



## **Searching for Policies and Procedures**

This instruction sheet will review the multiple ways to complete a Search within PolicyStat.

Note: PolicyStat refers to both Policies and Procedures as Policies. LifeWays identifies Polices and Procedures using a number series. Policies are identified by a four-digit number: 00-00. Procedures are identified with a six-digit number: 00-00.00. Instruction sheets will refer to all documents as Procedures.

Definitions:

General Search – Search for procedures by using key words located anywhere within the document.

Title Search- Search for procedures based on its Titled name.

Area Search – Search for procedure bases on assigned Area/Department.

Owner Search – Search for procedures bases on the Owner (Restrictions may apply based on security).

### **General Search**

1) From the Home page in PolicyStat, type key words in the **Search policies by typing here** field.

LifeWays							Q Policy Stat
Home	Q, Title	Q, Area	Q Owner	Q Audience	Admin		
Q Search polic	cies by typing here.			Se	earch Policies		
						Home	
Politike B Politike D	ngaling The A Let Fai Rentee	()			Search policies by typing here	Page name shows here and on Tab	Policy Recognition

2) Type Key words, then click **Search Policies** button.

Home	Q, Title	Q Area	Q Owner	Q Audien	ce	Admin				
<b>Q</b> Person Cente	red plan				Sear	ch Policies				
		<u>`</u>							Home	
Policias Ro Policias Do	quiring Tear J a For Besley	Key V	Vords Here	e			Search Policies			
	Feet.					b	outton here	5		1806
V			Ū						21	

3) To view the desired procedure, select by clicking the Title Name hyperlink.

		Search %				
© 1	You may be able to improve these sea	arch results by setting your default area in My Account				×
Sear	ch results for "Person Centered plan"	Click Title name here				
-	Title	Preview	Area	Last Revised	Last Approved	Effective Date
Edit	04-02.22 Person-Centered Planning %	. 1.1 LifeWays Operating Procedures 02-01.02 Suitable Services, Treatment Environment, Person-Centered Planning 04-02.23 Enhanced Health Services Prescription Requirement 05-01	04.00 Utilization Management	02/2019	02/2019	2/21/2019
Edit	02-01.02 Suitable Services, Treatment Environment, Person- Centered Planning	to person-centered, individualized treatment suited to his/her condition, including: a person-centered planning process is used to develop a written Individual Plan of	02.00 Recipient Rights	02/2019	02/2019	2/7/2019

# **Title Search**

1) To search by Title of the procedure, select the Title tab at the top of the page.

Home Q. Title Q. Area Q. Ow	er Q Audience Admin	
	Search By Title %	
	Search	
	Search	
Title Tab here		
	Search Titles	
	Browse by Title	
	0  1  3  4  5  6  8  9  A  0  E  H  S  T  W	

2) Type the name or key words of the title in the Search field or select the **Browse by Title** hyperlink. Then click **Search Title** button.



3) To view the desired procedure, select by clicking the Title Name hyperlink.

	Search By Title %
	Search
	Access
	Search Titles
Title name hyperlink here	Browse by Title
	0   1   3   4   5   6   8   9   A   D   E   H   S   T   W
	10 Results ordered by relevance
Title	Preview
Edit 02-03.01 Access to Case Records/Confidentiality	PURPOSE To ensure the recipient his or her rights of access and confidentiality. DEFINITIONS 1. Confidentiality and Disclosure -
	All Information related to recipients is
Edit 07-02.02 Information Access and Security	PURPOSE The Information Technology (IT) Team is responsible for assigning and monitoring the access and security of all LifeWays computer systems. RESPONSIBILITIES 1. Every user

# Search By Area

1) To search for a procedure by a Specific Area (Department), click on the **Area** tab at the top of the page.

Home Q Title	Q Area Q Owner	Q Audience Admin	
	Area Tab here	Search By Area 3       Filter       Double click areas to limit your search to policies in those areas.       Areas:       Areas:       Available:       Selected:       01.00 Governance       03.00 Financial Management       04.00 Ulization Management       05.00 Cinical Care Services       06.00 Customer Services       07.00 Information Services       07.00 Information Services       07.00 Information Services       Filter	*
		Search Search Policies	

Search Area using the filter box. Area is located on the left side of the filter box under Available box. Double click the desired area, so that it displays in the right side of the filter box under Selected box. Use the scroll bar to view complete list of Areas.
 Note: Multiple Area can be selected during the same search by double clicking each desired Area.

Double click areas to limit your search to policies i Areas:	n those areas.	
Available:	Selected:	
01.00 Governance 03.00 Financial Management 04.00 Utilization Management 05.00 Clinical Care Services 06.00 Customer Services 07.00 Information Services Filter	Scroll Bar here	

3) Double click the desired Area to displayed it in the **Selected** box. (You can choose to select more than one Area). Once Area(s) are showing in the **Selected** Box. Use the Text Box for key words to narrow the search. Then select the **Search Polices** button.

Search	n By Area 🛚 🍾
Filter	
Double click areas to limit your search to policies in those are	as.
Areas:	Selected:
01.00 Governance 03.00 Financial Management 04.00 Utilization Management 05.00 Clinical Care Services 06.00 Customer Services 07.00 Information Services	02.00 Recipient Rights
Filter Key word t	text box
Search	Search Policies
s	search Policies

4) To view the desired procedure, click on the Title hyperlink.

01.00 Governand 03.00 Financial N 04.00 Utilization 05.00 Clinical Ca 06.00 Customer 07.00 Information	e lanagement Management re Services Services I Services	02.00 Recipient Rights		×		
Search Search	itle hyperlink	Search Policies				
Title 🗸	here	20 Results ordered by title Preview	Area	Last Revised	Last Approved	Effective Date
02-01 Protection of Recipient Rights	PROTECTION OF RECIF employees/contractors sh with the Mental Health	PIENT RIGHTS 1. The LifeWays Board and its all protect the rights of recipients of services in compliance	02.00 Recipient Rights	02/2019	02/2019	2/1/2019
02-01.01 Protection of Recipients of Lifeways Services	PURPOSE To ensure the with all Laws, Rules, Police	protection of the rights of recipients of service in compliance cles and Guidelines. DEFINITIONS Recipient Rights Officer	02.00 Recipient	02/2019	02/2019	2/7/2019
			ragino			(?) Hel

Note: If the selected Area is the wrong Area, double click the Area title in the **Selected** Box. This will move it at the bottom of this **Available** list.

Search By Area 🛽 🍤	
Filter	
Double click areas to limit your search to policies in those areas.	
Areas:	
Available: Selected:	
13.00 Access Services 14.00 Crisis Services 15.00 Integrated Care Services 16.00 Outpatient Services Implementations 02.00 Recipient Rights	
Search	
Search	
Search Policies	

# Policy Owner Search

1) To search by Policy Owner, click the Owner Tab.

Home	Q Title	Q Area	Q Owner	Q Audience	Admin	
	Owner					
	Tab			Sear	ch By Owr	ier 🛚 🌜
		Filter				
		Double click ow	ners to limit your sea	arch to policies owne	d by those owners.	
		Owners				
		Available:			Selecte	d:
		Cascaddan, K Clevenger, Sh Costa, Gina Cupp, Michael Evans, Randy Hodge, Amon	aren annan		×	* *
		Filter				

 To search using the filter box, double click the Owner name in the Available box, to move it to the Selected box. (Multiple names can be moved between the two boxes). Once the name shows in the Selected box. To narrow the search, type key words in the text box, (this is optional). Then click Search Policies button to view policies and procedures.

	Search By Owner 💊	
Filter		
Double click owners to limit your search to	policies owned by those owners.	
Owners		
Available:	Selected:	
Cascaddan, Karen Clevenger, Shannan Costa, Gina Evans, Randy Hodge, Amon Keyes, Cindy	Cupp, Michael	•
	Key words text box	
Search		
Search		
	Search Policies	

#### 2) To view the desired procedure, click on the Title hyperlink.

Browse Owners							
AII   C   E   H   K   L   M   S   W							
73 Results ordered by owner							
	Title	Preview	Owner 🗸	Area	Last Revised	Last Approved	Effective Date
Edit	01-01 Authority, Structure, Board Organization and Responsibility	PURPOSE To establish the guidelines of authority by which the Board of Directors of a Community Mental Health Authority functions. DEFINITION Community Mental Health Services	Cascaddan, Karen: Executive Director, Governance	01.00 Governance	01/2019	01/2019	1/16/2019
Edit	01-01.01 Board of Directors Authority	PURPOSE To outline the authority by which the Board of Directors exercises effective policy control of LifeWays, and to form a sound basis for the	Cascaddan, Karen: Executive Director, Governance	01.00 Governance	01/2018	01/2019	1/16/2019
Edit	01-01.02 Board of Directors Membership	MEMBERSHIP 1. The LifeWays Board shall maintain a strong and diverse Membership, representing the needs of Jackson and Hillsdale counties. 2. The Board, through the	Cascaddan, Karen: Executive Director, Governance	01.00 Governance	01/2019	01/2019	1/16/2019