

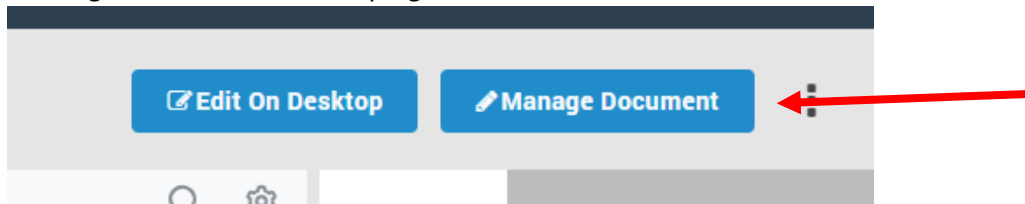
## PowerDMS administrative policy approval workflows Instructions

Ramsey County utilizes workflows within PowerDMS to initiate and route the review and approval for all administrative policies including:

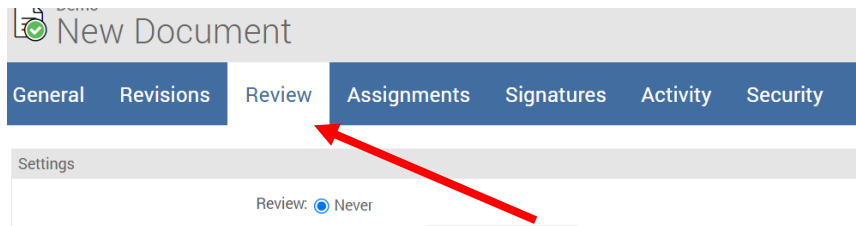
- Major policy updates which substantially change the content of the policy and/or processes relating to the policy content.
- Minor policy updates which do not substantially change the policy and are generally technical revisions.
- New policy which the county has not previously had or a policy that replaces another policy that needs to be retired.

### Steps to initiate the workflows

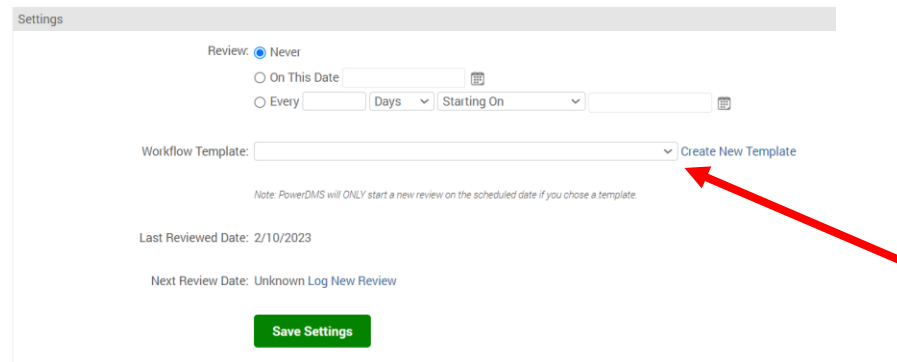
1. After making the redlined updates or loading the new policy drafts into PowerDMS, click “Manage Document” at the top right side of the screen.



2. Click “Review.”



3. Scroll down and under setting click on the arrow tab for workflow template.



4. Workflow titles

- Major policy updates and new policies use the workflow named “Final Review and Approval for New Countywide Policies and Major Updates.”

- Minor policy updates use the workflow named “Minor Revisions of Countywide Policy.”

Click the appropriate workflow title.

Settings

General Revisions Review Assignments Signatures Activity Security

Review:  Never  
 On This Date   
 Every  Days  Starting On

Workflow Template:  Create New Template

- CC Admin Dept
- Demo practice
- Final Review and Approval for New County Wide Policies or Major Updates
- Minor revisions of County Wide Policy

Last Reviewed Date:

Next Review Date: Unknown Log New Review

Save Settings

5. Click “Save Settings.”

Settings

Review:  Never  
 On This Date   
 Every  Days  Starting On

Workflow Template:  Create New Template

Note: PowerDMS will ONLY start a new review on the scheduled date if you chose a template.

Last Reviewed Date: 2/10/2023

Next Review Date: Unknown Log New Review

Save Settings

6. Notifications:

Once the settings have been saved the workflow will initiate. PowerDMS will automatically send notifications to this schedule:

- Every 15 days when their inbox is not empty.
- Every 3 days within 7 days of an item being due or expired.
- Daily when there is an overdue item in their inbox.

To expedite the completion of the workflow, you may consider emailing [admin.policies@co.ramsey.mn.us](mailto:admin.policies@co.ramsey.mn.us).