Alabama Department of Public Health (ADPH)
Public Health Accreditation Board (PHAB)

Document Management System (DMS) Instructions for Domain Leads

Overview

The DMS is a tool to facilitate and track the review and selection of accreditation documentation for ADPH. Selected documentation will be submitted to PHAB as part of the department's state level public health accreditation application.

The Lotus Notes TeamRoom application was customized to function as the department's DMS. TeamRoom is an application to support processes that help people work together. Users of the DMS are the Domain Leads, the Document Review Panel (DRP) Leads, and the Deputy Director of Program Operations (DDPO). Staff in the Office of Performance Management (OPM) function as the system administrators. The Bureau of Information Technology provides technical assistance, when needed.

Accessing the DMS

A link to the production database of the DMS will be forwarded to system users by the OPM staff upon request.

Selecting and Preparing a Documentation Example

1. **Select the Example:** Work with the Domain Workgroup to identify the most direct and applicable documentation example available to meet a documentation requirement. The best documentation example is relevant to the applicable Domain, Standard, and Measure and specific to the "required documentation" and "guidance" in the PHAB Standards and Measures Version 1.5.

   The *PHAB Document Assessment Check Sheet* is a useful tool to help select and prepare the best documentation examples. The check sheet and other helpful information about documentation selection and preparation are available in the PHAB Workgroup Resources category of the Document Library.

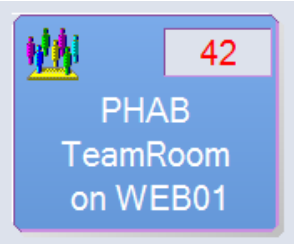
2. **Name and Save the Example File(s):** Name and save each file that is part of the example. Begin the file name with the applicable Domain Number, Standard Number, Measure Number, Required Documentation Number, and Example Number separated by periods (.). Follow the numbers with a dash (-) and a descriptive name. Save the file using a file format accepted by PHAB. *Example: 9.2.2.1.1-Administrative QI Project.pdf.*

   Information about acceptable file formats is available in the PHAB Workgroup Resources category of the Document Library.

3. **Complete, Name and Save the Documentation Example Cover Sheet:** Complete one Cover Sheet for each documentation example. One example may contain multiple files. The Cover Sheet is available in the PHAB Workgroup Resources category of the Document Library.

    a. Rename and save the Cover Sheet. Begin the file name with the applicable Domain Number, Standard Number, Measure Number, Required Documentation Number, and Example Number separated by periods (.). Follow the numbers with a dash (-) and the words "Cover Sheet". *Example: 9.2.2.1.1-Cover Sheet.docx*

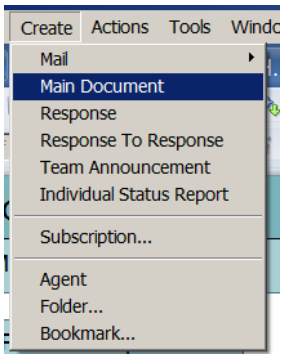
Submitting the Example to the DRP



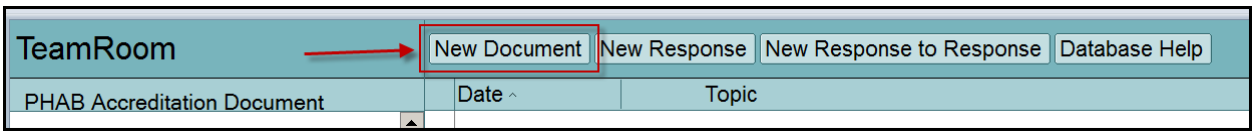
1. **Open the DMS Application:** From the Lotus Notes Workspace, click on the PHAB TeamRoom icon to open the DMS application.

2. **Create a Main Document and Attach Files:**

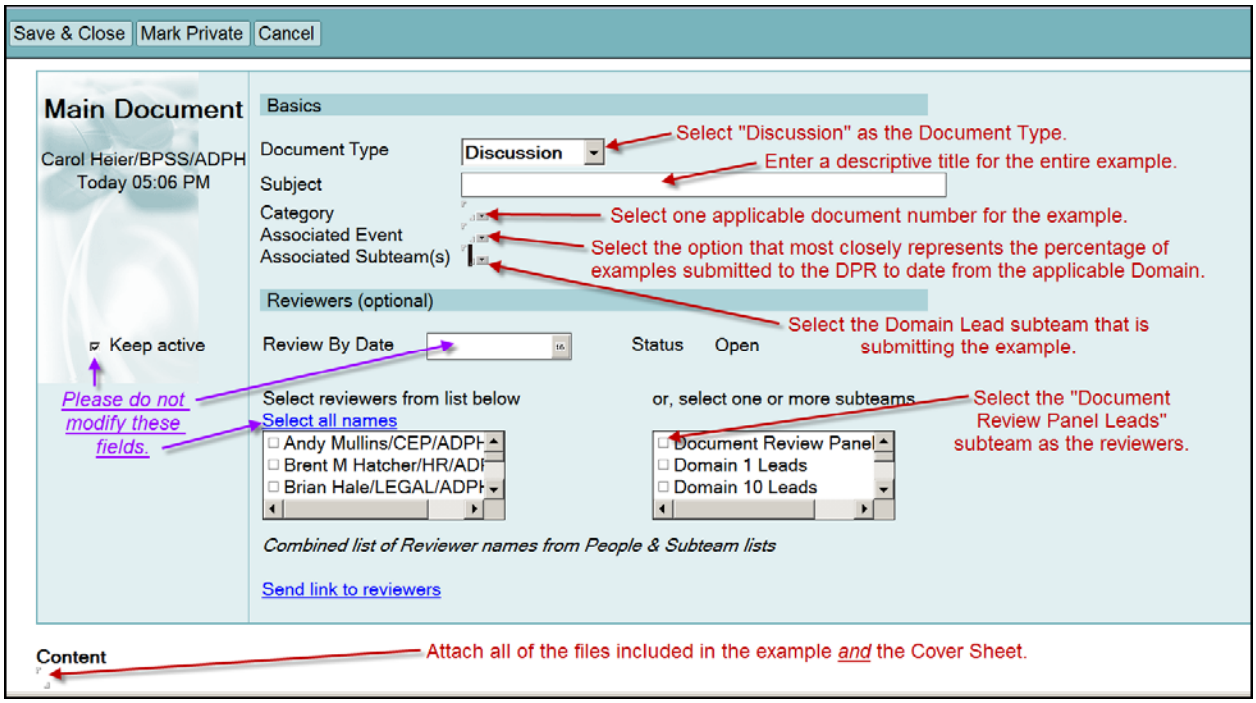
    a. In the menu bar of the DMS application, select "CREATE" and "MAIN DOCUMENT". A document like the one below will be created.



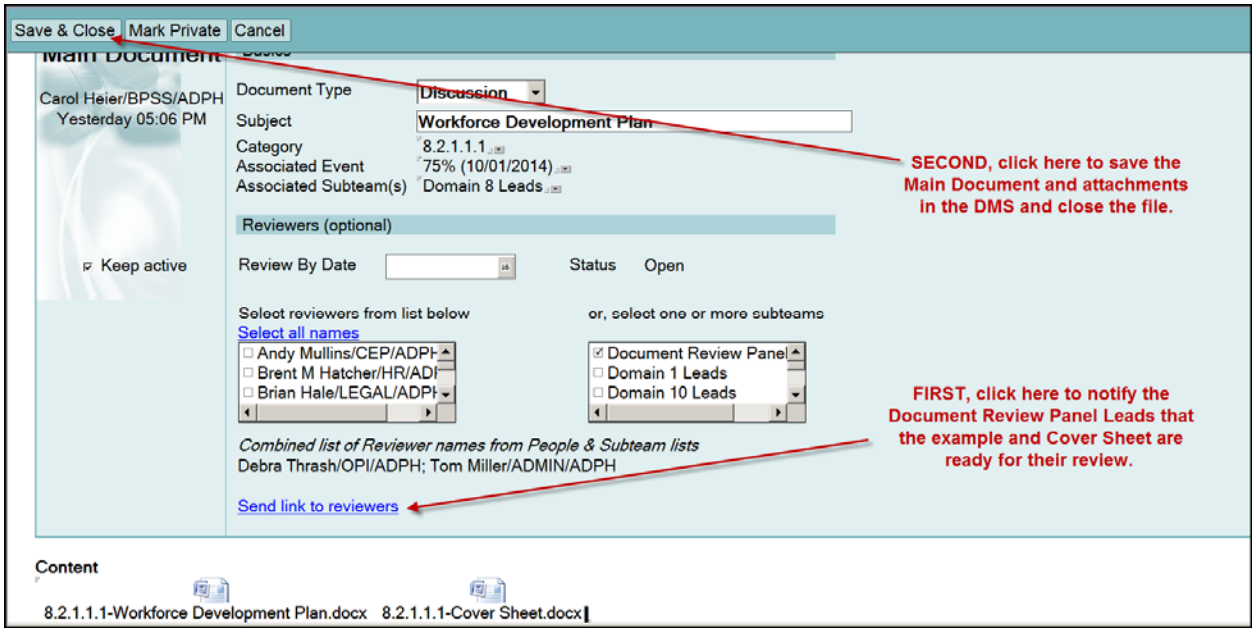
An alternate way to create a main document is to click on the "New Document" button.



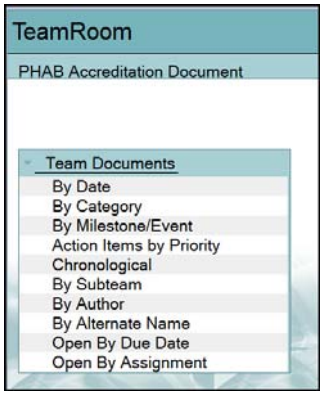
    b. Follow the guidance below to identify the example in the DMS and to add the example files and Cover Sheet to the Main Document.



3. **Notify the DRP:**
   a. Follow the guidance below to notify the DRP Leads that the documentation example and Cover Sheet are ready for review and to save the Main Document and attached files in the DMS.



Review by the DRP



The associated Domain subteam (Domain Leads) can track the DRP review process and view responses by selecting various views in the DMS navigation pane and monitoring the "document type" designation. Further information is below regarding the document types used in the DMS.

1. The DRP Leads will change the document type of the Main Document from "Discussion" to "Action Item" while members of the DRP review the example and Cover Sheet.

2. After the review, the DRP Leads will change the document type of the Main Document to "Returned" or "Approved". They will generate a "New Response" to the Main Document in the DMS to provide feedback to the associated Domain subteam.

    a. A document type of "Approved" means that the DRP has no questions or recommendations regarding the document example or Cover Sheet based on their review.

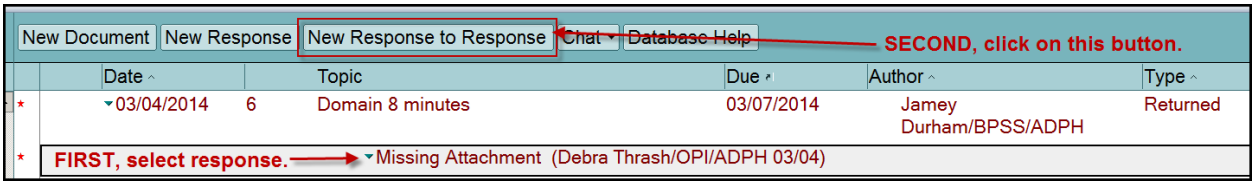
    b. A document type of "Returned" will likely require some modifications to the example and/or the Cover Sheet by the associated Domain subteam.

        i. Corrected files should be added to the original Main Document by the Domain Leads. Add text in the "Content" section of the Main Document to identify the files that were updated.

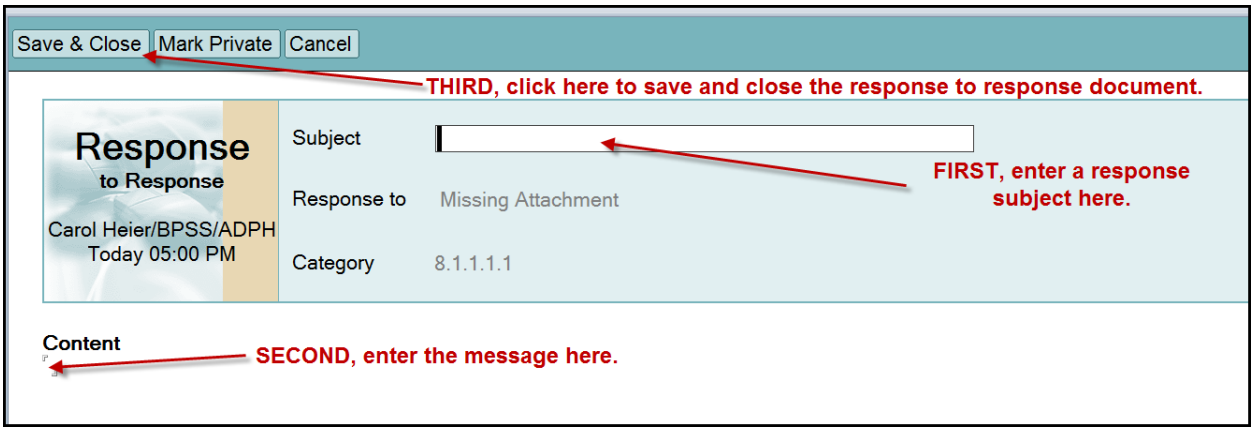
        NOTE: *Please do not delete any of the files attached to a Main Document that has been submitted to the DRP. These files are needed for historical and tracking purposes.*

        ii. The Domain Leads will generate a "New Response to Response" in the DMS to notify the DRP that the corrected example and/or Cover Sheet are ready for another review or to answer a question from the DRP.

        To generate a "New Response to Response" open the response or select it in a view. Click on the "New Response to Response" button. A "New Response to Response" document will be generated.



Follow the guidance below to complete and save the new response to response in the DMS.



iii. The DRP will repeat the review process beginning with Step 1 until the document type can be changed to "Approved" or it is changed to "Removed".

3. The associated Domain Leads will be asked by the Accreditation Coordinator (AC) to submit a measure narrative when all of the required documentation examples for the Measure have the document type of "Approved".

4. The DDPO and the AC will review the Measure documentation examples, Cover Sheets, and narrative for final approval.

    a. The DDPO or the AC will change the document type to "Selected" to indicate that an example will be submitted to PHAB with the department's accreditation application.

    b. The DDPO or the AC will change the document type to "Removed" to indicate that an example will not be submitted to PHAB with the department's accreditation application and another example is needed from the associated Domain subteam.

    c. The DDPO or the AC will generate a "New Response" to the Main Document in the DMS to provide feedback regarding these decisions.

5. **Removing an Example from Consideration:** The associated Domain subteam may generate a "New Response" to the Main Document in the DMS to ask that a submitted documentation example be removed from consideration. This request can be made at any point in the review process. The DRP Leads or the OPM staff will change the document type to "Removed" and will generate a "New Response to Response" in the

DMS to provide follow-up/feedback. The Main Document and all attachments will be retained in the DMS for tracking purposes and/or reconsideration at a later time.

Document Types

1. **Discussion:** Domain Leads use this document type to indicate that a documentation example and Cover Sheet have been added to the DMS and are ready for review by the DRP.

2. **Action Item:** The DRP Leads use this document type. After the Domain Leads submit a document to the DRP for review, the DRP Leads change the document type from "Discussion" to "Action Item" and notifies the DRP that documents are ready for review. The document type will remain an "Action Item" until the DRP decides whether to return the documents to the Domain for clarification/correction or to approve the documents.

3. **Returned:** The DRP Leads use this document type. The DRP Leads will change the document type to "Returned," if the DRP determines that the example and/or Cover Sheet need additional information or clarification to meet the standards and measures. The DRP Leads will also communicate the need for additional information to the associated Domain Leads.

4. **Approved:** The DRP Leads use this document type. If the DRP determines the documentation example meets the standards and measures and information on the Cover Sheet is clear and complete, the DRP Leads will change the document type to "Approved" and notify the associated Domain Leads of the status.

5. **Removed:** The DRP Leads and staff of the OPM, including the AC, use this document type. It is used when Domain Leads request that examples previously submitted be removed from consideration. The DDPO and AC will select this document type when approved documentation examples are not selected for submission to PHAB. Choosing the document type as "removed" allows the example and Cover Sheet to be recalled later if there is an appropriate use for them elsewhere or the removal needs to be reconsidered.

6. **Selected:** The DDPO and AC use this document type. If a document type is marked as "selected," the DDPO and the AC have approved the example for submission into e-PHAB with the department's accreditation application.

Domain:	Choose	Standard:	Choose	Measure:	Choose

Required Documentation	Choose	Example Number	Choose	Total Number of Examples Required for the Measure:	Choose

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Documentation Example Cover Sheet[1]

Contact Person Name:	Click here to enter contact name.	Contact Telephone Number(s):	Click here to enter contact telephone numbers.

FILES ASSOCIATED WITH THE COVER SHEET

Example:

File Name[2]	Document Title[3]	Document Description[4]
4.2.1.1.1-Coalition Minutes.pdf	*Obesity Coalition Minutes*	*The Coalition minutes are provided by the Hospital Representative. See page 2 for the strategies of the coalition. See the highlighted sections on pages 3 and 4 for Health Department involvement.*

File Name	Document Title	Document Description

[1] Complete one Cover Sheet for each documentation example. One example may contain multiple files.

[2] Enter the name of each file included in the example. The file name should begin with the applicable Domain.Standard.Measure.Required Documentation.Example Number and be followed by a descriptive name. Include the file extension in the file name.

[3] Include a title for each file. Use up to 250 characters. Be concise and descriptive. Use letters, numbers, and spaces only - no underscores, dashes, commas, or other special characters. Example: Flu Press Release

[4] Include a description for each file. Use up to 150 words. Enter a concise description of how the example demonstrates conformity with the Required Documentation. Be specific to the exact elements(s) of the documentation that demonstrate conformity and the exact location of the element(s). If the documentation is part of a larger document, name or describe the larger document. If the document is not authored by the health department, name or describe the author and the relationship of the author to the health department (i.e., contractor, partner, organization, etc.)

Alabama Department of Public Health
Public Health Accreditation Board (PHAB)
Accreditation Workgroup Roster
Updated March 25, 2014

State Health Officer: Donald E. Williamson, MD
Deputy Director of Program Operations: Michele Jones
Accreditation Coordinator: Carol Heier
PHAB Accreditation Workgroups

Domain 1 – Conduct Assessment Activities

Leads: Dale Quinney
Stacey Adams
Michelle Jones

Workgroup:

Albert Woolbright	Krishona Lee
Carrie Shepherd	Renae Carpenter
Chris Haag	Ricky Elliott
Chris Sellers	Sherri L Davidson
Janice Cook	Sondra Reese
Jim McVay	Tammie Yeldell
Justin T George	William Duncan

Domain 2 Leads – Investigate Health Problems

Leads: Mary McIntyre, MD
Sherry Bradley

Workgroup:

Charlene Thomas	Teresa Porter
Dennis Blair	Tim Hatch
Jackie Holliday	Tina Pippin
John Guarisco	Ron Dawsey
Leigh Salter	

Domain 3 Leads – Inform and Educate about Public Health

Leads: Jim McVay, DrPA
Sally Palmer

Workgroup:

Arrol Sheehan	Michael Smith
Blu Gilliand	Richard Burleson
Jennifer Sumner	Takenya Taylor
Jonathan Edwards	

Domain 4 Leads – Engage with the Public to Solve Public Health Problems

Leads: Chris Haag
Jim McVay, DrPA

Workgroup:

Bob Hinds	Mary Gomillion
Dawn Ellis	Molly Killman
Dena Donovan	Pam Williams
Gloria Boyd	Tim Hatch
Ken Reid	Viki Brant

Domain 5 Leads – Develop Public Health Policies and Plans

Leads: Andy Mullins
Carolyn Bern
Michele Jones
Valerie Cochran

Workgroup:

Cindy Ashley	Jane Reeves
Diane Beeson	Mary McIntyre
Dianne Sims	Teela Carmack
Jamey Durham	

Domain 6 Leads – Enforce Public Health Laws and Regulations

Leads: Brian Hale
Walter Geary, MD

Workgroup:

Charlie Thomas	Mia Sadler
James (Nate) Horsley	Pat Ivie
Karen Landers, MD	Phyllis Mardis
Mark Sestak	

Domain 7 Leads – Promote Strategies to Improve Access

Leads: Cathy Caldwell
Jamey Durham
Viki Brant

Workgroup:

Carolyn Bern	Renae Carpenter
Chris Sellers	Ricky Elliot
Dana Driscoll	Walter Geary, MD
Julia Sosa	

Domain 8 Leads – Maintain a Competent Workforce

Leads: Brent Hatcher
Jamey Durham

Workgroup:

Alice Floyd	Linda Hines
Ann Brantley	Renae Carpenter
John Hankins	Trina Parker
Jora White	

Domain 9 Leads – Evaluate and Continuously Improve

Leads: Carol Heier
Mary McIntyre, MD

Workgroup:

Agnes Oberkor	Chris Sellers
Albert Woolbright	Nancy Wright
Annie Vosel	Patronya Sanks
Bernard Linzy	Ron Dawsey
Charlene Thomas	Stacey Neumann

Domain 10 Leads – Contribute to and Apply the Evidence Base for Public Health

Leads: Carol Mysinger
Valerie Cochran

Workgroup:

Agnes Oberkor	Melanie Rightmyer
Debra Hodges	Renae Carpenter
John Hankins	Sondra Reese
Laurie Stout	Tracey England
Marilyn Knight	

Domain 11 Leads – Governance

Lead: Jeffrey Wright

Workgroup:

Joseph Osenton	Samarria Dunson
Julia Sosa	Victor Hunt
Lisa Jones	

Domain 12 Leads – Administration

Leads: Michele Jones
Pat Ivie

Workgroup:

Arrol Sheehan	Jim McVay
Brian Hale	Pam Moody
Chris Haag	Teela Carmack
Grover Wedgeworth	Wendy Dale
James Martin	

<u>Document Review Panel:</u>

Leads: Debra Thrash
Thomas M. Miller, MD

Panel:

Becky Leavins	Sherry Bradley
Harrison Wallace	Teela Carmack
Janice Cook	Valerie Cochran

<u>Accreditation Champions:</u>

Lead: Carol Heier

Workgroup:

Arrol Sheehan	Chris Hall
Blu Gilliand	Michael Smith
Charles Crawford	Patronya Sanks

<u>Office of Performance Management Staff:</u> Patronya Sanks