Documented Processes and Policy Writing

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Outline

- Purpose
- Benefits
- Differences
  - Policy
  - Procedure
- Tips
- Activity
  - Good policy vs bad policy
- Resources
Before we get started...

I have a Question!
“Help businesses and organizations to formally set out what they intend to do and the means by which they will carry out the objectives.”
Benefits

- Who are you really writing for?
  - Helps your practice
  - Provides clear guidelines
  - Empowers staff
  - Reduces bottlenecks
  - Audits
  - Reimbursements
  - Culture
Policies and Procedures
Differences

<table>
<thead>
<tr>
<th>POLICY</th>
<th>PROCEDURE</th>
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<tbody>
<tr>
<td>“A rule, regulation, and set of guidelines.”</td>
<td>Specific</td>
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<tr>
<td>Establishes</td>
<td>Actions or instructions</td>
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<tr>
<td>▪ Values, ethics, commitments, and social responsibilities</td>
<td>▪ Who</td>
</tr>
<tr>
<td>▪ Safeguards</td>
<td>▪ What</td>
</tr>
<tr>
<td>▪ Ethical issues</td>
<td>▪ When</td>
</tr>
<tr>
<td>▪ Liability risks</td>
<td>▪ Where</td>
</tr>
<tr>
<td>▪ Guides</td>
<td>▪ Why</td>
</tr>
<tr>
<td>▪ Decision making</td>
<td>▪ How</td>
</tr>
<tr>
<td>▪ Develop procedures</td>
<td></td>
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<tr>
<td>▪ Time consuming</td>
<td>Compliance</td>
</tr>
<tr>
<td>▪ Several steps: writing, reviewing, approving</td>
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<td>▪ High value</td>
<td>Visual road map</td>
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General Tips

**INCLUDE**
- Plain language
  - Find it
  - Understand it
  - Use it
- Pronouns/Active Voice
- Short sentences
  - Break up the idea
  - To the point

**EXCLUDE**
- Jargon
  - Complex or fancy vocabulary
  - Acronyms
    - Write it out the first time
    - Ex: Patient Centered Medical Home (PCMH)
- Passive voice
- Long sentences
Formatting Tips

- Standardize
- Logo
- Legal disclaimer
  - (if needed)
- Policy numbers
  - Tracking
Other Tips

- Embed
  - Visuals
  - Workflow process
  - Lists
  - Steps
  - Tables
Recognition Tips

**PRACTICE**

- Recognition Timeline
  - Know your goals
  - Time for implementing new policies
    - Testing
  - Process and estimated time frame for policy approval

**NCQA**

- Include:
  - Practice name
  - Important dates
    - Created, implemented, and revised
  - Criteria
- For your NCQA reviewer:
  - Page numbers
    - Link one to multiple criteria
  - Submit
    - **ALL** documented processes for first virtual check-in
- Avoid
  - Submitting a new process at last virtual check in
  - NCQA reserves the right to hold it
More Tips

- Access
- Shared space
  - Shared drive
  - Sharepoint - Office 365
  - Cloud based products
- Be aware of the “paper tiger”
  - Wastes
    - Effort
    - Time
- Regular review
Activity
Medical Group Management Association (MGMA)


Policy Tech

Questions
References

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