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

POLICY
- “A rule, regulation, and set of guidelines.”
- Establishes
  - Values, ethics, commitments, and social responsibilities
- Safeguards
  - Ethical issues
  - Liability risks
- Guides
  - Decision making
  - Develop procedures
- Time consuming
  - Several steps: writing, reviewing, approving
- High value

PROCEDURE
- Specific
  - Actions or instructions
    - Who
    - What
    - When
    - Where
    - Why
    - How
- Compliance
- Visual road map
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
Best Resources

you.
Local Resources
Other Resources

- Medical Group Management Association (MGMA)

- Policy Tech
Questions
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