

Tables

If you use the Institutional Handbook of Operating Procedures (IHOP) template, you are using a table format. Working with tables keeps each section of the document within borders and creates a better spatially defined document. For example:

The table borders should be “no borders” so that when you print the document, the lines are invisible:

The IHOP template no longer has a category for introduction or audience. Aspects of these categories are incorporated into the policy statement. For example:

Policy	It is the obligation of all UTMB personnel to report suspected violations of applicable laws and regulations. UTMB is committed to full compliance with the laws and regulations.....
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To begin the creation of a policy, decide how many sections the policy will have. The sections most commonly used are:

- Definitions
- Policy
- Exemptions
- Procedure
- Responsibilities
- References

It is also recommended to keep policies specific to an overview with details available by hyperlink. (building a hyperlink or hotlink is described in another section).

The actual IHOP template follows:

UTMB HANDBOOK of OPERATING PROCEDURES

Section X	Policy Section	00/00/00	-Originated
Subject X.X	Policy Subsection		-Reviewed w/ changes
			-Reviewed w/o changes
Policy X.X.X Policy Title			
Title of Policy (18 Bold Font)			
Definitions	<hr/>		
Policy	<hr/>		
Exemptions	<hr/>		
Responsibilities	<hr/>		
References	<hr/>		
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Using WebDav

When you have created the policies that you want to populate into the Stellent folder for your department, open the WebDav icon. Open the drive in which you have the files you are moving to the Stellent policy section. Going to the views tab on the tool bar select details. This will list all of the files so that you can more easily highlight them to drag into the appropriate WebDav folder. WebDav is a tool for quickly importing multiple files. It can be used for moving one file as well, but its true function is for moving multiple files.

Do not use WebDav as an environment to modify a document. Think of it only as a transfer medium, an elevator to move policies into Stellent.

Modifying a Policy – Major Changes within Existing Policy that does not require a name change of the policy.

If the policy is already on the web, i.e., in Stellent, and the changes are greater than deleting a sentence, adding a sentence or paragraph, changing the name of a department, etc. it is better to re-write the policy as a new word document in Word. Once the new document is complete, hit select all and copy. Open the policy in the staging section of Stellent and delete the entire body of the policy. Paste the copied new policy into the existing policy shell of the old policy. The advantage of doing this is to not lose your “history” of prior edits and to not create a new URL address for the policy. (note: doing a major change this way will keep any hotlink from another policy to this policy from becoming inactive).

Deleting a Policy – if you are deleting a policy, you will also delete its history. This can present problems for any research as to what was the governing policy during a particular period of time. Before deleting a policy, make sure that you open the document in staging and click on the information icon  in the Actions column. This will open up the metadata screen. If the policy has had multiple revisions, each revision will be logged at the page bottom. Before deleting a policy make sure you have saved a version of each revision into a file outside of Stellent (hint: use a memory stick specific for policies). Remember, once deleted, all history is gone forever.


Search

On the UTMB homepage <http://intranet.utmb.edu/>, on the left side of your screen is a gray column



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Click on the line Policies and Procedures, this will take you to the IHOP home page. Once on the IHOP home page, you can navigate to all on line policies.

You can search for a policy using either the complete title or any word that is contained in the policy. The example below is for a search of all policies searching within the complete text of the policy. The search engine will “read” every document and list all

Search Criteria:

* Leaving All Checkboxes blank (or checking all checkboxes) will perform a systemwide search.

Full Text Title

documents in which the word appears. Example if you are looking for a policy about chicken pox, it is advisable to only enter the word chicken in the search window in the event that the policy contains chicken pox and not chickenpox. You can also limit your search by selecting particular department policies.

- Institutional Handbook of Operating Procedures
- Health Information Management
- Information Services
- Pharmacy
- TDCJ
- Care Management
- Healthcare Epidemiology
- Nursing
- Rehabilitation
- UTMB Clinics
- Pathology
- Physical Therapy
- Admitting
- Dietary

Table of Contents

Everytime a policy is added, Stellent will automatically reflect the policy, however, many departments have selected to create a personalized Table of Contents (TOC) which allows you to hot link directly to the policy from the TOC. If you choose to do this, you must remember to manually add any new policies when one is added and to manually create the HOTLINK. Additionally, you will need to delete policies from the TOC. A TOC is created similarly to that of a policy. Build the document in word creating hotlinks as you add policies to the list.