

Sample Policy Template with Instructions

Manual Section: (To be assigned by Management)

Policy Number: (To be assigned by Management)

Policy Name: (To be assigned by Management)

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Board Approval Date: __/__/__

Medical Director's Signature (when applicable): _____ **Date:** __/__/__

CEO's Signature: _____ **Date:** __/__/__

Effective Date: __/__/__ (if other than date signed by CEO or other date per policy)

Staff is to follow the format and instructions provided below when preparing policies.

A. Policy Statement:

Provide the parameter in active present tense within which the organization will operate. (i.e. the organization does not discriminate. . . ; the organization protects the confidentiality of. . . ; etc)

B. Background:

(Optional section) Provide a brief summary of the basis for the policy and procedures when such would be helpful to implementation; broad statements such as " State law requires this policy" or "This policy is developed to comply with applicable laws" offer no substantive information and are not to be used. If no background information is to be included, insert [Reserved] in this space so that such information may be added in the future as necessary.

C. Applicability:

Identify to whom the policy and procedures apply: employees only, all staff, staff and board, etc.

D. Definitions:

Provide operational definitions for any terms used within the Policy when the term may be unfamiliar, may be being used in an unfamiliar manner, or when a definition will assist staff and others to act consistently. If none, insert [Reserved] in this space so that such information may be added in the future as necessary.

E. Procedures:

Delineate the actions to be taken to implement the policy written in active present tense by position/group responsible, for example: "Directors are to . . ."; "Staff is to submit. . ."; To avoid confusion, use of "shall," "should," "will" is to be avoided. "May" is to be used only when the action truly is discretionary.

F. Statutes, Regulations, and Standards:

When a policy is to comply with a specific statutory, regulatory or accreditation requirement, provide the specific citation. Indicate N/A in this section when no one specific statute, regulation or accreditation standard is being addressed.

G. Distribution, Staff Development, and Training Requirements:

Describe how staff will learn of this policy and strategies and how staff will have access to it.

H. Monitoring Requirements:

Identify what positions/processes within the organization have been designated by management to monitor compliance with this policy.

I. Forms and Attachments:

Identify any forms or attachments as referenced within the policy sections by name and attachment designation (ex. Exhibit I: Sample Policy) Attach copies of any forms (marked "sample") required under the policy or note here how such may be obtained.

J. Originated By:

Identify the person/committee responsible for drafting the policy and/or strategies.

K. History:

Note review and/or revision dates. If the policy has been revised, note not only the date, but the section(s) revised as of that date