**PERTH AND SMITHS FALLS DISTRICT HOSPITAL**

**POLICY AND PROCEDURE**

 **TITLE: How to Edit, Review and Approve Existing Documents in Medworxx Policy**

 **Document System**

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**Purpose:**

This document outlines the process and necessary steps for editing a document that is in the Medworxx Policy and Document Management System.

**Procedure:**

1. Navigate to the **Content Menu** and select **Content List**.
2. Search for the item that you want to edit. Once it is located, right click on it and choose AUTHORING and CHECK OUT & EDIT.
3. The CONTENT screen will display with the FILE tab displayed. If you want to make changes to the uploaded file, click on OPEN icon to open the file. The document should open in the format to which it was created.
4. Once the document has been edited/revised, save the document to your temporary folder on your computer.
5. Click on the Browse icon to locate and select the revised document. A green dot will appear to the left of the file name when upload is complete. Click on the Upload icon to replace the original file with the revised document.
6. Click on the Workflow tab, verify that the information is correct. Enter the new review date. Note: You will need to select the Default Workflow to force the document through the review and approval process.
7. Save. Navigate to **Content List**. Locate your document. Right click on it and choose AUTHORING and CHECK IN.
8. Once the document has been checked in, it needs to be sent for review. Right click and select WORKFLOW > MOVE TO: REVIEW.
9. At this point, documents may be printed and provided to front line staff for review and input, if they do not have access to the PDMS system. For those that have access, a notification email is sent and a task is added to “My Workflow Task” list on the Content List.

To perform the assigned workflow task, right click on the item in the “My Workflow Task” and choose WORKFLOW > VIEW.

1. The first tab that opens is the FILE tab. To open the file in its original format, click on the OPEN button to view the file. Review the file and close it when finished.
2. Click on the Next button to advance through the tabs and verify the information on the details, security and workflow tabs. Revision notes and comments may be added. Once verification is complete, the document may be accepted or rejected. If accepted is selected, the document will automatically move to the next step in the workflow (approval)

**References:**

Medworxx PSFDH Content Managers Policy Training Guide 2016