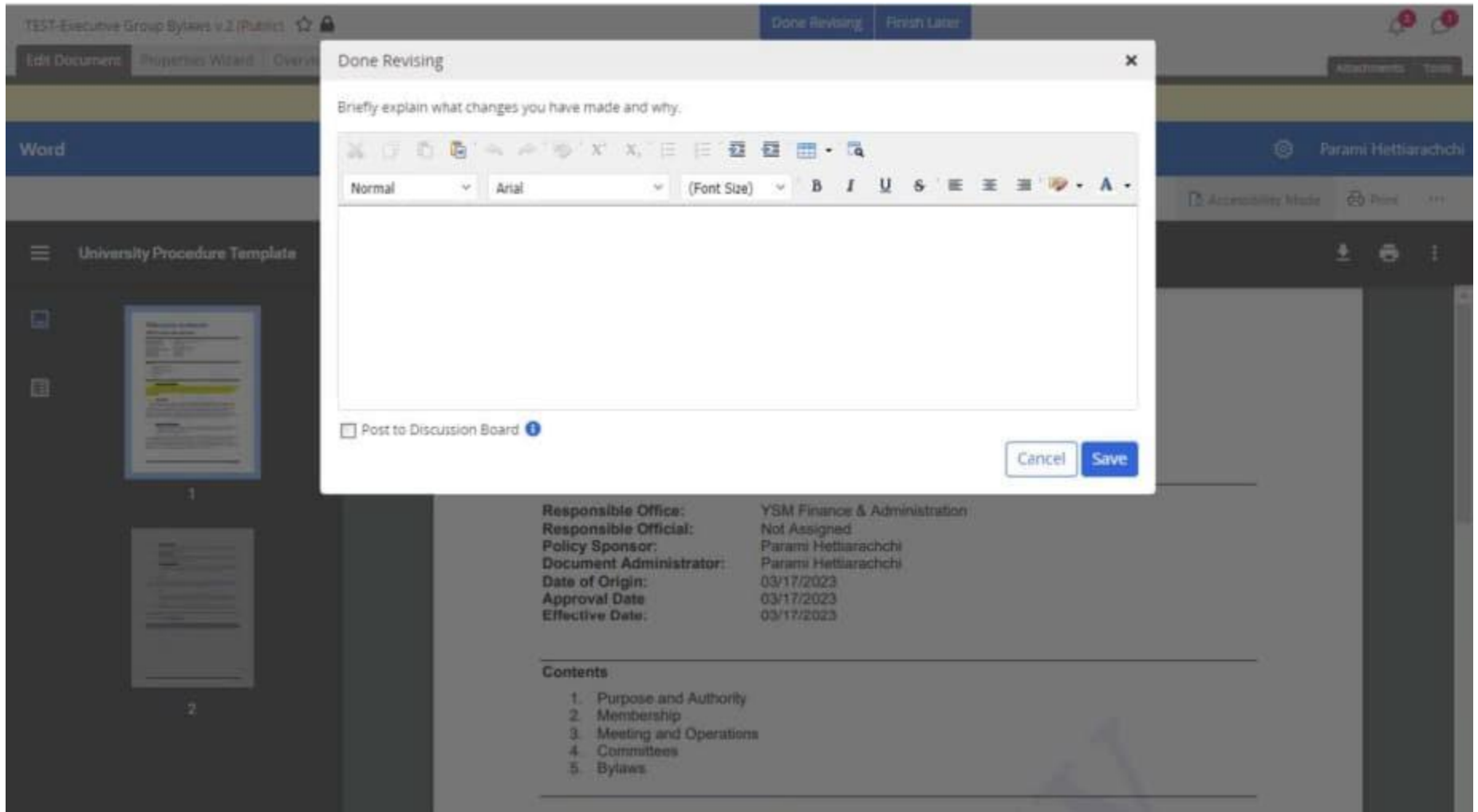
After finishing the edits, save and close the Word document to exit and return to the web browser. You should receive a message similar to the following: "Save and close Word then click Back to PolicyTech above." Click on the "Back to PolicyTech" button to go back to the preview page.

Close



Next, you have two choices: (A) if you have completed all of your edits on the document, click on the "Done Revising" button located at the top of your window, or (B) if you want to save your progress but resume editing the document at a later time, choose the "Finish Later" button instead. If you select "Finish Later," you will be taken back to your "My Tasks" list, and you will not need to follow the subsequent steps.

Comment



Once you select "Done Revising", type in any comments in the small window that appears and then click on "Save." The document will then be marked as "approved" in the workflow.

TEST-Executive Group Bylaws v.2 (Public) ☆

Submit to Writers Submit for Review More ▾

Edit Document Properties Wizard Overview Edit Assessment Status: Draft

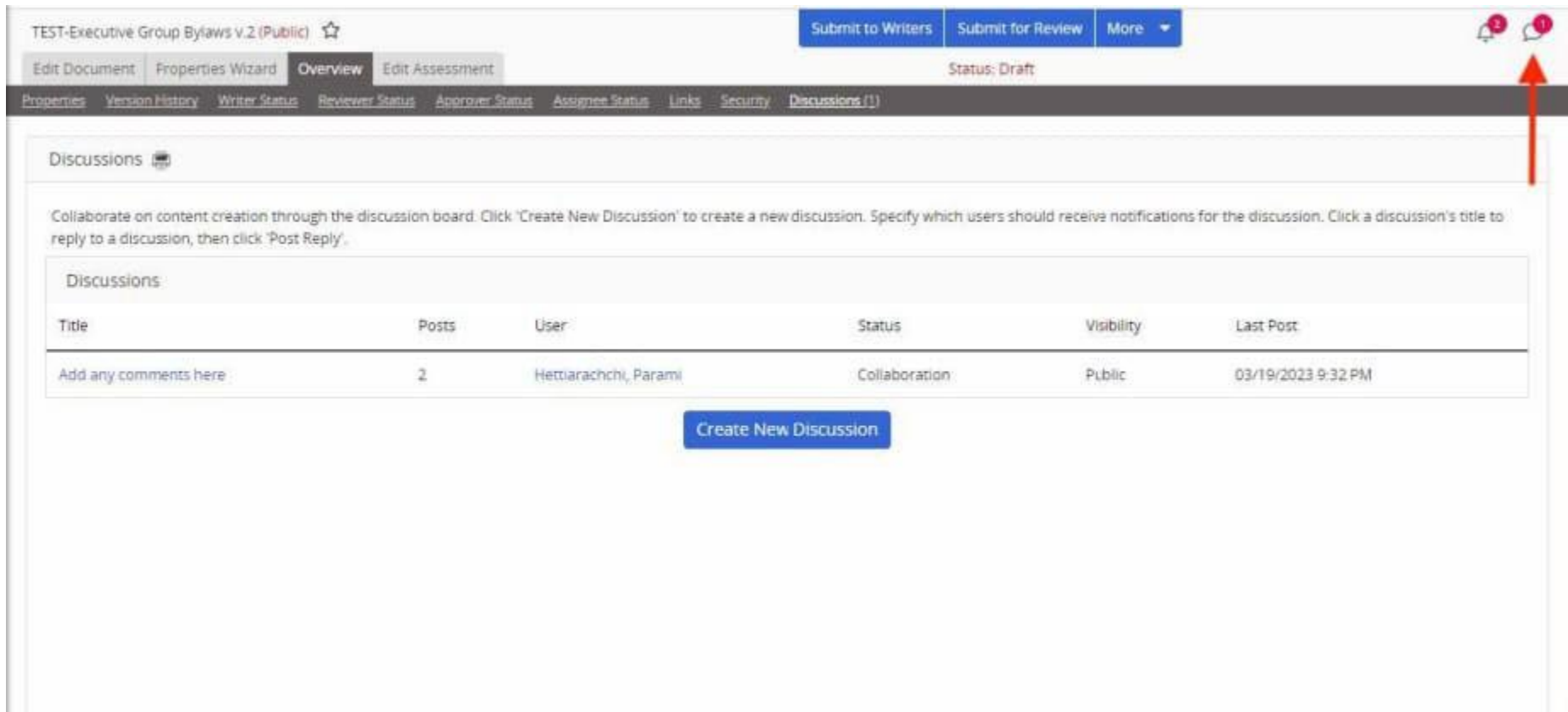
Properties Version History Writer Status Reviewer Status Approver Status Assignee Status Links Security Discussions (1)

Discussions 🗨

Collaborate on content creation through the discussion board. Click 'Create New Discussion' to create a new discussion. Specify which users should receive notifications for the discussion. Click a discussion's title to reply to a discussion, then click 'Post Reply'.

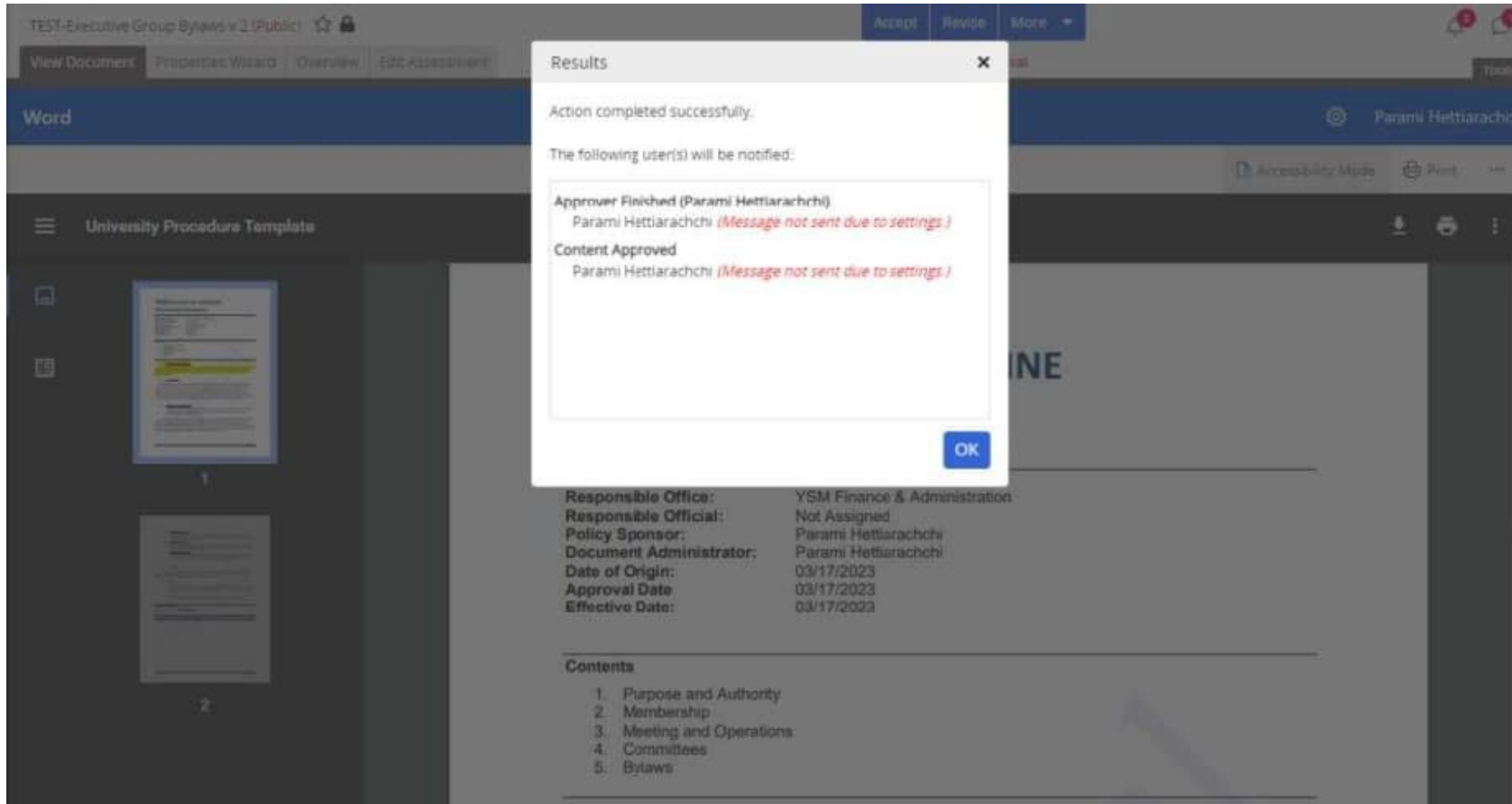
Title	Posts	User	Status	Visibility	Last Post
Add any comments here	2	Hettiarachchi, Parami	Collaboration	Public	03/19/2023 9:32 PM

Create New Discussion



Note: To add what you wrote to this document's discussion board where all assignees (writers/reviewers/approvers) can see it, click Post to Discussion Board. This allows for recipients to reply to your comments and for those 'discussions' to be stored with the content. Discussions can help clarify questions without having to go through another workflow cycle. Click on the Discussions link when viewing content to view and reply to discussions.

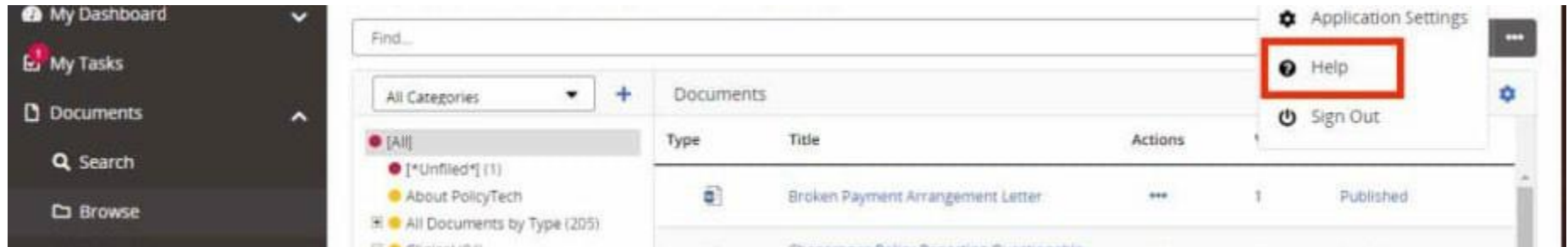
Confirm



Finally, a small window will appear, verifying who will receive notifications and who will not. Click on "Save" again, and the tab or window displaying the document should close.

Congratulations! You have successfully approved a document in PolicyTech.

Using PolicyTech Help



You can find answers to many of your questions by using the Help feature in the PolicyTech application. In the upper right corner, click your username, and then click “Help”. Browse the table of contents or search for a specific topic.

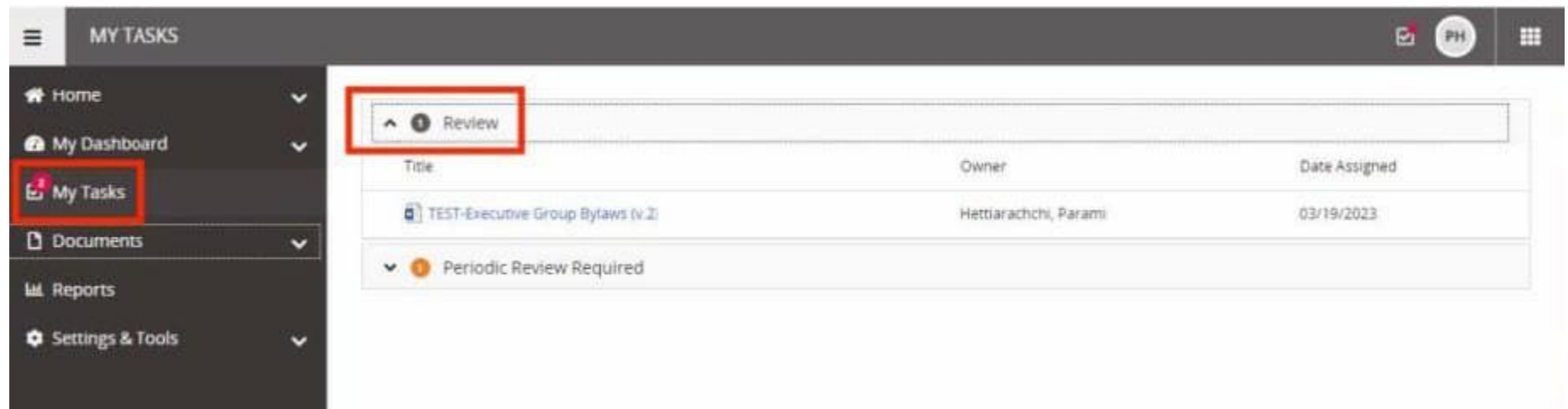
Help for Reviewers

These instructions cover how to edit documents in NUNM's PolicyTech application tool. The intended audience is the licensed users who are assigned as reviewers and are responsible for reviewing policies, procedures, and guidelines related to the National University of Natural Medicine.

Login

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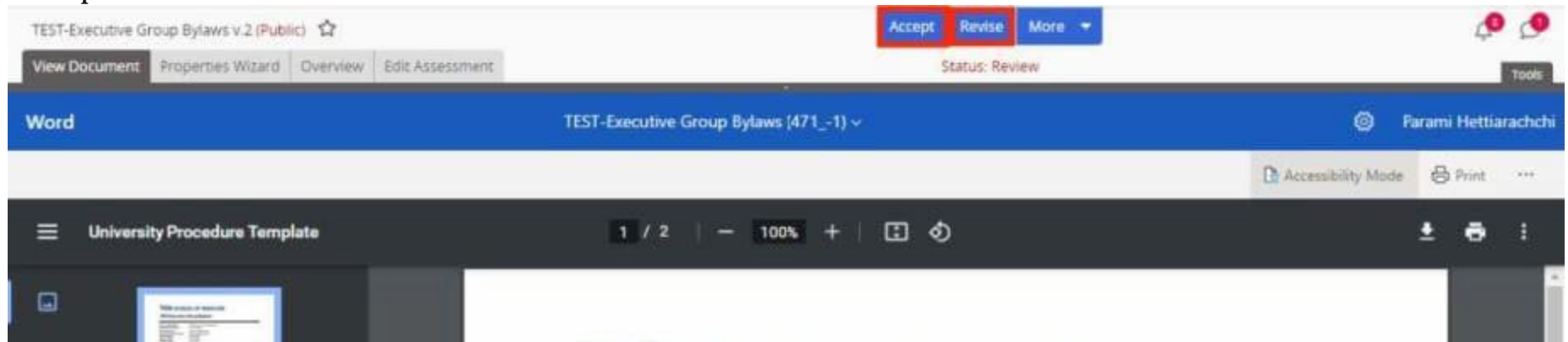
Document Selection



To access the document you want to review, first, click on "My Tasks" located on the left-hand side navigation bar. Then, under the "Review" section in the middle window, locate the desired document. Finally, select the document's title to open it.

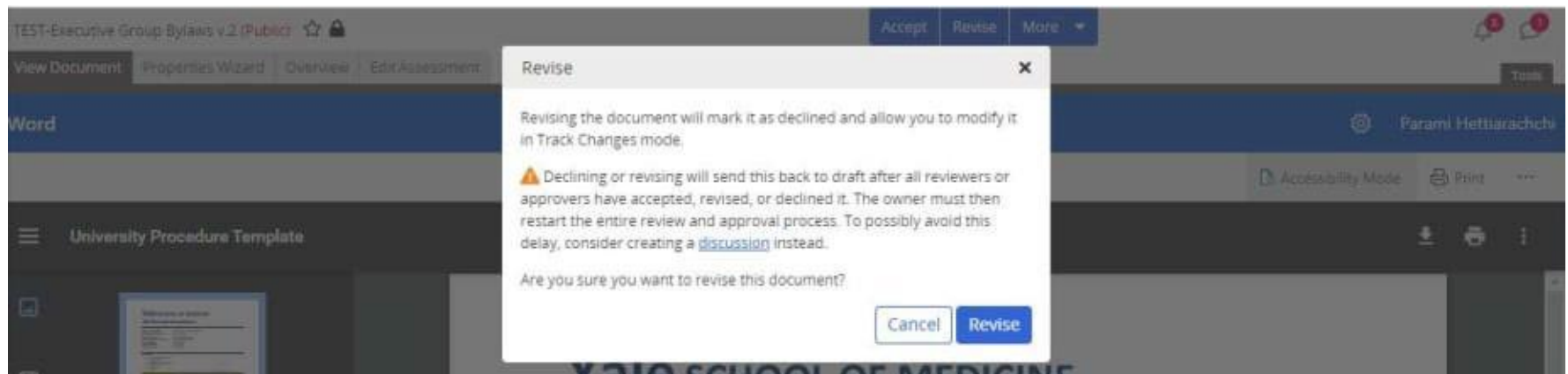
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Accept or Revise



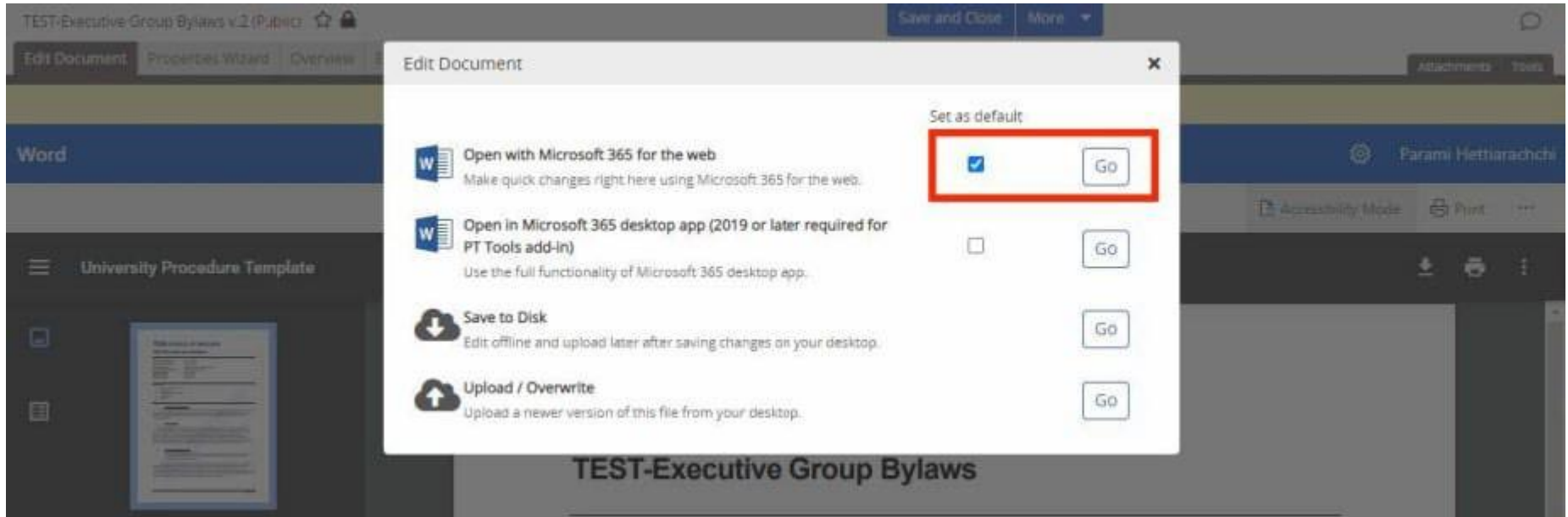
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Revise



Once you click on the "revise" button, a pop-up window will appear informing you that the document will be marked as declined. You should then click on the "revise" button to continue.

Microsoft Word 365 Web Version

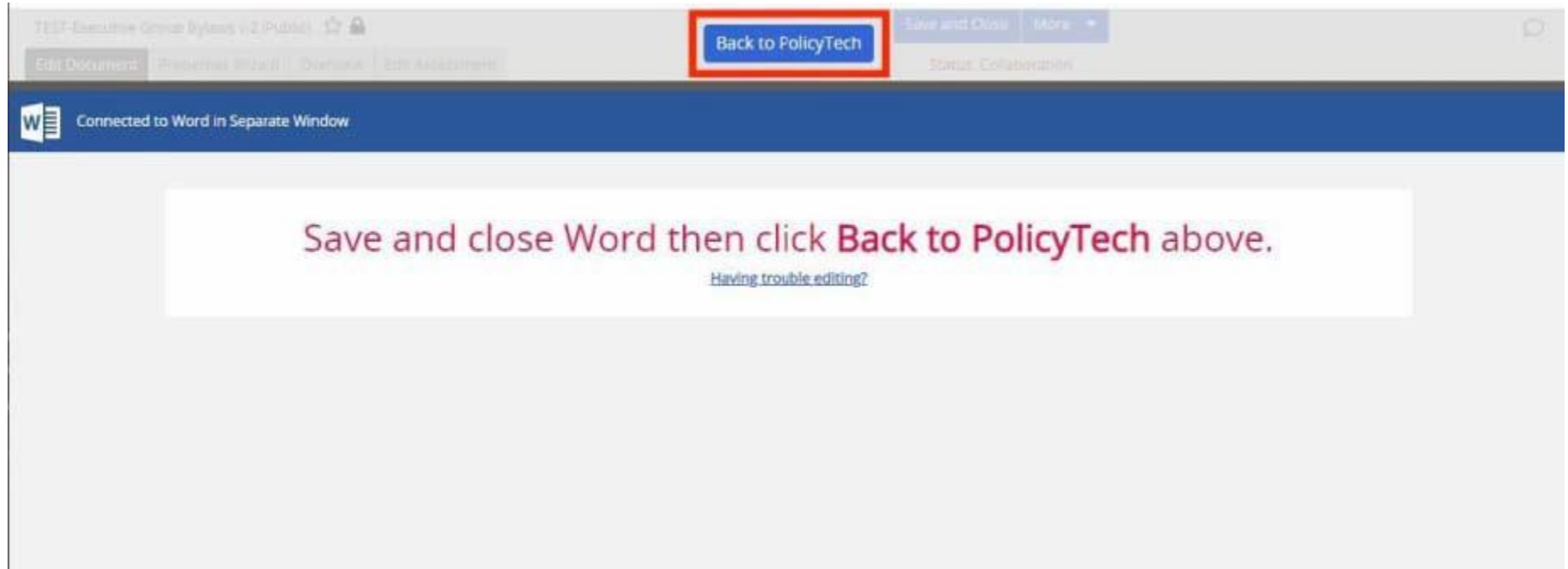


A preview of the document will then display in your web browser. To edit it, select the "Edit Document" button. This should default to opening the document in Microsoft Word's 365 web version. You may then edit the document as necessary, inserting comments where appropriate to explain your changes or pose questions or concerns.

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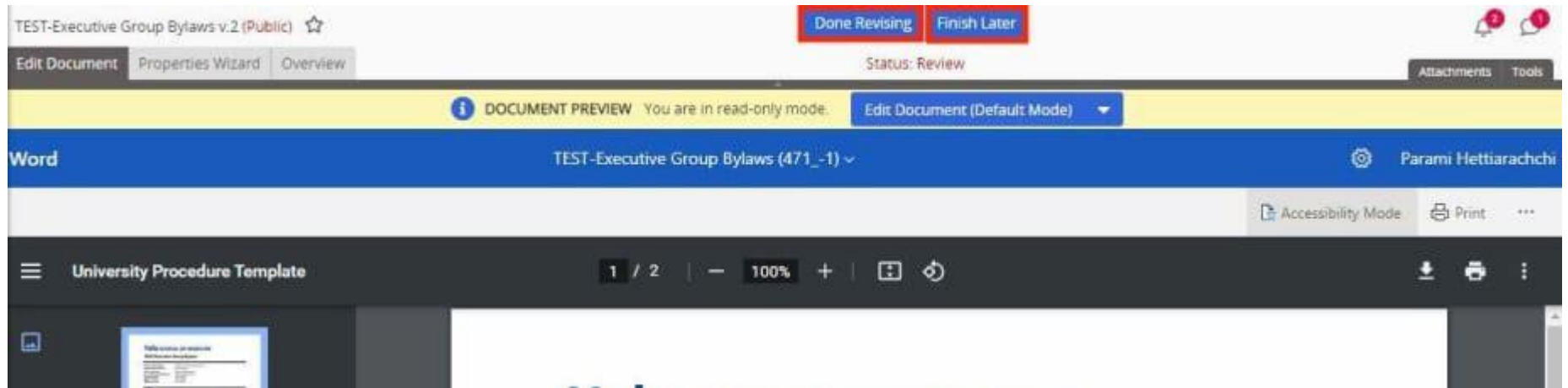
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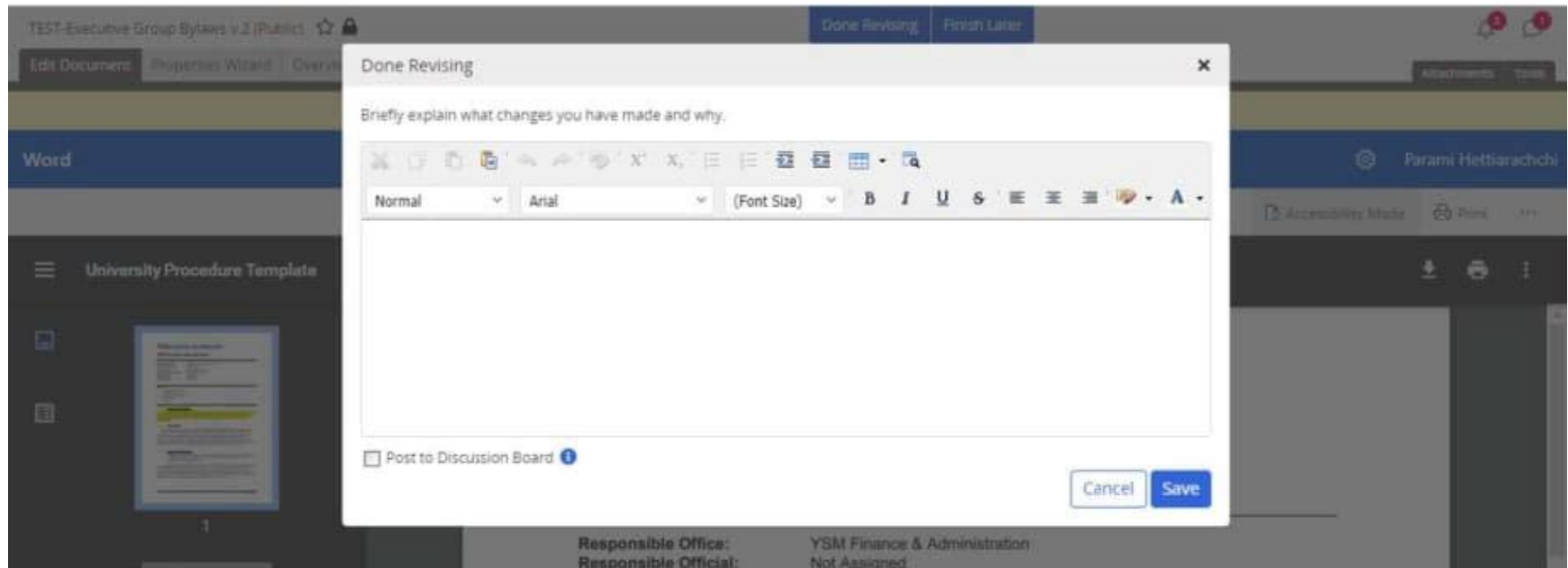
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Comment



Once you select “Done Revising”, type in any comments in the small window that appears and then click on "Save." The document will then be marked as “approved” in the workflow.

TEST-Executive Group Bylaws v.2 (Public) ☆

Submit to Writers Submit for Review More ▾

Edit Document Properties Wizard **Overview** Edit Assessment Status: Draft

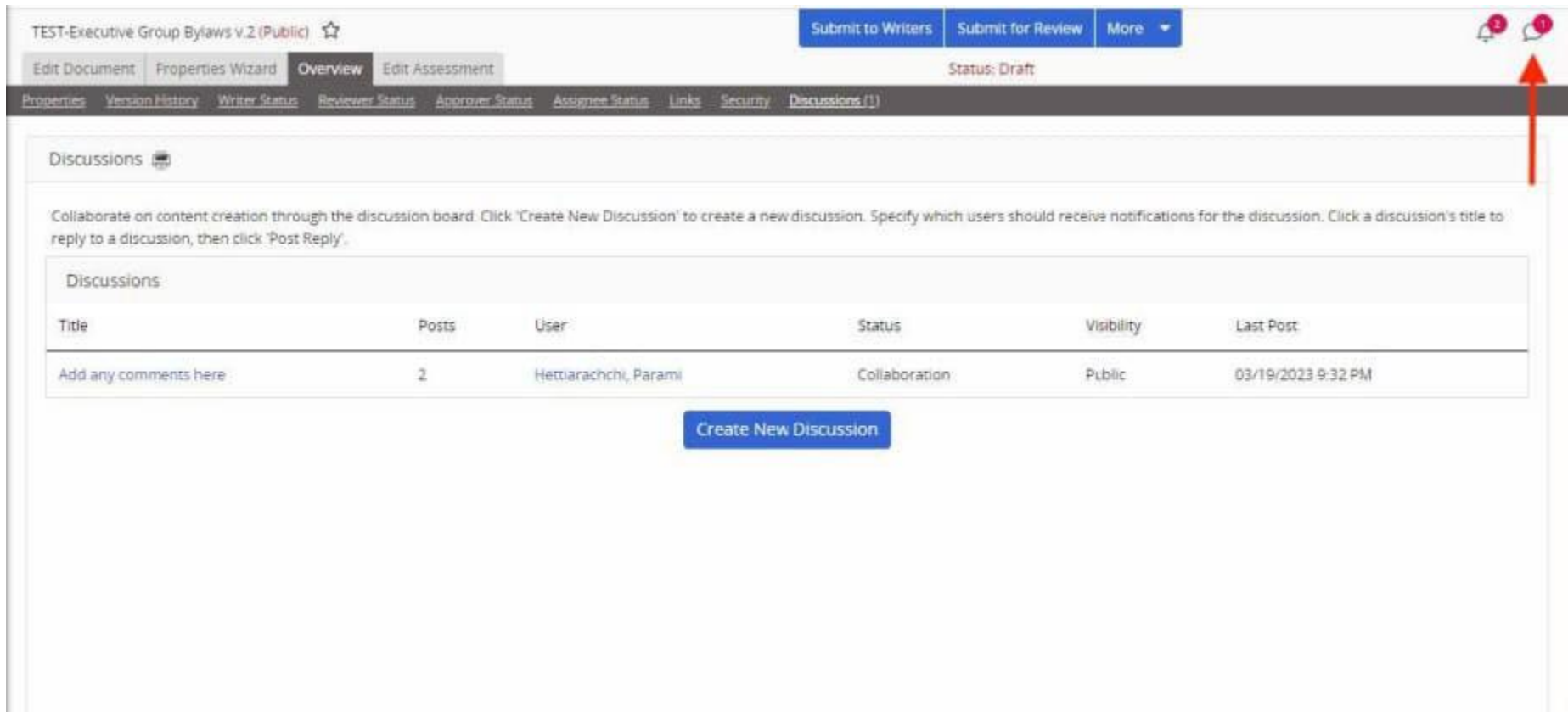
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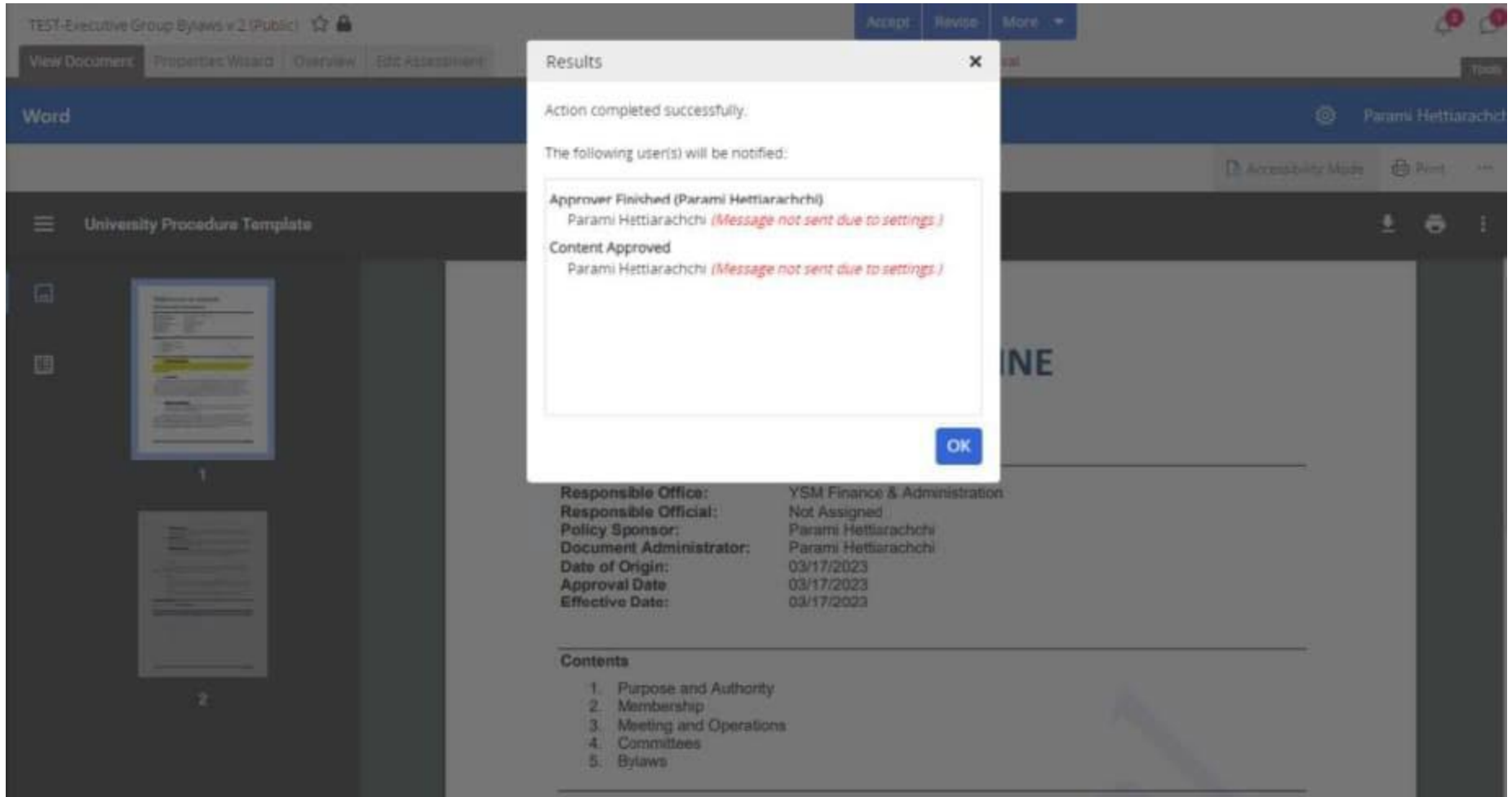
Title	Posts	User	Status	Visibility	Last Post
Add any comments here	2	Hettiarachchi, Parami	Collaboration	Public	03/19/2023 9:32 PM

Create New Discussion



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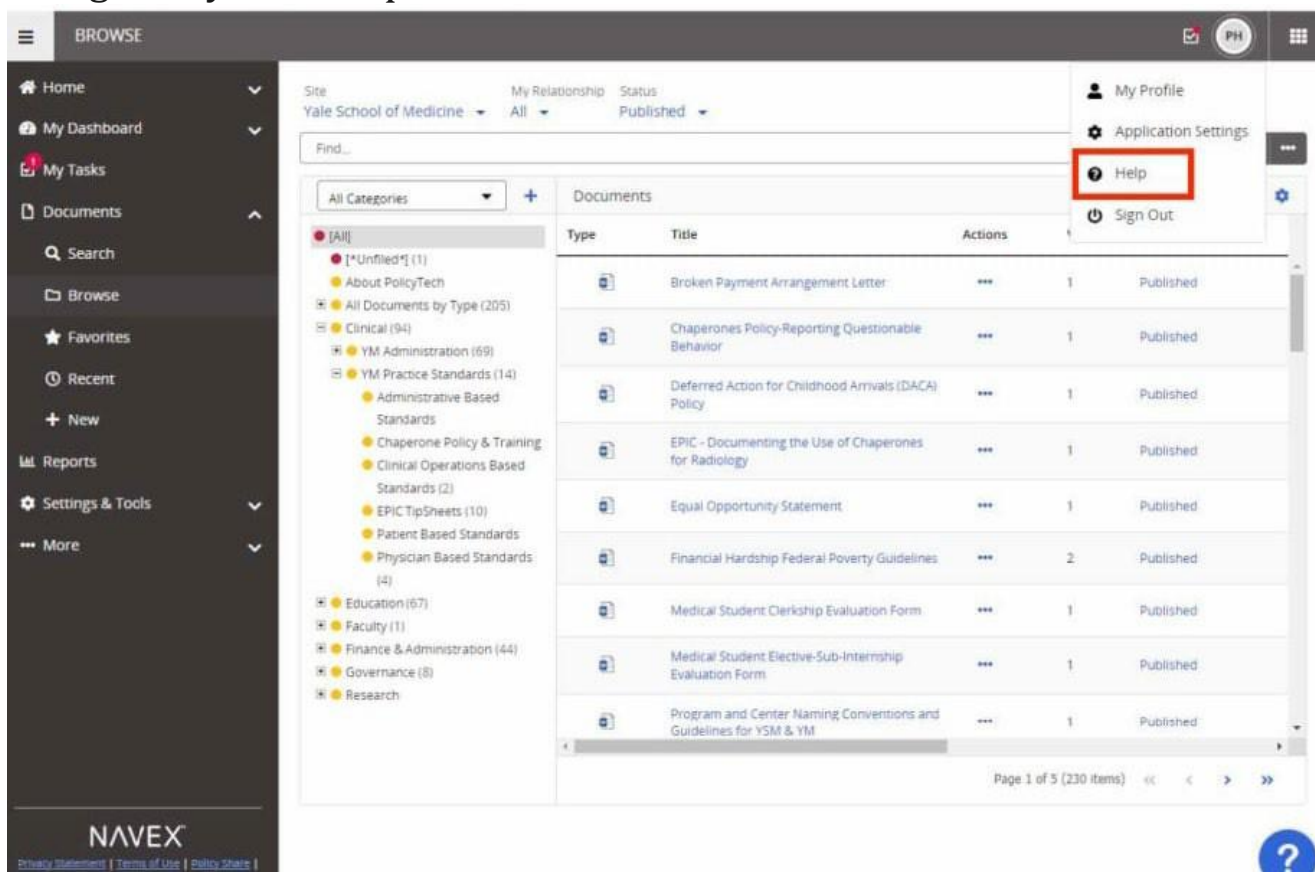
Confirm



Finally, a small window will appear, verifying who will receive notifications and who will not. Click on "Save" again, and the tab or window displaying the document should close.

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Using PolicyTech Help



You can find answers to many of your questions by using the Help feature in the PolicyTech application. In the upper right corner, click your username, and then click “Help”. Browse the table of contents or search for a specific topic.

Help for Writers

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To start the drafting process, first visit [NUNM PolicyTech Website](#) and log in using your NUNM Outlook Username and password.

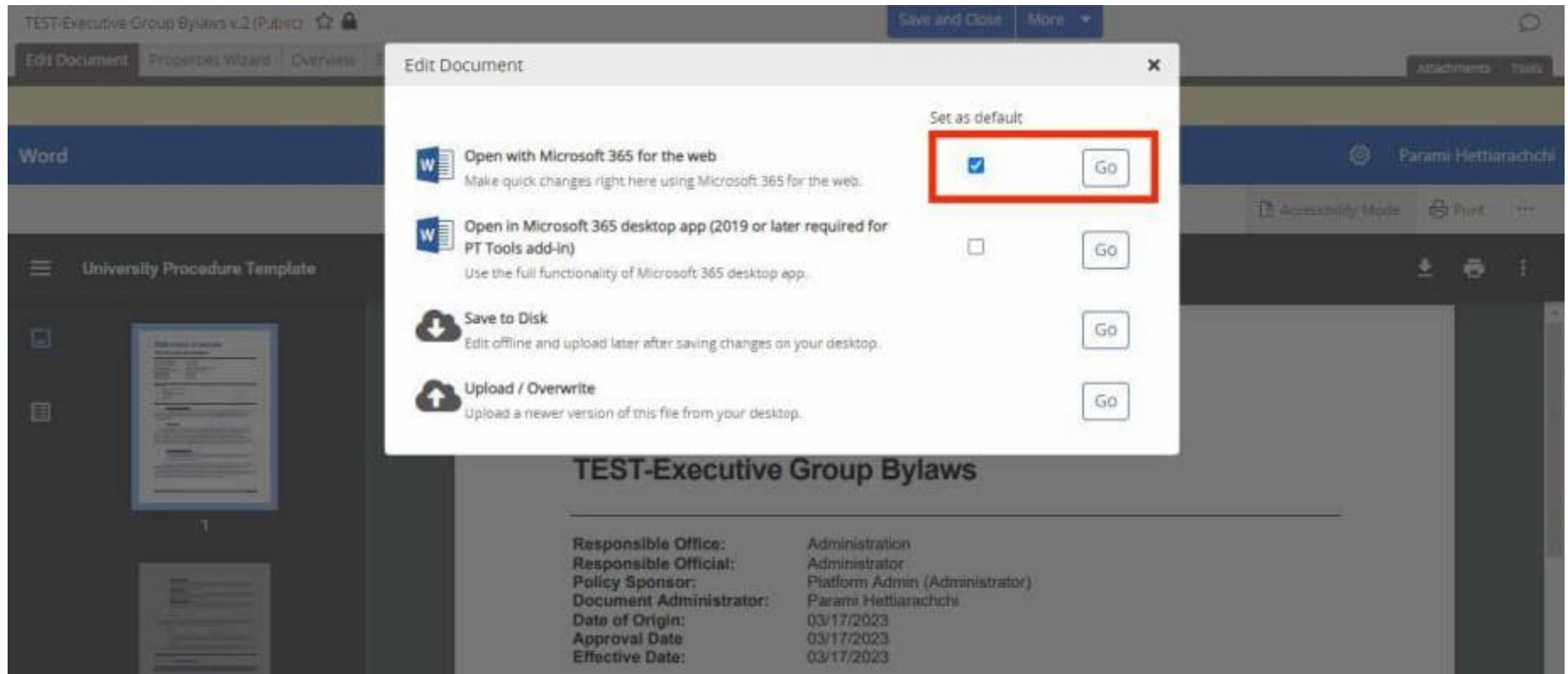
Document Selection



To access the document you want to edit, first, click on "My Tasks" located on the left-hand side navigation bar. Then, under the "Collaborate" section in the middle window, locate the desired policy. Finally, select the policy's title to open it.

Alternatively, you can select the document to edit by clicking the link in the email that was sent to you as a task notification.

Edit: Microsoft Word 365 Web Version



A preview of the document will then display in your web browser. To edit it, select the "Edit Document" button. This should default to opening the document in Microsoft Word's 365 web version. You may then edit the document as necessary, inserting comments where appropriate to explain your changes or pose questions or concerns. **Make sure to activate the track changes feature by navigating to the review tab and choosing "Track changes for everyone".**

Please Note: The first time you open a document in PolicyTech you will need to set default options. When prompted, check the "Set as Default" checkbox next to "Open in Microsoft 365 for the web." Then, select the "Go" button to the right.

By accessing the web version of the document, several writers can collaborate and edit the document simultaneously, with changes being saved automatically. After completing the editing, click the "go back" button to return to the preview page.

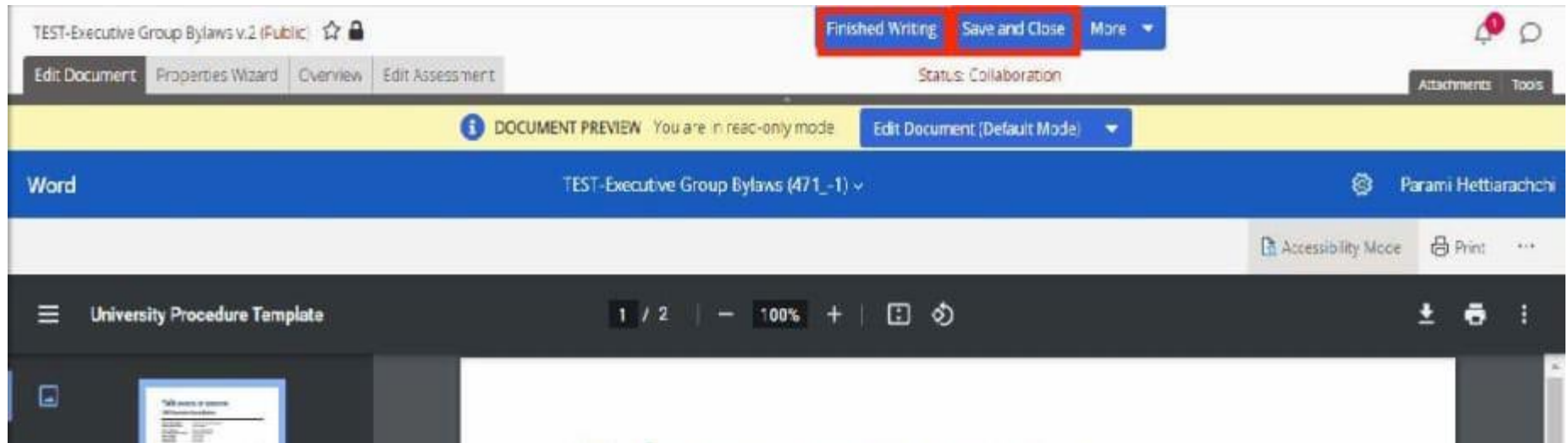
Edit: Microsoft Word 365 Desktop Application



Alternatively, users have the option to open the document with the Microsoft 365 desktop application, which will result the document to open in a separate Microsoft Word window.

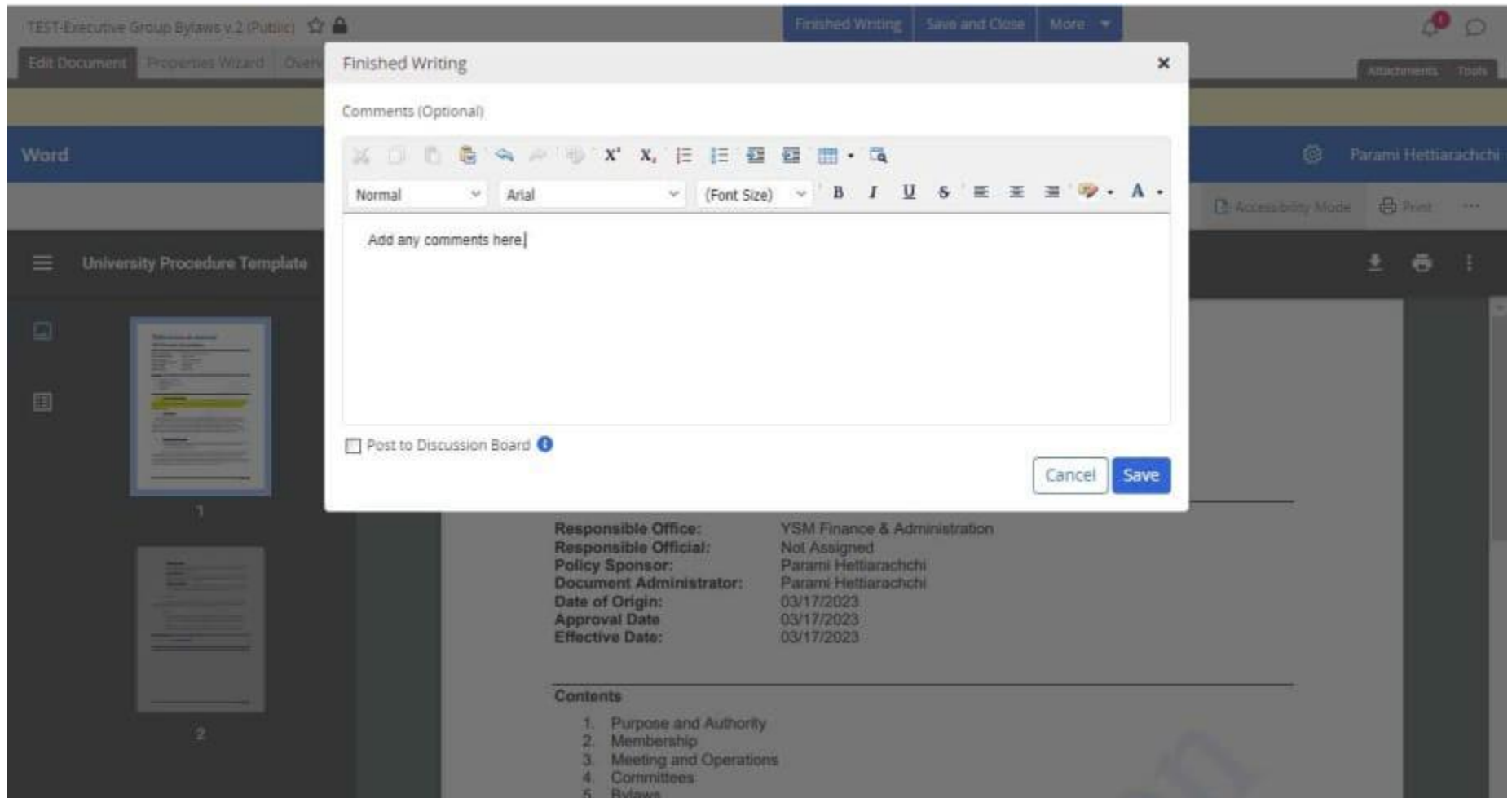
After finishing the edits, save and close the Word document to exit and return to the web browser. You should receive a message similar to the following: "Save and close Word then click Back to PolicyTech above." Click on the "Back to PolicyTech" button to go back to the preview page.

Close



Next, you have two choices: (A) if you have completed all of your edits on the document, click on the "Done Revising" button located at the top of your window, or (B) if you want to save your progress but resume editing the document at a later time, choose the "Finish Later" button instead. If you select "Finish Later," you will be taken back to your "My Tasks" list, and you will not need to follow the subsequent steps.

Comment



Once you select “Finished Writing”, type in any comments in the small window that appears and then click on “Save.” The document will then progress to the next stage in the workflow.

TEST-Executive Group Bylaws v.2 (Public) ☆

Submit to Writers Submit for Review More ▾

Edit Document Properties Wizard **Overview** Edit Assessment Status: Draft

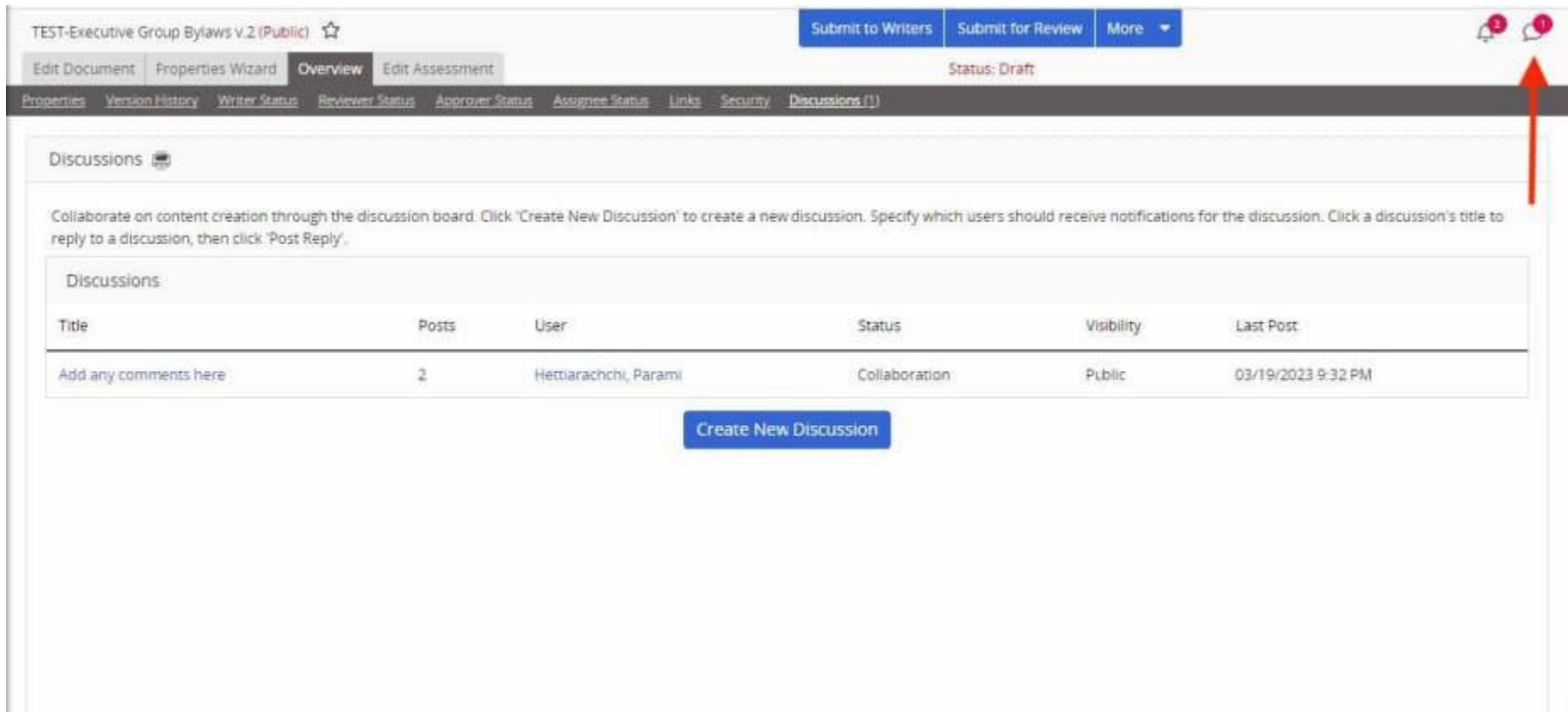
Properties Version History Writer Status Reviewer Status Approver Status Assignee Status Links Security Discussions (1)

Discussions 🗨️

Collaborate on content creation through the discussion board. Click 'Create New Discussion' to create a new discussion. Specify which users should receive notifications for the discussion. Click a discussion's title to reply to a discussion, then click 'Post Reply'.

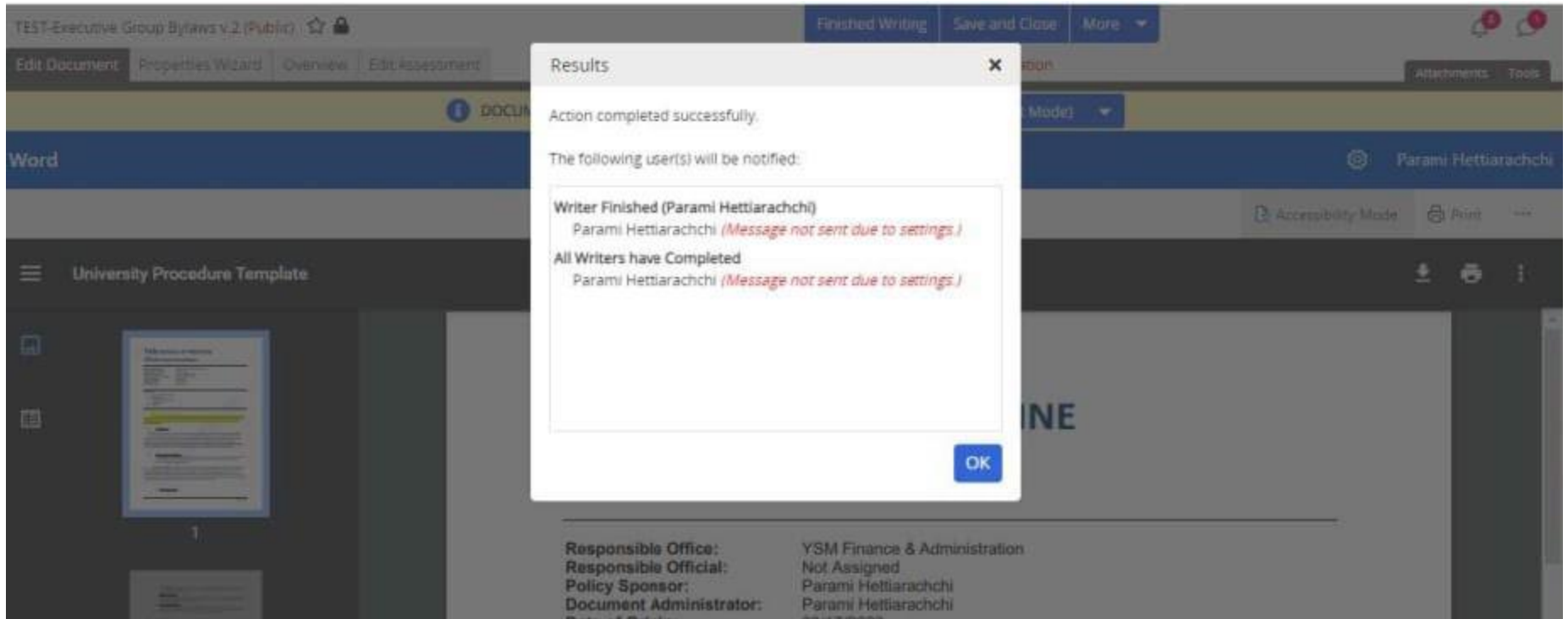
Title	Posts	User	Status	Visibility	Last Post
Add any comments here	2	Hettiarachchi, Parami	Collaboration	Public	03/19/2023 9:32 PM

Create New Discussion



Note: To add what you wrote to this document's discussion board where all assignees (writers/reviewers/approvers) can see it, click Post to Discussion Board. This allows for recipients to reply to your comments and for those 'discussions' to be stored with the content. Discussions can help clarify questions without having to go through another workflow cycle. Click on the Discussions link when viewing content to view and reply to discussions.

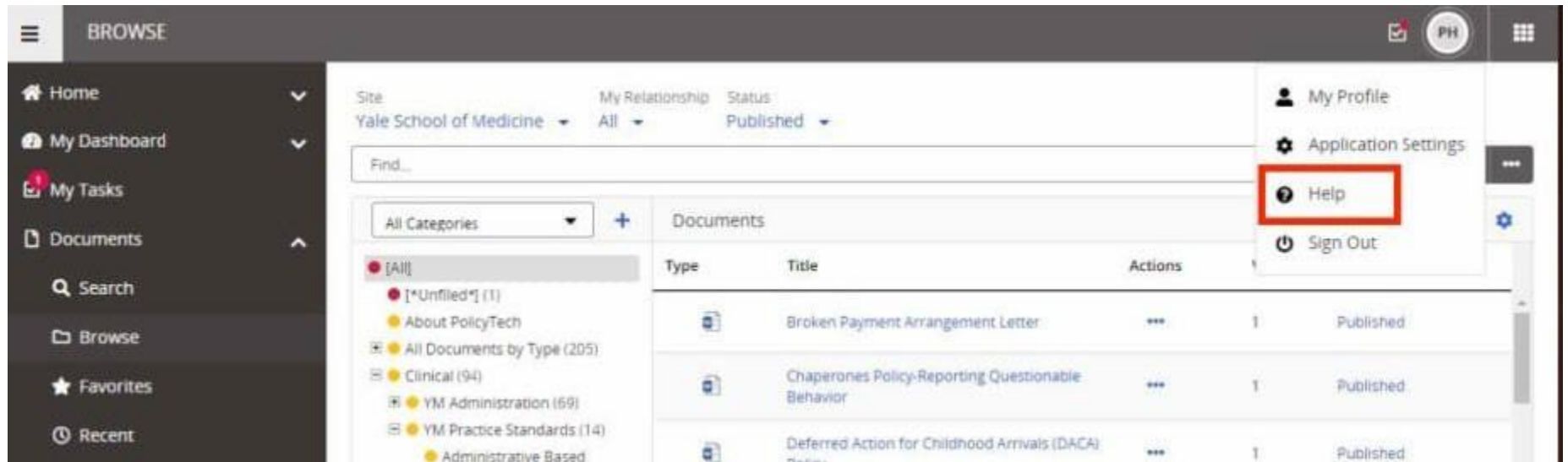
Confirm



Finally, a small window will appear, verifying who will receive notifications and who will not. Click on "Save" again, and the tab or window displaying the document should close.

Congratulations! You have successfully edited a document in PolicyTech.

Using PolicyTech Help



You can find answers to many of your questions by using the Help feature in the PolicyTech application. In the upper right corner, click your username, and then click “Help”. Browse the table of contents or search for a specific topic.

PolicyTech General FAQs

Which documents are included in PolicyTech?

PolicyTech comprises all the specified policies, procedures, guidelines, forms and reference documents specific to the National University of Natural Medicine.

In case of discovering an error in a document in PolicyTech, what should I do?

You can report the error by contacting isobottke@nunm.edu

If I have a specific question regarding the content of a document, what should I do?

Please contact the policy sponsor and document administrator indicated on the document to seek clarification for any specific questions related to its content.

What should I do if I am unable to locate a document within PolicyTech?

If you cannot find a document in PolicyTech, please contact isobottke@nunm for further assistance.

Who has access to the documents in PolicyTech?

Access to view most PolicyTech documents is available to the public with some documents limited to users who are on an NUNM IP address.

Whom should I contact to provide suggestions for improving PolicyTech?

Send your suggestions for improving PolicyTech to isobottke@nunm.edu.