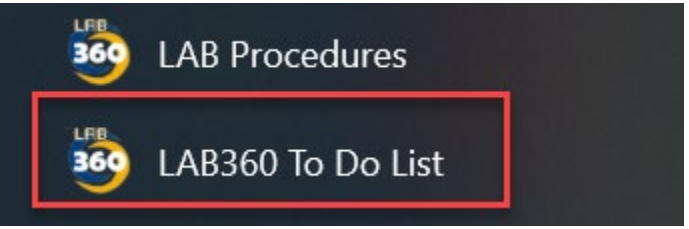


Lab360 Collaboration Tips

Effective strategies for successful teamwork and communication

Your Roadmap to Success!

- The Basics
- How the review process works
- How to do a quick review
- More In Depth File Edit Review
- Tips and Tricks
- How to finalize and submit

Lab360 Collaboration

Why is it important?

Insight into real-world workflows, ensuring procedures are not just theoretically correct, but practically executable.

Collaborative review helps align procedures with regulatory standards (CAP, CLIA, CLSI) and organizational policies. End-user feedback often identifies gaps that could lead to non-compliance or preanalytical errors.

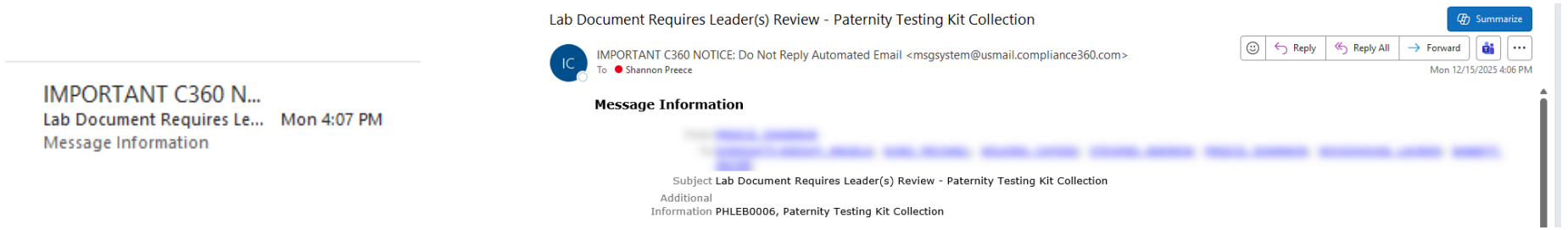
Collaboration prevents delays by catching issues early. For example, coordinated editing sessions and clear communication loops ensure smooth progression from draft to approval, avoiding bottlenecks in implementation.

Procedures developed with end-user input serve as better training tools because they reflect actual practice. This supports onboarding and continuous education, reducing variability in performance.

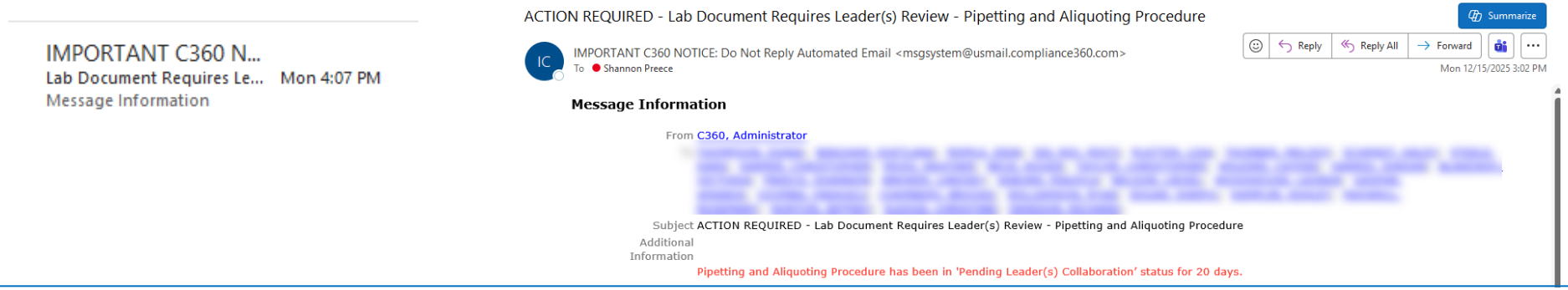
Involved end users have a sense of ownership, which improves adherence to protocols. When staff feel their voice matters, they are more likely to follow procedures consistently and advocate for quality improvements.

How will I know that I have been assigned to collaborate?

- You will receive an email from C360 informing you about a procedure that requires your collaboration.
- From first notification, you have **30 calendar days** to complete your collaboration.



- If the procedure isn't marked **Leader(s) Review Complete** within 20 days, you'll get a second email reminder and have 10 days left to review.



What if I am not the best person from my campus to collaborate?

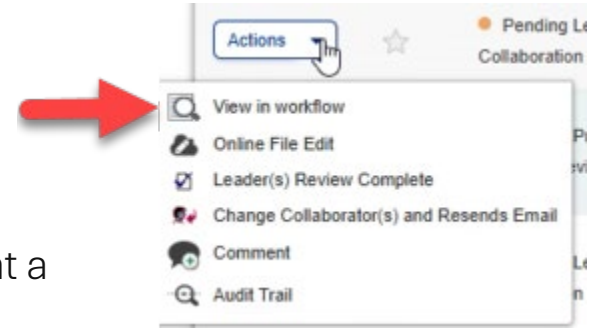
- Reach out to the person who sent you the collaboration request and let them know who from your campus would be a better option.
  - Do not just ignore the request.
- Active collaboration from every campus is required by our Medical Directors.

Collaboration Basics

There are <u>TWO different</u> ways to perform procedure collaboration that will be highlighted.

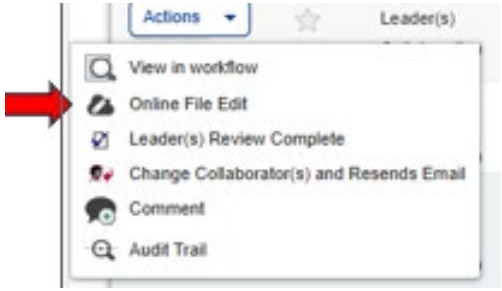
1

- <u>View in Workflow</u>
  - *Preferred starting point for procedure review.*
  - Does not lock collaboration, more than one person can be in view workflow at a time.



2

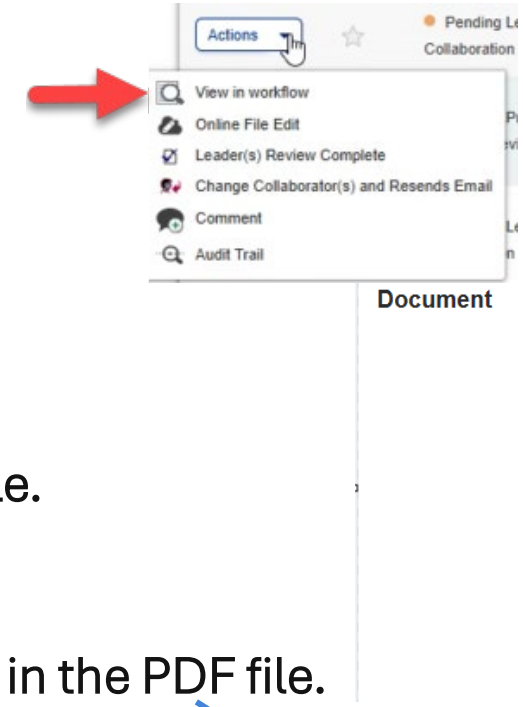
- <u>Online File Edit</u>
  - Use this detailed process when adding comments or questions.
  - Does lock the procedure from other collaborators.
  - Can only be functionally reviewed for 4 hours per a session.



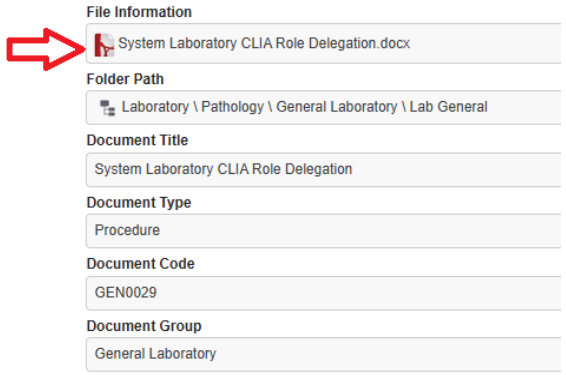
1 View in Workflow

- This method allows you to review the PDF of a procedure with proposed changes and comments that have been added via Online File Edit.

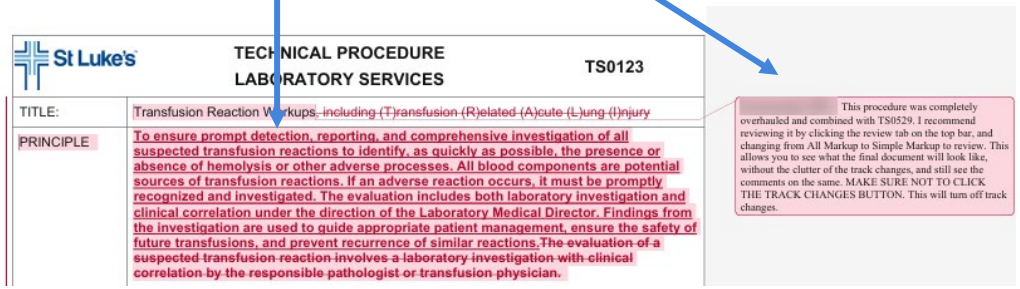
- STEP 1: **Click on View in workflow**



Step 2: **Click on the PDF icon** **next to the title.**



STEP 3: **Review changes and comments visible in the PDF file.**

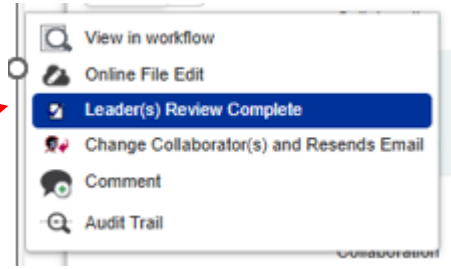


View in Workflow- Continued

- Step 4: **At this point there are two options.**

Option 1: You have no questions or collaborative comments to make and are ready to complete the process.

- Close PDF File, taking you to the Document Page.
- Press blue Close in upper right corner.
- Open Actions again and select “Leader Review Complete”



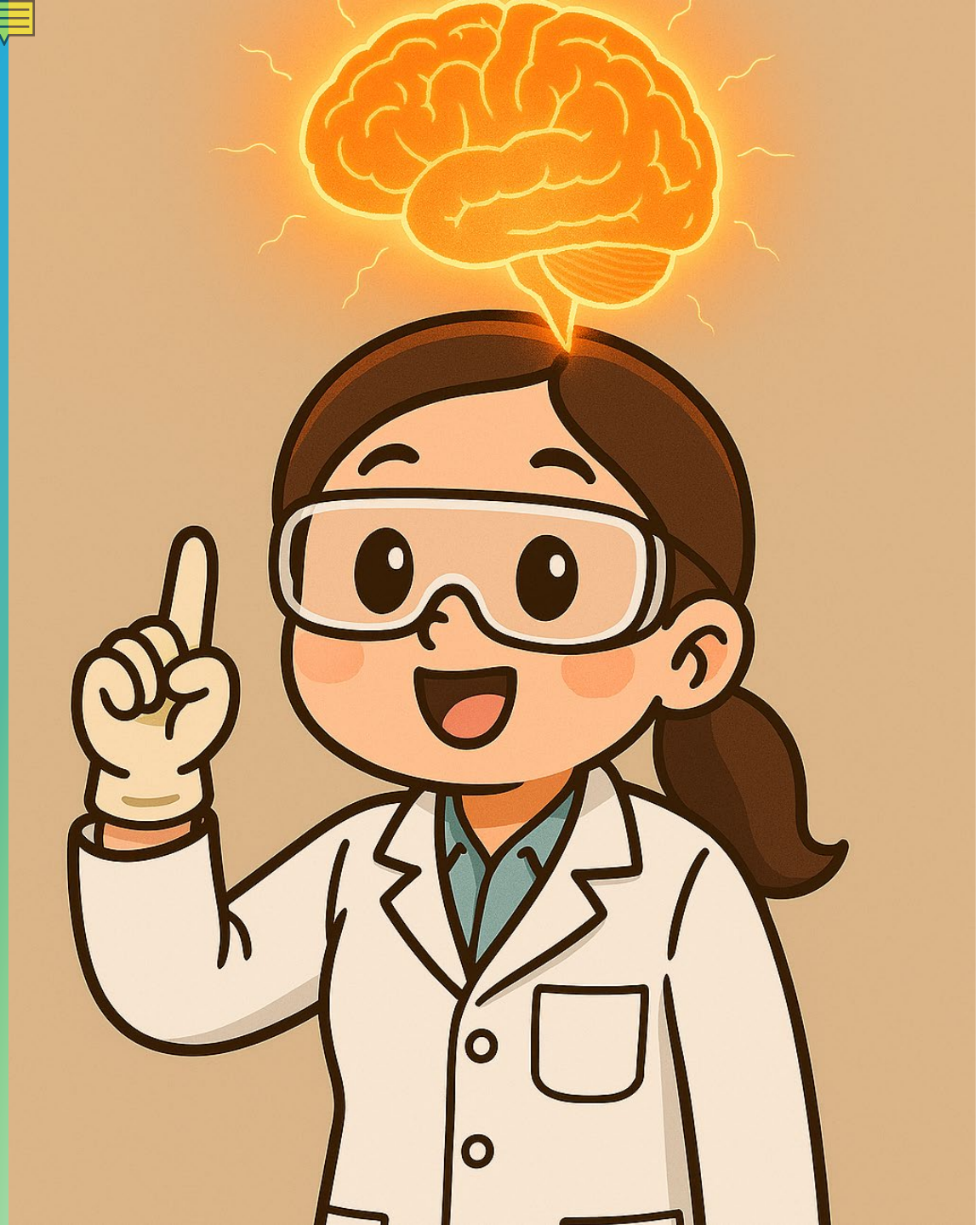
You have now completed and documented your collaboration.

The procedure will no longer be visible on your Collaboration Dashboard.

If you determine you need to access the file again before it is fully returned to the Program Manager, you need request access from Carie Scott at scottc@slhs.org

Option 2: You have questions or comments you would like to add to the working WORD document.

- Close PDF File, taking you to the Document Page.
- Press blue Close in upper right corner.
- You will now begin the Online File Edit process. (See next Slides)

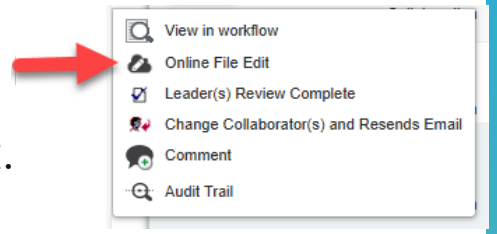


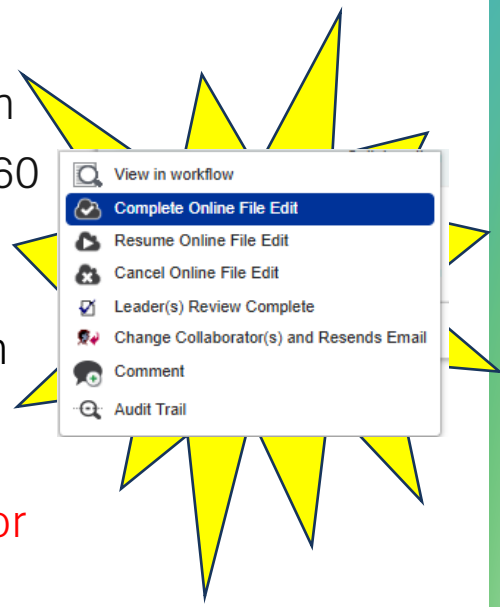
A few tips to remember before starting Online File Edit

2 Online File Edits

- This method allows you to review, add changes, comments or questions directly into the working WORD document.
- STEP 1: Click on Online File Edit from your Actions Tab to open the working WORD document.
- Step 2: Ensure your track changes view is set to your preference per previous instructions.
- STEP 3: Add minor wording changes directly in text or add questions or comments in comments boxes as described.
  - **Remember to manually save your document (File-Save) regularly and before closing.**
- STEP 4: Once you finish collaborating or need to pause, save and close the file by clicking X in top right corner. You will be returned to your To-Do List. (If Lab360 is logged out, restart Lab360 Admin.)
- IMPORTANT STEP 5: Select **Complete Online File Edit** from the Actions menu, even if you plan to come back later to make additional changes.

Note: Changes must be finalized with **Complete Online File Edit** within 4-hours of checkout, or they will not be included in the final document.

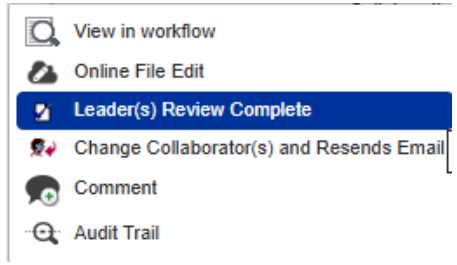




Online File Edits Continued

After Completing Online File Edits, you have two choices

- Option 1: You have completed all your Online File Edits and are ready to submit it back to the Program Manager.
  - From the Actions Button select **Leader(s) Review Complete.** This removes the procedure from your To-Do list and documents your collaboration.
- Option 2: You have not completed your Edits, have outstanding questions and would like to return later.
  - Do not mark the procedure as complete. Close out of your To-Do list. When you are ready to collaborate again, start the Online File Edit process over.



Most Important Take Away

Make sure you have **Completed Online File Edits**

- ❖ Within 4-hours of checking the procedure out.
- ❖ Before pressing **Leader(s) Review Complete.**
- ❖ Before leaving your To-Do list (ensure all file status are at Checked In)

ACTIONS	STATUS	DAYS IN STATUS	FOLDER PATH	DOCUMENT CODE	FILE	TITLE	DOCUMENT GROUP	CONTROL COORDINATOR	LOCATION	RELATED DOCS	EFFECTIVE END DATE	EFFECTIVE START DATE	FILE STATUS	REVISION NUMBER
Actions	Pending Leader(s) Collaboration	28	... \ Pathology \ General Laboratory \ Lab General	GEN0029		System Laboratory CLIA Role Delegation	General Laboratory	JUDY, CARIE R.	Boise, Elmore, Fruitland, Jerome, Magic Valley, McCall, Meridian, Boise Cancer Institute, Nampa, Core Laboratory, Wood River, Histology Denver Way	0	6/14/2025	6/14/2023	Editing Online: PREECE, SHANNON	2
Actions	Pending Leader(s) Collaboration	29	... \ Pathology \ General Laboratory \ Lab General	GEN0003		Corrected Result, Cancel Credit Policy	General Laboratory	JUDY, CARIE R.	Boise, Elmore, Fruitland, Jerome, Magic Valley, McCall, Meridian, Boise Cancer Institute, Nampa, Core Laboratory, Wood River, Histology	1	8/8/2025	8/8/2023	Checked In	2

Responsibilities

PROCEDURE OWNER RESPONSIBILITIES

Procedure Collaboration Timeline

Ensure all sites have a 30-day window for thorough review and collaboration on procedures.

Feedback Evaluation

Carefully assess all feedback to balance practicality, compliance, and clarity in procedural updates.

Regulatory Compliance Reference

Review guidelines from CAP, CLSI, CLIA, and other relevant regulatory agencies to confirm that procedures comply with both industry and regulatory standards.

Final Draft Approval

Prepare final procedure draft and obtain sign-off from all medical directors before implementation.

Documentation of Changes

Create and maintain documentation of all significant changes made during the collaboration process for transparency and audit purposes.

COLLABORATOR RESPONSIBILITIES

Timely and Thoughtful Review

Collaborators must review procedures carefully within set timeframes to ensure compliance and prevent delays.

Use Approved Collaboration Methods

Using approved methods like View in Workflow or Online File Edit prevents document locking and ensures access for all reviewers.

Maintain Standardized Formatting

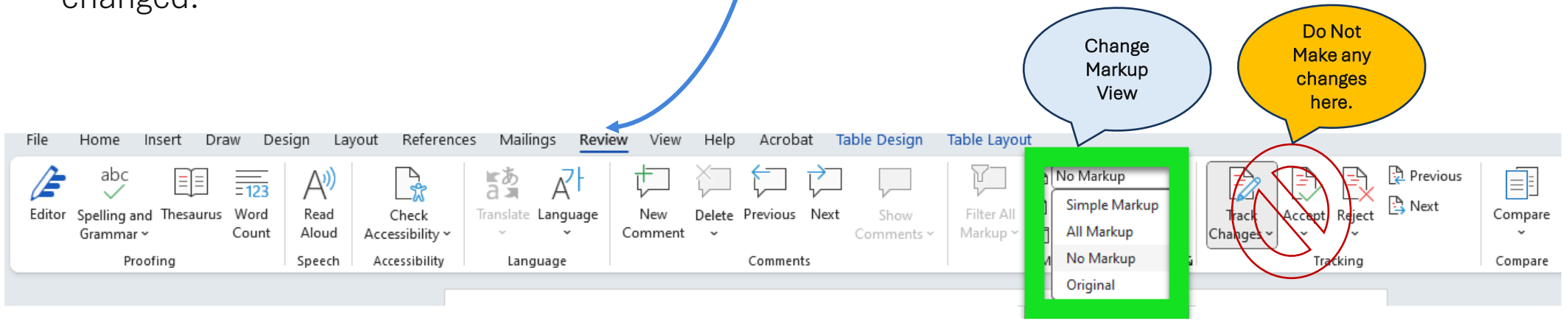
Collaborators must keep the established format to ensure clarity and consistency across all labs and departments.

Escalation for Reformatting Requests

Requests for reformatting require submitting an SBAR, which is reviewed by system leadership for approval.

Online File Edit Tips- Track Changes

- **Track changes** are always on when collaborating in the Word Document
  - Do Not Turn Off Track Changes or Accept or Reject any proposed changes.
  - You can adjust Track Changes to your preferred view for collaboration.
  - Track Change View can be changed in the Review Tab
    - All Markup shows all previous text, new text, formatting changes and comments and can be very busy and difficult to read.
    - Simple Markup shows clean new text with old text hidden. You can tell that changes have been made by the red line to the left of the text and comments are visible. This is usually the preferred method for viewing.
    - No Markup is not suggested as it only shows new proposed text without indication as to what has been changed.



Online File Edit Tips Continued- Time Limit

- Only one person can have a procedure checked out in Online File Edit at a time.
  - You will see *Editing online* and a person's name in the File Status column, and you will not have the Online File Edit option in your actions. You will have to come back later to complete your edits.

ACTIONS	STATUS	DAYS IN STATUS	FOLDER PATH	DOCUMENT CODE	FILE	TITLE	DOCUMENT GROUP	CONTROL COORDINATOR	LOCATION	RELATED DOCS	EFFECTIVE END DATE	EFFECTIVE START DATE	FILE STATUS	REVISION NUMBER
Actions	Pending Leader(s) Collaboration	27	... \ Pathology \ General Laboratory \ Lab General	GEN0029		System Laboratory CLIA Role Delegation	General Laboratory	JUDY, CARIE R.	Boise, Elmore, Fruitland, Jerome, Magic Valley, McCall, Meridian, Boise Cancer Institute, Nampa, Core Laboratory, Wood River, Histology Denver Way	0	6/14/2025	6/14/2023	Editing Online: PREECE, SHANNON	2

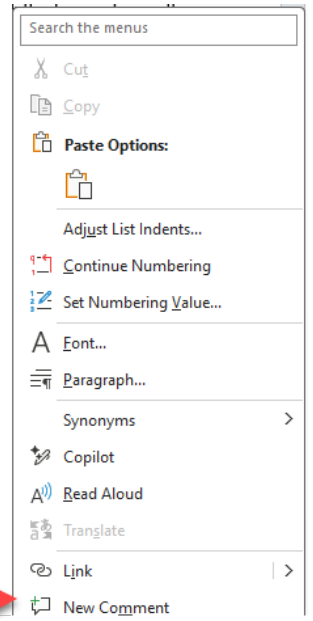
- Online File Edit has a 4-hour limit. File must be marked as **Complete Online File Edit** within that 4-hour window.
  - If a file is not marked as complete within the four-hour timeframe, any modifications (regardless of whether they have been saved) **will not be retained in the final document.**
  - Closing the Word File does not complete online file edits, you must select **Complete Online File Edit** from your actions tab.
- Marking a file as **Complete Online File Edit** does not remove the procedure from your To-Do list, you will be able to go back in and add more edits until the 30-day collaboration period ends or you mark as **Leader Review Complete.**
- Remember to be courteous to other collaborators. If you have a procedure checked out and you cannot finish, save your changes, **Complete Online File Edit ,** and check it out later when you have time to complete your work.
  - By doing this you are eliminating the risk of losing your edits and locking the procedure for other collaborators.

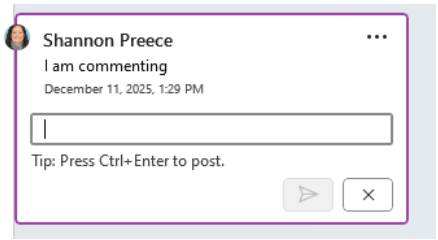
Online File Edit Tips Continued- Adding Changes and Comments

- Making edits/changes within the body of the document.
  - If you need to make minor wording or grammatical changes, they can be made directly in the body of the text. Track changes will record who made the change.
  - If you have major changes or questions, these should be added as a comment.
    - This allows the Program Manager or others to reply to your question or comment.
    - Once discussion is final, the Program Manager will make the appropriate changes to the body of the text.

Adding a Comment

- Verify in the top right corner of the document that you are in Reviewing mode
- If there are any previous comments, you will see them to the right of the text.
- To add a new comment.
  - Find the spot in the text you want to address and right click the mouse.
  - Select New Comment from the bottom of the list.
  - A comment box will appear on the right. Put in your comment or question and push the arrow to post.
  - Any collaborator can add additional comments or answer comment questions by replying to the original comment.





Let’s Wrap Up!

Teamwork is the Dreamwork!

Be Thoughtful

Don’t Use ONLINE FILE EDIT until you’ve reviewed the document and know that you have enough time.

Provide Constructive Feedback

Have a Plan

Make sure you save, and Complete File Edit before you step away from your Online File Edit.

Save your work frequently

Follow the Process

Don’t put in major changes directly into the document.

Ask questions if you’re ever confused!