

Introduction

Policies and procedures (P&Ps) can be user-friendly and also support compliance on a daily basis. Policies that lead to better outcomes are those that are accurate, clear, concise and flexible enough that your team can adjust workflows to best meet the care needs of residents.

When performing your policy review, consider these:

Source: Amy Franklin, RN, DNS-MT, QCP-MT

<https://www.mcknights.com/news/ask-the-nursing-expert-about-policies-and-procedures/article/671554/>

1. A policy identifies issues and scope

You and your staff will be held accountable for adhering to your P&Ps, as written, in day-to-day operations, during both survey and litigation processes.

2. It's not necessary to include workflows

You don't need a P&P for every action in the facility, and certainly not for all workflows. In fact, many workflows can be taken out of policies and included in protocol documents.

Examples include ordering labs and completing a requisition form for medical equipment

3. A policy should not be too exclusive

Sometimes policies stipulate that only an RN can perform certain tasks, when, in fact, under the state's nurse practice act, a trained LPN also would be appropriate

4. Procedural manuals are helpful resources

Instead of writing out each P&P to exhaustion, it is sometimes appropriate to refer to a current, evidence-based resource, such as Lippincott procedures for LTC.

5. Short & Simple is better than all-encompassing

Policies should be one to two pages long. If a policy has more than two pages, it likely needs to be divided into separate policies, or a workflow needs to be removed

Guidelines



Help Tips

- 1. Use a template for consistency.** Capture your procedure using a template can help keep them structured and consistent.
- 2. Go through each task or process step by step.** As you create your procedure, think about each step you take to complete it. Write the steps down much like you would an outline. Then go back and fill in the details or background information where appropriate.
- 3. Think commands, not sentences.** You want to be specific without being excessively wordy. People are more likely to read simple commands than complete sentences, especially if they are in a hurry.
- 4. Use bullets or numbers as much as possible.**
- 5. Number the steps that need to be completed in a specific order.** Use bulleted lists for non-order specific instructions.
- 6. Provide screen shots for computer-related tasks.**
- 7. To make your procedures even more effective, create a graphic or visual, such as a screenshot, of computer-related tasks to accompany the printed or written instructions.**
- 8. Ask another person to test your procedures.** The best way to know if your procedures will work is to have someone else test them out. Ask them to identify items that don't make sense, and list any questions they have about the procedures. This will help you identify gaps and fix them.