

**Document # and Title**

<b>Manual:</b> <i>Name of manual</i>	<b>Folder:</b> <i>Location in manual</i>
<b>Document Owner:</b> <i>Job title accountable to for oversight and the coordination of timely review, revision, and approval of the document (preferably manager level or above).</i>	<b>Original Approval Date:</b> <i>Time/date stamp of original approval generated by SoftTech</i>
<b>Approved By:</b> <i>Job title responsible for final electronic approval in SoftTech. Must have the authority to issue the document (director level or above)</i>	<b>Latest Version:</b> <i>Includes revision number and time/date stamp of approval in SoftTech system</i>
<b>Review Frequency:</b> <i>Maximum time requirement to review the document.</i>	<b>Next Review Date:</b> <i>Review document prior to this date</i>

When using this template, replace all descriptions in italics with Arial 12pt regular font. Line spacing set as single. Header and footer to remain blank as SoftTech will auto generate these upon upload and approval.

General recommendations for policy writing:

- a) *Ensure that the document is clear, concise and written in simple language for everyone to understand.*
- b) *Policy statements address the requirement or rule not how to implement the requirement or rule (see procedural section for the “how”).*
- c) *The use of acronyms is acceptable, but be sure to spell it out the first time it appears in the document.*
- d) *Words should be selected carefully; words such as “should” or “may” imply choice just as words such as “ensure” and “must” imply no choice (may be too restrictive). Avoid the use of “shall”.*
- e) *Don’t include information that may be quickly outdated (such as names or phone numbers).*

**PURPOSE AND SCOPE:** *(Mandatory section)*

*Describe the reason for which the document exists, why it is necessary, and who it is subject to.*

*Purpose: Limit to one paragraph stating important document content. Include, if appropriate, reference to external regulations/standards.*

*Scope: Describe the location (ex. Markham and/or Uxbridge and/or RCC) and who the procedure applies to (ex. this policy applies to all employees, volunteers, students, and contract workers). Describe any document exclusions (ex. this policy excludes volunteers) or consequences for non-compliance, if applicable.*

**POLICY STATEMENT(S):** *(Mandatory section)*

*List detailed policy statements in standard sentence and paragraph format. Ensure each statement addresses the “what” and not the “how”. Policy statements demonstrate consistency with organizational mission, culture, strategy and vision. Statements should accomplish something and be capable of being implemented. Statements should have a consistent opening phrase such as “The policy of Markham Stouffville Hospital is to ensure/provide...”*

**PROCEDURE:** *(Optional section)*

*Procedures describe “how to execute a policy” and “who needs to do what”. Not mandatory for every policy but provide additional details and use of a particular process or practice. If relevant, add any necessary equipment to carry out a procedure.*

**Guidance for writing procedural documents:**

**Action:** Describe the act being performed to achieve the purpose of the document (ex. Identification and documentation of allergies or adverse drug reactions on admission).

<p><b>Responsibility:</b> Job title(s) responsible to carry out the action (ex. Patient Registration Clerk)</p>	<p><b>Description:</b> Describe <u>how</u> the action listed above will be carried out by the individual(s) responsible. Typically written in a numbered list in order of execution (stepwise instruction). (example: i) During registration, ask patient if he/she has allergies. ii) Under "Allergy" in MEDITECH enter the allergy category. iii) Secure an allergy armband onto the patient.)</p>
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**DEFINITION(S):** (Optional section)

Describe the meaning of important or uncommon terms (words, phrases, etc.) used within the document.

**REFERENCE(S):** (Optional section)

List any sources used in preparing the document. Sources can include research evidence, manufacturer product literature, scientific journal articles, textbooks, published standards, and legislated requirements. Use APA (American Psychological Association) reference format. Also include any internal documents that may be linked to the document (ex. other internal policies or procedures or forms).

**RELATED DOCUMENTS:** (Optional section)

List any internal documents related to this document.

**RESPONSIBILITY:** (Mandatory section)

Outline all responsibilities for the endorsement and approval of the document.

Required Endorsements	Sponsor	Approval Authority
Job title of individual, group or committee that provides feedback and endorsement prior to approval. Include representation from those who are content experts and those affected by the policy/procedure.	Job title of individual responsible to present the document to approval authority.	Individual, group or committee that provides final approval of the document. Include those that are knowledgeable in the technical and/or administrative content and accountable for practice and execution.

**DOCUMENT HISTORY:** (Mandatory section)

Identify the individual/committee/group responsible for the task and the date it was finalized.

Type	Individual/Committee	Date	Outcome
Draft, Review, or Revision	For draft/revision: Job title of individual drafting the initial document or making changes to existing document. For review: Committee or group (i.e. senior leadership team)	Date task completed	For Draft: New Document; For Revision: Minor or major change, include documents superseded; For Review: No changes or Approved;

**APPENDICES:** *(Optional section)*

*Other documents/forms/flow charts related to this policy may be linked or referenced here.*