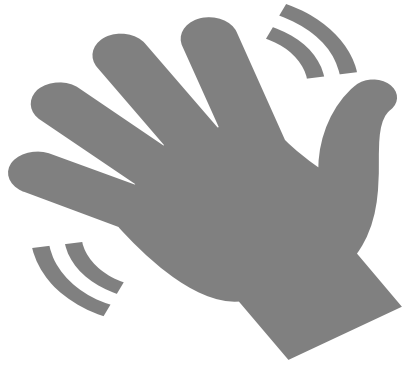


# Policy and Procedure Management: Practical Tips for Success

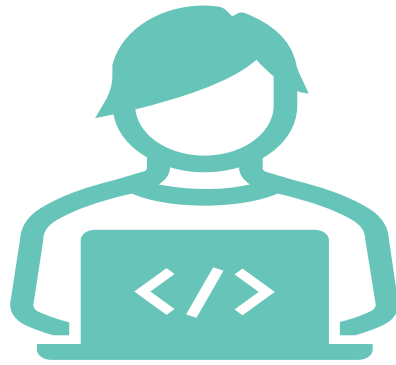


From a previously recorded webinar  
July 20, 2026

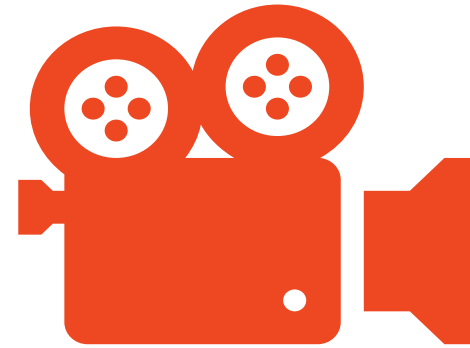
# Before We Get Started



Introduce yourself in the chat box and tell us what organization you're with



Message Nick Davis for any technical issues



We're recording and you'll get the link within a week



Use the chat box for questions and comments  
**AT ANY TIME**

*Please do not use any AI platforms to record or take notes on this webinar.  
Anyone using one of these tools will be removed from the webinar.*

# The URAC Team



Carmen Galloway, RN, BSN, CCM  
Clinical Accreditation Reviewer



Lisa Silverman, MA  
Client Education Specialist

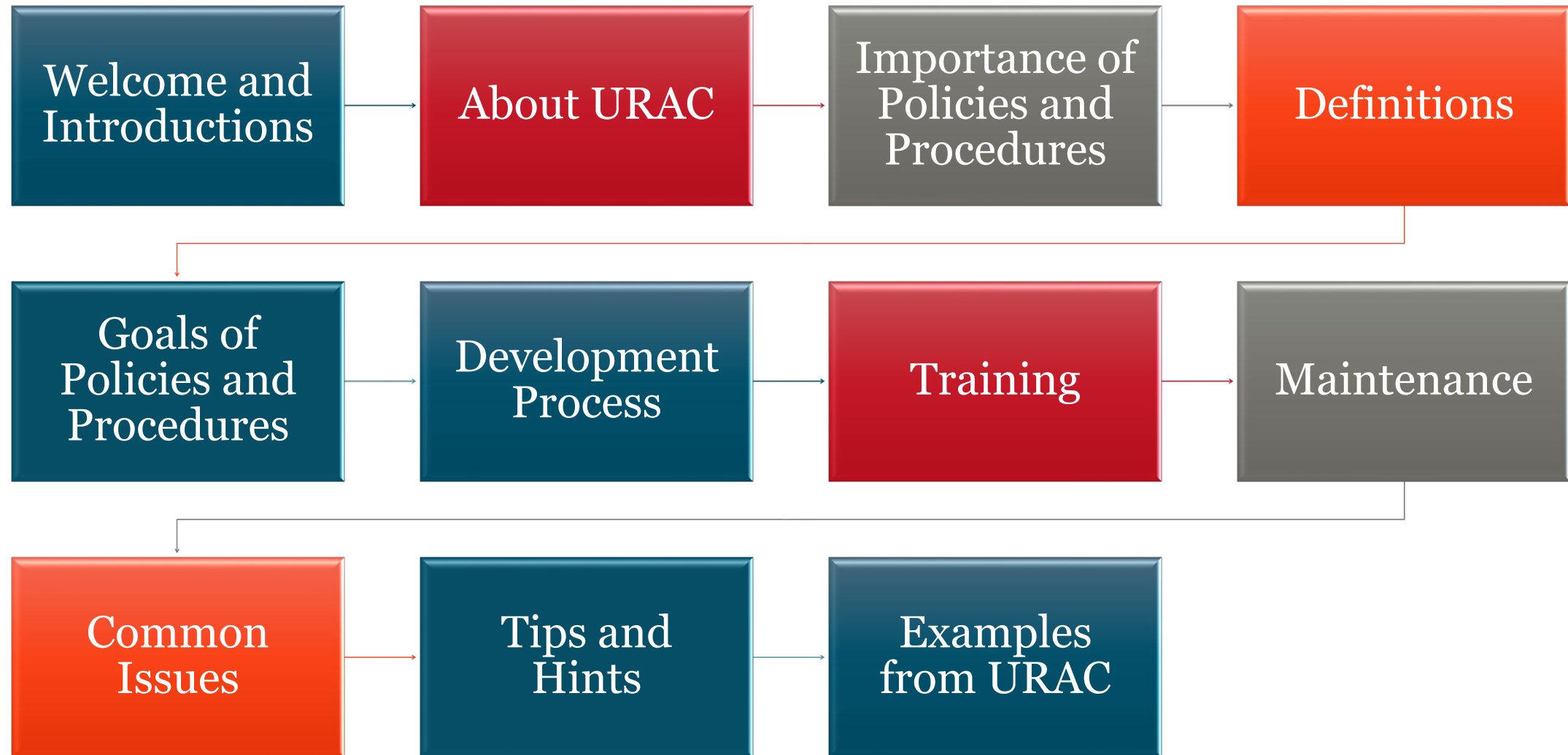


Dawn Landolph, MPA, BSN, RN, OCN  
Pharmacy Accreditation Reviewer



Jeff Wussow  
Business Development  
Executive

# Agenda



# URAC Connect 2026

Wednesday, October 14 through Friday, October 16

Washington Marriott Georgetown

Washington, DC

## Registration Rates and Dates

Regular: \$1,379, until September 11

<https://www.urac.org/connect>





# About URAC

Jeff Wussow

We have *over 35 years of experience* as  
an accreditor

\*\*\*

We believe in growth through *education  
and quality improvement*

\*\*\*

We understand that *excellence looks  
different* in every organization

\*\*\*

We accredit organizations in the *US and  
internationally* across telehealth, AI,  
pharmacies, health plans and health systems



**Modern Healthcare**

**2025 BEST IN  
BUSINESS**



**ACCREDITED**



**CERTIFIED**

# URAC's Approach

Accreditation is all we do with quality as the focus

Our rigorous, meaningful standards reflect what quality looks like in health care for today and the future



**Education:** Helps teams build the knowledge to sustain improvements for the long haul



**Flexibility:** Recognizes strengths and needs of each organization



**Trust:** Builds long-term relationships to support ongoing excellence

# URAC's Accreditation Programs



## Health Care AI



## Excellent Health Outcomes (FKA Health Equity)



## Mental Health at Work



## Digital Health

- Health Website
- Telehealth



## Patient Care Management

- Case Management
- Disease Management
- Health Contact Center
- Health Utilization Management
- Independent Medical Examination
- Independent Review Organization
- Workers' Compensation Utilization Management



## Mental Health and Substance Use Disorder (MH/SUD) Parity

- Compliance Guide
- ParityManager®
- Accreditation



## Administrative Management

- Clinically Integrated Network
- Community Health Worker
- Credentials Verification Organization
- Employer-Based Population Health
- Health Contact Center
- Health Care Management\*



## Health and Dental Plan

- Dental Network
- Dental Plan
- Health Network
- Health Plan
- Health Plan with Long-Term Services and Supports
- Marketplace Health Plan
- Medicaid Health Plan
- Medicaid Health Plan with Long-Term Services and Supports
- Medicare Advantage



## Pharmacy

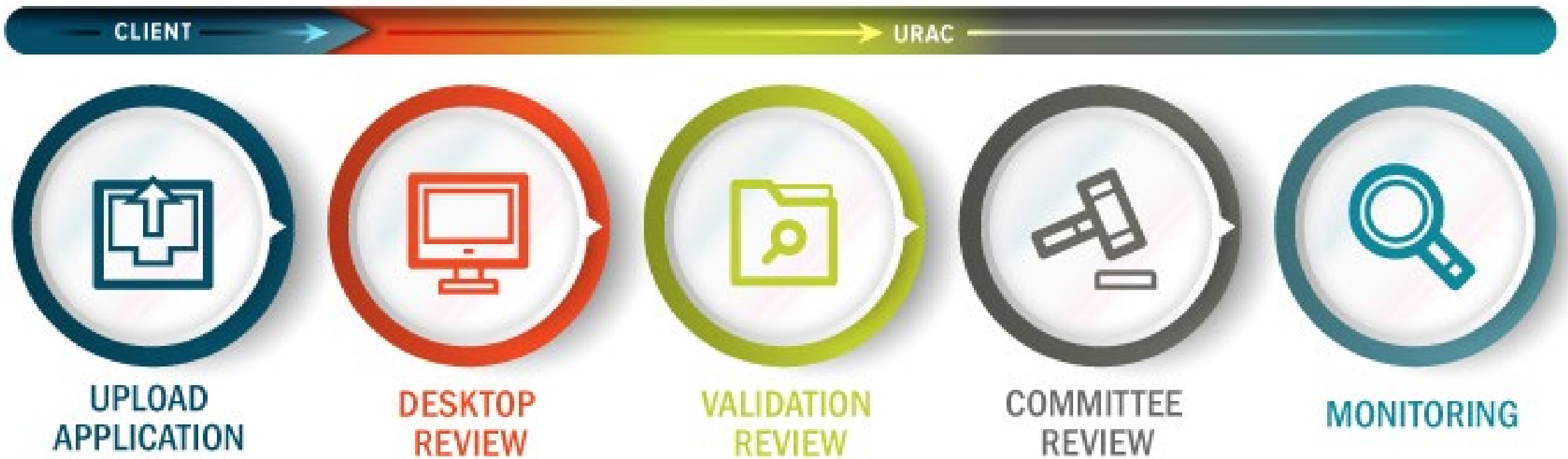
- Infusion Pharmacy
- Medicare Home Infusion Therapy Supplier
- Mail Service Pharmacy
- Pharmacy Benefit Management
- Pharmacy Services (choose up to four modules)
  - Community Dispensing
  - Drug Therapy Management
  - Point of Care Testing
  - Vaccine Administration
- Specialty Pharmacy
- Specialty Pharmacy Services
- Rare Disease Center of Excellence\*

\* Denotes program is a certification

# Some of Our Clients



# ACCREDITATION PROCESS

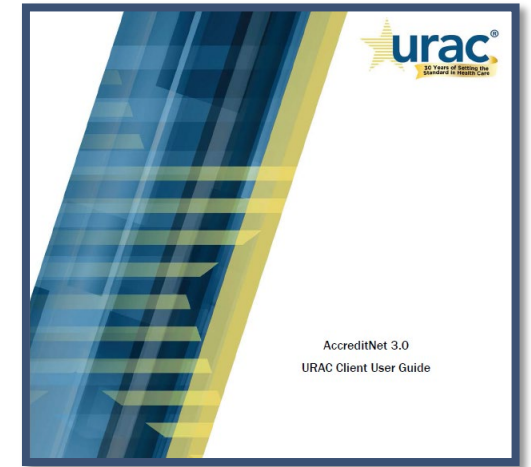




Client Relations  
Manager



Program Guide



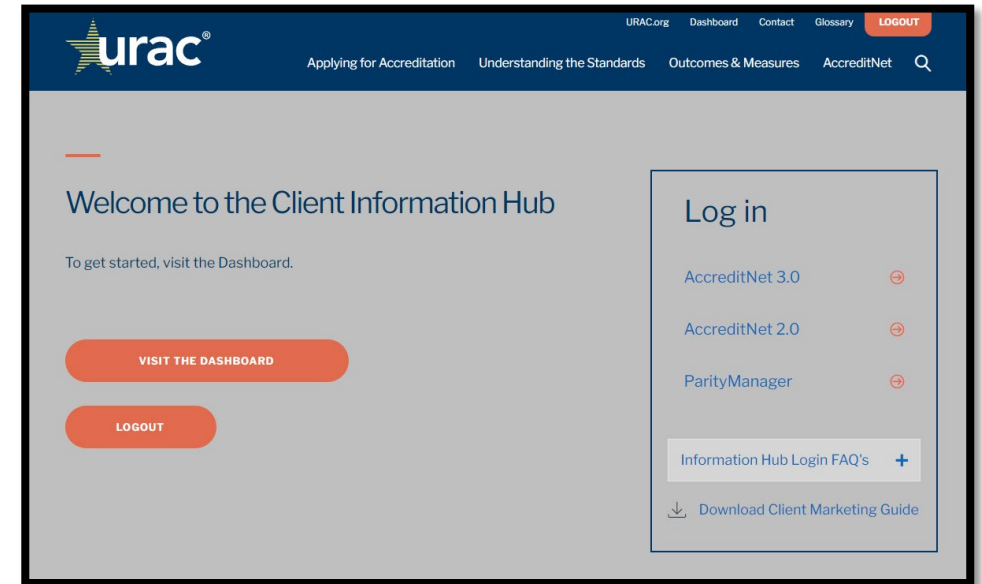
AccreditNet Guide

People

Tools



Accreditation Reviewer



Client Information Hub



# The What and the Why of Policies and Procedures

Carmen Galloway

# Importance of Policies and Procedures

## Internal Reasons

- Establish rules of conduct
- Protect rights of workers
- Protect business interests
- Provide standardization in daily operational activities
- Provide clarity when dealing with issues and activities that are **critical to health and safety, legal liabilities, and regulatory requirements**

## External Reasons

- Guide employees in meeting the standards
- Demonstrate continuing compliance with the standards
- Demonstrate that your organization has the capacity to meet the standards

# Benefits of a Policy or Procedure

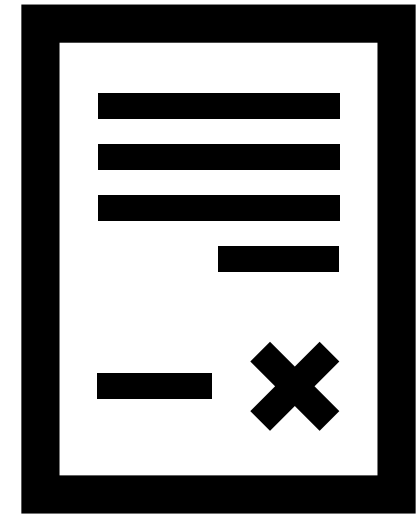
Defines the organization's stance or goal on a certain topic

Controls outcomes through defined processes

Ensures employee expectations are clear

Makes training easier

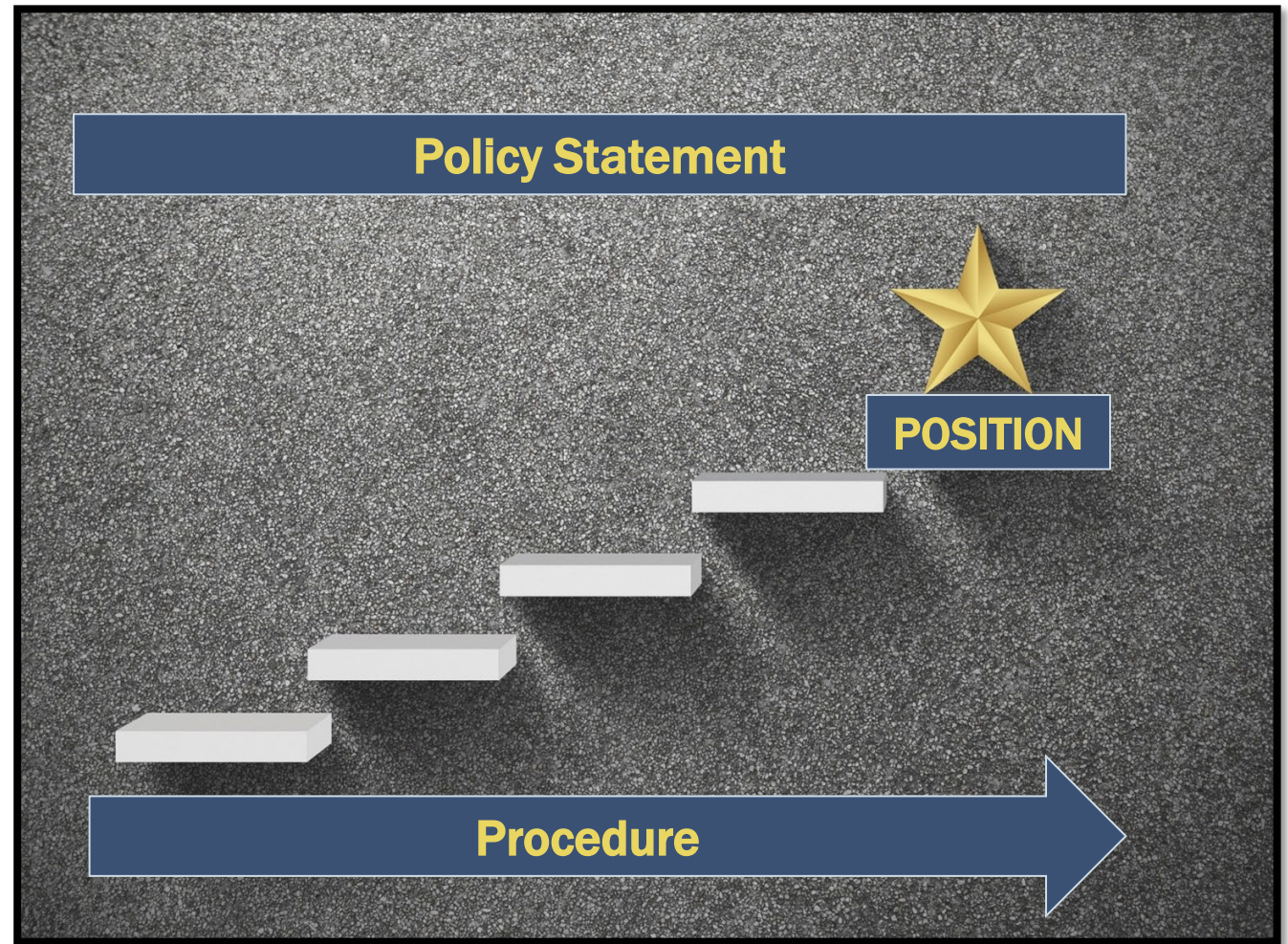
Manages and reduces company risk



# Policy Statement v. Procedure

**POLICY STATEMENT:**  
should **define** your  
organization's **stance** on a  
particular subject

**PROCEDURE:** should define  
the **process to achieve and  
maintain** the organization's  
stance on a particular subject



# Examples of Each

## Policy: The What

The organization provides all members with the necessary training, immunizations and personal protective equipment (PPE) needed for protection from communicable diseases.

We meet the special needs of persons who are deaf, blind, or hard of hearing.

## Procedure: The How

Headquarters mails a box of supplies to remote staff every other month with masks, gloves and hand sanitizer.

Team members submit a request for patient materials to be created with options for large-print, Braille or screen readers to the Marketing team.



# Developing Policies and Procedures

Carmen Galloway

# Development Process

## Templates

1

- Stick with one template

2

- Include the organization's name and/or logo

3

- Use strong numbering and naming conventions

4

- Include key dates: effective, review, and revision

5

- Include the approval authority

# Development Process

Body of the Policy or Procedure

Ensure the **title** of the policy and procedure adequately reflects the purpose of the policy and procedure

Give a **number** to the policy and procedure

Create a policy/**purpose statement**

Define the **scope** and responsibilities

Create a step-by-step **process on HOW** employees should go about achieving the goal or stance

# Development Process

Additional Information

Include a section for

- Any referenced materials
- **Laws and regulations**
- External resources



Include a definitions section

- Especially if you are using **unique terminology** or terminology **specific to your organization**
- Define any acronyms or abbreviations here



# Development Process

Relevancy

Policies and procedures  
do not need to control  
every employee action

Not every policy and  
procedure is going to be  
relevant to every  
employee

Check your processes for  
relevancy (i.e., is it  
necessary to complete  
that step to achieve the  
goal of the organization?)



# Document Control

Dawn Landolph

# Document Control: The Master List

Serves as a reference point for everyone in the organization to have easy access to a list of all policies



Policy Name



Policy Number



Effective Date



Review Date



Revision Date



Person Responsible for Approval

# Document Control: When to Revise



# Document Control: Versions

**Document version control**  
is the process of **tracking**  
**and managing different**  
**versions of a document**, so  
you know which is the current  
iteration of a file.

## *Why do you need version numbers?*

- Provides an audit trail for each revision
- Allows you to refer easily to previous versions to determine when changes were made
- Ensures all employees are working from the same document

# Version Numbering

## Policy sequential numbering

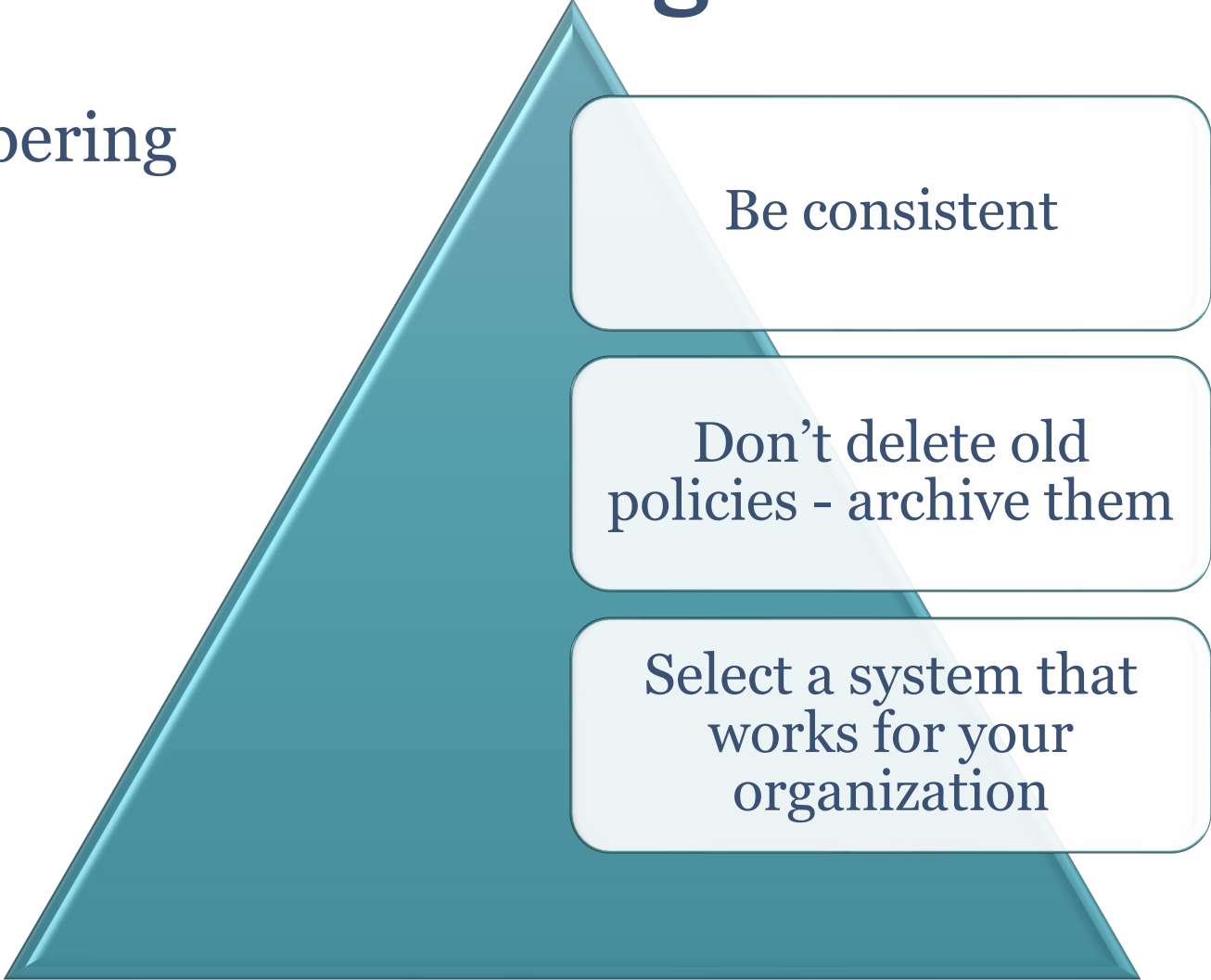
Example: Policy 25

- 25.0.0 (original)
- 25.0.1 (first revision)
- 25.0.2 (second revision)
- 25.1.0 (tenth revision)

## Version identification

Example: Policy 25

- Policy 25 v1.0 (original)
- Policy 25 v2.0 (first revision)
- Policy 25 v3.0 (second revision)



Be consistent

Don't delete old  
policies - archive them

Select a system that  
works for your  
organization

# Dissemination of Policies

**Disseminate new, changed, and/or updated policies and processes to staff in a timely manner**



Email



Newsletter



Staff Meeting



E-signature

# Review, Revise, Release, Repeat

Review continuously

Gather input

Make changes to policies and procedures before implementing or changing a process

Update policies: effective dates, review dates, revision dates and approval authority

Ensure staff have most up-to-date policies





# Tips and Frequently Asked Questions

Dawn Landolph and Carmen Galloway

# URAC Reviewer Tips for Success

**Own your  
policies and  
procedures**

**You know your  
own process best**

**Quality is more  
important than  
quantity**

**Know what you do**

**Review for  
improvements  
continuously**

# Frequently Asked Questions



If an existing policy needs to be updated, can we rename it? Or do we need to archive the previous policy and create a new one?



Who should review the policies and procedures?

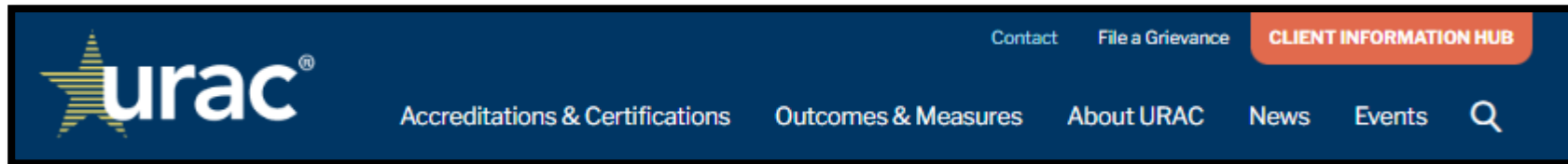


How can we combine policies to meet multiple accreditation agencies?

# Connect with URAC

Sales and New Business Information  
[businessdevelopment@urac.org](mailto:businessdevelopment@urac.org)

Current Clients  
[clientrelations@urac.org](mailto:clientrelations@urac.org)



Like URAC on [Facebook](#) • Follow URAC on [Twitter](#)  
Connect with URAC on [LinkedIn](#) • Watch URAC on [YouTube](#)

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    - Article written 2/2019
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  - How to Write Policy & Procedure Task Outlines
    - No written date
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- Policy Medical: [policymedical.com](http://policymedical.com)
  - The Importance of Healthcare Policy and Procedures
- Boise State University: [policy.boisestate.edu/policy-writing-guide/](http://policy.boisestate.edu/policy-writing-guide/)
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- Rebels Guide to Project Management
  - <https://rebelsguidetopm.com/how-to-do-document-version-control>



## Take It Home

**What works for your organization's policies and procedures?**

**What are you going to do differently following this session?**