

Document Title – Document Type

Responsible Office: Office with supervision for this policy
Policy Sponsor: Name of the subject matter expert
Effective Date: Date the document becomes effective and enforceable

Scope

The scope section outlines the policy's boundaries, objectives, and limitations concisely at a broader level. It explains who is affected by the policy, who should observe it, and who must understand it to do their job or utilize services.

Reason for the Policy

The Reason for the Policy recognizes the legitimate interests of all parties, describes the problem, or conflict the policy will resolve, and cites any legal or regulatory reasons for the policy.

Definitions

List unique terms that, by being defined, would add to the reader's understanding of the policy. Define unfamiliar terms, technical terms, and terms with special meanings. List all terms in alphabetical order.

Term 1

Enter definition text here.

Term 2

Enter definition text here.

Term 3

Enter definition text here.

Policy Sections

This section allows for a fuller description of the contents than what was possible in the scope and reason for the policy sections. Generally, 1 to 4 paragraphs. Number each section heading and paragraph within that section sequentially using the following format.

Level One – Paragraph Heading (e.g.,1,2,3,)

Level Two– Sub-Paragraph (e.g.,1.1.,1.2.,1.3.,)

Level Three – Sub-Sub Paragraph (e.g., a. b., c., d., etc.)

Level Four – Sub-Sub-Sub Paragraph (e.g., ii., iii., iv., etc.)

1. Paragraph 1 Name

Enter paragraph text.

1.1. Enter sub-paragraph text here.

a) Enter sub-sub paragraph text here.

(i) Enter sub-sub-sub paragraph text here.

2. Paragraph 2 Name

Enter paragraph text here.

2.1. Enter sub-paragraph text here.

a) Enter sub-sub paragraph text here.

(i) Enter sub-sub-sub paragraph text here.

3. Paragraph 3 Name

Enter paragraph text here.

3.1. Enter sub-paragraph text here.

a) Enter sub-sub paragraph text here.

(i) Enter sub-sub-sub paragraph text here.

Special Situations & Exceptions

This section is used to clarify any special situations or exceptions applicable to the document. Exceptions must be documented using the Exception Form and directed to the appropriate policy sponsor's email address using below language: *Note: Exception requests for YSM Finance documents must be directed to ysmcontroller@yale.edu.*

Exceptions to this policy must be documented using the [YSM Policy/ Procedure/ Guideline Exception Request - Form](#) and presented to XXX@yale.edu.

Roles & Responsibilities

List the responsibilities, using the format below, of all YSM parties and offices. Entries in this section typically are requirements (not recommendations) that are essential to the administration and/or compliance of the policy.

Example:

University Policy Officer

- Maintain a policy template.

Role 1

- Responsibility 1.
- Responsibility 2.

Role 2

- Responsibility 1.
- Responsibility 2.

Contact Information

The contact section tells the reader who to contact with specific questions regarding the policy. Responsible office and/or subject matter expert contact information should be listed here.

- **Topic 1:** *Contact Office 1:* email and/or telephone number
- **Topic 2:** *Contact Office 2:* email and/or telephone number
- **Topic 3:** *Contact Office 3:* email and/or telephone number

Related Information

This section identifies other legal and policy authorities related to administering this policy that should be consulted because they are interconnected. This is a required data element if relevant. This area should not contain explanatory text in this section- only a list of titles and corresponding links.

Related document 1
Related document 2
Related document 3

References

If relevant, Include a list of internal/external reference materials with titles and links.

Reference document 1
Reference document 2
Reference document 3

Version History

Include a few sentences about what changed with each version. Indicate the most recent version at the top. Please follow the format given as an example.

- **Date:** Revision History Summary

Example:

- **05/02/2023:** Regulatory Change; Major Revision to section 5.3.1 (a), shared visits now are based on time instead of solely on medical decision making.
- **04/03/2023:** Regular review, no major changes.
- **011/12/2023:** New document (no prior history)

Keywords

Include a list of keywords and/or key phrases that can be used to search for this document when published in PolicyTech.

Responsible Official:	Title of the highest-ranking university officer for this area (i.e., deputy dean)
Document Administrator:	Name of the designated PolicyTech administrator
Date of Origin:	Original Creation Date

Approval Date:

Most recent approval date

The official version of this information will only be maintained in an on-line web format. Any and all printed copies of this material are dated as of the print date. Please make certain to review the material on-line prior to placing reliance on a dated printed version.
