

TIPS FOR WRITING POLICY

FORMAT

- Policy title should not include the word “policy”.
- Enter effective and revised dates (NCQA requires the date policies are implemented and changed)
- Put policies on clinic letterhead or insert clinic logo.
- Standardize the format – Consider adding policy numbers for tracking purposes.

LANGUAGE

- Policies should be written to provide information to unfamiliar individuals/staff regarding day – to – day operations.
- Write the policy in the third person (using pronouns like he, she, it, and they).
- Use a present tense and positive tone (avoid using statements like: “The practice will _____” because it appears as though the clinic isn’t currently doing what is in the policy, but will at some point in the future.
- Ensure policies are written in clean, concise, and simple language (avoid jargon, overly technical descriptions, and wordy statements).
- Make sure policies do not include unnecessary or redundant information.
- Avoid terms and statements that can easily be confused or interpreted in multiple ways. Do not use information that may quickly become outdated such as employee names (use job titles instead of names for individuals responsible for certain tasks).
- If possible, avoid acronyms. If using acronyms, spell out the words the first time, then indicate the acronym in parenthesis; i.e. Statewide Healthcare Innovation Plan (SHIP).

REVIEW

- Attach forms that are related to the specific policy (i.e. patient intake form with patient intake policy).
- Embed visuals such as tables or lists for specific steps.
- When a draft of a policy is completed, check all facts and consult with appropriate members of the clinic team to ensure accuracy.
- Share the final draft of policies with staff and update them when changes are made.
- Create a plan to review policies regularly (i.e. yearly) and update as needed to provide appropriate direction for staff.
- Ensure policies are in an accessible space for employees to refer to.

NCQA

- Consider how you can combine multiple criteria into one policy.
 - ✓ You don’t have to have a separate policy for each individual criteria.
- Draw attention to the important points of the criteria.
 - ✓ Highlight, use margins for notes, or additional text boxes if needed.
- Submit (if possible) all criteria that need documented process for 1st check in.
- Label which NCQA Factor is covered in your policy when using it to submit for PCMH recognition.
- Save copies as PDF files, as that is the accepted format for Q-PASS.