

Document Title – Document Type

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

Scope

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

Procedure Purpose

The Procedure Purpose sets out why the procedure exists and what it is intended to achieve. This is a required data element.

Definitions

List unique terms that, by being defined, would add to the reader's understanding of the procedure. 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.

Procedure Sections

This section allows for a fuller description of the contents than what was possible in the scope and purpose 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 procedure sponsor's email address using below language: *Note: Exception requests for YSM Finance documents must be directed to ysmcontroller@yale.edu.*

Exceptions to this procedure 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 procedure.

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 procedure. 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 procedure 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.
