CHANGE
HEALTHCARE™

TQAD Procedure Checklist

Procedure Title: _____

Editor: _____

Author / SPA: _____   Business Unit: _____

Date of Review: _____

Overview

The TQAD Style Guide is the primary reference source for correctly completing procedure documents. When applicable, hyperlinks are provided below to provide additional information. Also, the procedure overview offers a high-level understanding of the process, and the SPA final edit checklist is a nice review. Access via:

Procedure Overview: https://ops.emdeon.net/display/TQAD/Overview
SPA Final Edit Checklist: https://ops.emdeon.net/display/TQAD/Final+Edit+Checklist

Procedure Title

☐　　The procedure's title is formatted properly.
☐　　Title begins with action (-ing) verb in present tense.
　　　Additional Details: https://ops.emdeon.net/display/TQAD/Procedure+Title

Page Author/Date Details

☐　　SPA name in *Author* field
☐　　If the procedure is a conversion document, the SME name in *Author* field. Include SPA, too.
☐　　Date inserted using the Confluence calendar feature.
☐　　The information table/box is indented once with a blank line above and below the table/box.
　　　Additional Details: https://ops.emdeon.net/pages/viewpage.action?pageId=85636240

Definitions

☐　　Word title in bold. Dash not in bold. The first word of the definition is uppercase. The sentence ends with a period.
☐　　The definitions are listed in alphabetical order.
☐　　All appropriate terms in the body of the procedure are included.
☐　　If the word has an acronym, then it is used in the first reference, before the dash. For example, **Client Access System (CAS)** – XXXXXXXXXXXXXXX.
☐　　All definitions are indented once.
☐　　There is a blank line above the heading and after the last definition.
　　　Additional Details: https://ops.emdeon.net/display/TQAD/Definitions

Impact Statement

☐　　Statement contains an overall definition of the core purpose of the procedure.
☐　　Statement explains the consequences if the analyst does not complete the procedure.
☐　　Be on the lookout for similar procedures. A certain percentage of the other impact statements may be applicable to this procedure, as well.
☐　　Look for single, short sentences. That can be a sign that the statement will probably need to be rewritten.
☐　　Statement is indented once.
☐　　There is a blank line before the heading and after the statement.
　　　Additional Details: https://ops.emdeon.net/display/TQAD/Impact+Statement

Ticket Template

☐　　If procedure requires a team member to transfer an SR to another team member, verify that the procedure has a ticket template.

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- ☐ Ticket template in a box.
- ☐ Ticket template indented once.
- ☐ There is a blank line before the heading and after the template.
- ☐ If no template, N/A needs to be listed…with a blank line above and below it.
  Additional Details: https://ops.emdeon.net/display/TQAD/Ticket+Template

Tools & Applications

- ☐ At a minimum, most procedures will have the following four items listed in a bullet list: Siebel, Email, ON 24/7, and Phone.
- ☐ Any tools and applications unique to the procedure must be added to the list.
- ☐ Bullet list indented once.
- ☐ There is a blank line before the heading and after the end of the bullet list.
  Additional Details: https://ops.emdeon.net/pages/viewpage.action?pageId=85636255

Processing - Spacing

- ☐ All text is indented once to fall directly under the "Processing" word/heading.
- ☐ The first line always uses the following pattern: Use the following steps to XXXXX. For example, Use the following steps to reserve an extra insert form:
- ☐ There is no blank line between the "Processing" heading and the first intro line.
- ☐ There is a blank line between each procedure step.
- ☐ If a procedure step introduces/includes a screen shot, then there is no blank link between that step and the screen shot/image that follows. Indent the image once.
- ☐ Don't use auto numbering. Do the following for numbers 1 – 9: space, the number, a period, two spaces, and then start typing the step. For numbers 10 and above: same approach, but do not use a space at the start.

Processing – First Line & Gliffy Choices

- ☐ Verify that the first line matches the start of the Gliffy/process flow.
- ☐ If the SPA/author proposes that the procedure should not start with the standard first line, verify this decision with leadership and/or another editor.
  Additional Details: https://ops.emdeon.net/pages/viewpage.action?pageId=119932852

Processing – Logging In Standard Verbiage

- ☐ Users access applications either via a Web browser or a desktop application. Each has unique verbiage.
- ☐ For applications, don't assume the reader's desktop is configured the same as your desktop. Give choices when documenting how to access the application.
- ☐ Use as many screen shots as logical & appropriate to guide the user through the access process.
- ☐ When documenting a Web-based application, use the word "page." The Home Page displays.
- ☐ When documenting a Windows application, use the word "screen." The *Password Reset* screen displays.
  Additional Details: https://ops.emdeon.net/display/TQAD/Logging+In+-+Standard+Verbiage

Processing – Word Choice and Emphasis

- ☐ Refer to things on the screen by their correct names: screen, menu names, submenu names, menu commands, drop-down list box, text box, and so on. Refer to the *MS Manual of Style* (located in the SPA Toolbox!) when/as questions arise.
- ☐ If a field name contains a colon, the colon should appear in the field name in the procedure text. Type the field name EXACTLY as it appears in the application. If the field name is uppercase, type it as uppercase. If the field name is misspelled, make the text in the procedure match.
- ☐ There should be two spaces between sentences. Not one.
- ☐ There should not be a comma before the "and" in a list. For example, "I went to the store,

> cleaners, gym and hospital.
> Additional Details: https://ops.emdeon.net/display/TQAD/Word+Choice+and+Emphasis

Processing – Graphics & Screen Shots

- ☐ All screen shots are only as large as necessary for clarity.
- ☐ When showing a full screen, 900-pixel resolution seems to be a nice, standard size.
- ☐ All screen shots contain a border.
- ☐ All screen shots show/illustrate the information referenced in the step introducing the image.
- ☐ If referencing a small part of the screen, especially if the screen is complicated, cut out the area in question and include a verbal navigation queue in the step text, such as: "…the menu-portion of the application, located on the left-hand side of the screen."
  Additional Details: https://ops.emdeon.net/pages/viewpage.action?pageId=84935336

Processing - Labels

- ☐ Verify that each procedure has a label. If no label, add one or more.
- ☐ Additional Details:
  https://ops.emdeon.net/display/TQAD/Labels+-+Adding+to+Procedure+Pages

Processing – Referencing Documents/Procedures

- ☐ Verify SPA/author is using the correct reference verbiage.
- ☐ If there is a Communication or Additional Reference item, then at the appropriate spot in the procedure text, there needs to be a reference—alerting the reader to that fact and referring the reader to the appropriate section within the procedure.
  Additional Details: https://ops.emdeon.net/pages/viewpage.action?pageId=85636968

Processing – Lists & Tables

- ☐ Bullet list represents a series of related items without a sequential order or difference of importance. Verify used correctly.
- ☐ Numbered list denotes sequential items or items ranked in importance. Verify used correctly.
- ☐ All lists use parallel structure.
- ☐ If using a table to define fields, verify that it conforms to the guidelines in the style guide.
  Additional Details: https://ops.emdeon.net/pages/viewpage.action?pageId=85637073

Processing – Notes & Cautions

- ☐ Verify that the note or caution has the appropriate number of indents.
- ☐ Try not to have more than one note or caution appearing one after another. If this is the case, consider combining them.
  Additional Details: https://ops.emdeon.net/display/TQAD/Notes+and+Cautions

Troubleshooting

- ☐ Section has standard help desk contact line/verbiage.
- ☐ If procedure has separate troubleshooting contacts and numbers, verify that this section does not have the standard help desk contact line, as well…unless it is logical to have both.
- ☐ Content is indented once.
- ☐ There is a blank line above the heading and after the last line of information.
- ☐ If this procedure is a logging in document and there is a password reset link, then this section must contain the password reset procedure documentation with all appropriate screen shots.
- ☐ If there are procedure documentation instructions in this section, then that material must comply with all the rules outlined in the Processing section of this document.
- ☐ There should never be an "N/A" in this section of a procedure document.
  Additional Details: https://ops.emdeon.net/display/TQAD/Troubleshooting

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Communication

- ☐ Content is indented once.
- ☐ There is a blank line above the heading and after the last line of information.
- ☐ If the procedure requires a team member to contact the client, then this section MUST have a template of communication to use.
- ☐ Verify the template is in a box.
- ☐ If there is a communication template, then there is an impact to the Gliffy.
- ☐ If there is no communication template, then this section needs "N/A" and there is a blank line above and below the text.

Additional Details: https://ops.emdeon.net/display/TQAD/Communication

Additional Reference

- ☐ Content is indented once.
- ☐ There is a blank line above the heading and after the last line of information.
- ☐ If there is no additional information, then verify that there is an "N/A" and there is a blank line above and below the text.
- ☐ If there are procedure documentation instructions in this section, then that material must comply with all the rules outlined in the Processing section of this document.

Additional Details: https://ops.emdeon.net/display/TQAD/Additional+Reference

Process Flow

- ☐ Sub-processes require double boxes with paperclips linking to the procedure in question.
- ☐ If there is a communication template, verify that the Gliffy has a "Communicate to Client" box, appearing as the next-to-last step in the flow.
- ☐ Verify that the Gliffy starts with the appropriate 100% compliance intro layout pattern.
- ☐ Text in ownership box is bold.
- ☐ Ownership box is shaded, with the lightest shade of gray.
- ☐ Each player identified in the procedure (client, analyst, help desk, etc.) must have a separate swimlane.
- ☐ Do not cross the streams, i.e.: there must be a natural flow (a happy path) from the start of the Gliffy to the end of the Gliffy.

Additional Details: https://ops.emdeon.net/display/TQAD/Process+Flow