Health policies and procedures for Healthcare Organisations

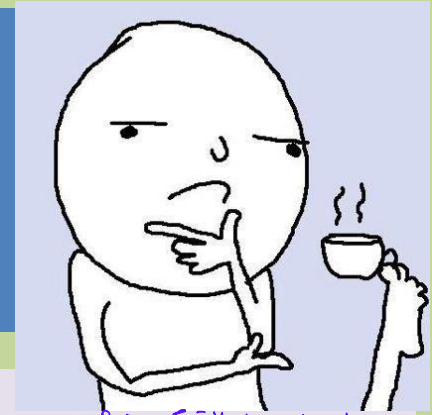اللهم صلِ على سيدنا محمد ..

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2025

Introduction

- **Providing healthcare services IS COMPLEX!**

- **Health care organizations use policies and procedures Health organizations use them to reduce complexity and standardize practices.**

- **While direct patient care is the primary focus, maintaining updated and Well-written policies is important for:**

✓ **Reducing practice variability (minimizing substandard care/patient harm).**

✓ **Reducing risks (malpractice, claims, etc.).**

لتقليل هاد التعقيد منعشي على

منقدر نرجع لهاي ال P and P لوكان عنا خطأ بال practices الي عملناها ← لنقارن ونشوف وين الخطأ؟

procedures and policies

منهمش كلنا أ (مستشفيات) على نفس ال لحتى نقلل ال Variability بالحماية الصحية فن مكان لأخر

Definition: What is a policy?

مبدأ

A **policy** is a set of principles that:

- Outlines the **situation, goal, or purpose** of an organization. سواء قطاع عام شو بدنا نحققه شو الهدف من هالسياسات
  أو خاص وهكذا ابجان الخ بالضبط؟؟ بسياسة الهيئة وعلاقة بالموظفين
  الهدفه تنظيم الموظفين أكثر وهكذا

- Guides **decision-making** (actions or inactions). تساعد في اتخاذ القرارات

- Applies to **processes, activities, or expected scenarios**. (Hollnagel et al., 2014). ما قرأتكم

Examples of hospital policies

Policy:

1. Patient Care Policies:

خلاص هونالك هذالك المستشفى للمرضى و المعروف عند الجميع انه اغلب الولادات بتكون طبيعية بالعادة

- Promoting Natural Childbirth: Prioritizing non-interventional delivery methods when medically safe.

- Patient Safety Protocols: Ensuring adherence to safety measures to prevent harm (e.g., fall prevention, infection control).

مثلا السلامة المتبعة في المستشفى اسم جهاز المحراة الطبى المعين مابعده غير معطلات موجودات بأذنه وأصدر من الطبيب

- Medication Administration:

Rule: Medications may only be given by a **qualified registered nurse**.

Requirement: Must follow a **written physician's order**.

2. Employment Policies

Employee Resignation: Requires a **3-month notice** from the employee before contract termination.

ما قرنتهم بس اضظلومهم هو خالط

Employer Termination: Requires a **1-month notice** to the employee before contract termination.

ولا يبغي اهنل هو ظهر متى لازم اخبره ....

استقالة الموظفين مثلا ← قبل كم لازم تبلغ الادارة عنه هذا القرار

كل حسب السياسة المتبعة في الشركة

Definition: Procedure?

A **procedure** is a series of **intentional, step-by-step actions** to:

- Achieve a specific **objective** under defined circumstances.

- Guide **who does what, when, and how** to implement a policy.

i.e. How to carry out the policy!

Policy vs procedure

Policy	Procedure
• Usually expressed in broad terms • States "what" or "why" • Changes less frequently • Describes values, philosophy of the organization	• Usually stated in detail • States "How" and "Who" and "When" • Prone to change • Describes process

Policy

Employee should provide three months notice before terminating his/her contract

Procedure

How does the employee request contract termination?

How to fill out the form?

How to track the request?

Who is responsible for processing the form?

الفهم علاقة فقط بال clincal care

Protocol: Synonymous with procedure. Often used when describing **clinical patient care-related interventions**. It Standardizes patient care steps.

For example, a chemotherapy protocol or protocol to quality healthcare delivery.

Guideline: Recommended actions for **a specific situation or type of case.** It Provides flexibility for clinical judgment. تعليمية أكثر من البروتوكول

For example, A clinical practice guideline that outline blood-testing practices for patients who are taking anticoagulants.

قلك لك أخذ عينة دم
كيف تشوفال (vain)
وبنتوم بال (need) به التزاح وهكذا

COVID-19 Adult Clinical Evaluation Guide

Consider COVID-19 in a patient with any of the following:
- Fever
- Cough
- Shortness of breath
- High risk travel/exposure

Clinical Signs/Symptoms
- Fever seen in >75% of hospitalized cases at some point *but almost 50% are afebrile on admission*
- Cough 60-80% (dry or productive)
- SOB 20-40%
- URI symptoms (HA, sore throat, rhinorrhea) in <15%
- GI symptoms (diarrhea, N/V) in <10%

Labs
- Check CBC with diff, BMP, LFTs, procalcitonin
- Clues to COVID-19: leukopenia, lymphopenia

Labs and biomarkers
- Median WBC 4.7, with leukopenia in 30-45% (leukocytosis in <5%)
- Lymphopenia in 33-85%
- Median platelets normal, but slight decrease in 35%
- AST/ALT increase in 4-22%
- CRP increased in 61-86%, LDH increased in 27-75%
- PCT: ≥0.5 in 5.5% overall (14% if severe, 24% if ICU)

Microbiology
- Check rapid flu/RSV, RVP
- Consider blood cultures, sputum culture
- Clues to COVID-19: absence of other pathogens

Microbiology
- Coinfection rate with viruses and bacteria is unknown but is low in published studies to date
- The presence of an alternative viral etiology (eg influenza) makes COVID-10 less likely (exception: rhinovirus since this is a common co-pathogen)
- Bacterial coinfection might increase with severity of illness so *bacterial infection in a severely ill patient does not exclude COVID-19*

Imaging
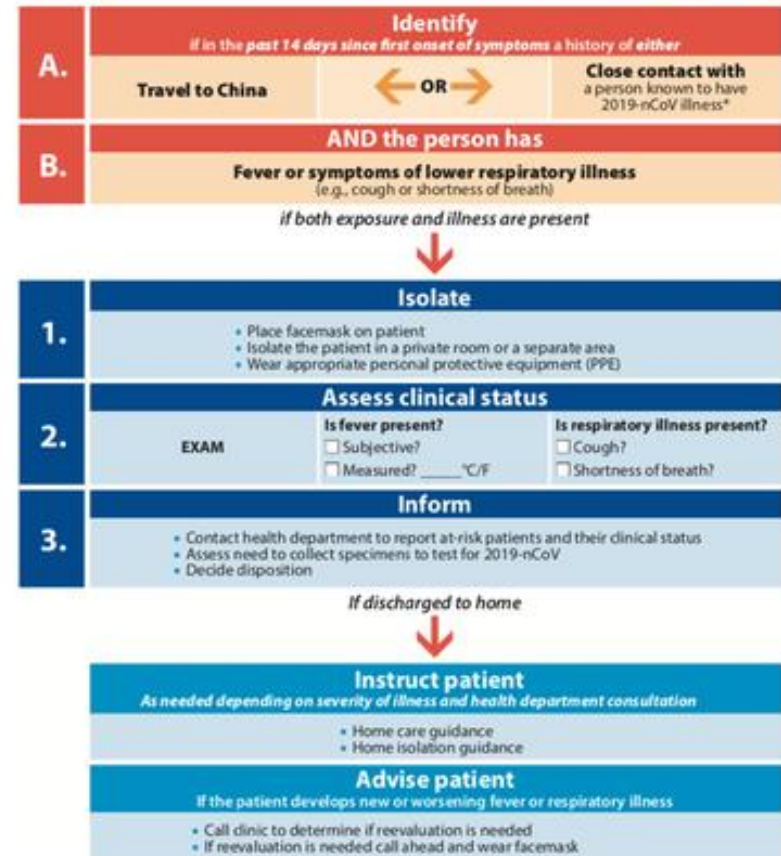- CXR in all patients
- If CXR (-), consider CT for better sensitivity for PNA and to exclude alternative dx
- Clues to COVID-19: bilateral, GGO, peripheral distribution

Imaging
- CXR abnormal in 60% (77% if severe), chest CT abnormal in 86% (95% if severe)
- Unilateral findings on CXR or CT in 14-25% (especially if mild or early in disease)
- Most common findings: GGO and patchy consolidations (>50%), peripheral distribution >50%
- Nodules, LAN, cystic changes, effusion in <10%

Flowchart to Identify and Assess 2019 Novel Coronavirus

CDC

For the evaluation of patients who may be ill with or who may have been exposed to 2019 Novel Coronavirus (2019-nCoV)

A. Identify
if in the past 14 days since first onset of symptoms a history of either

Travel to China ← OR → **Close contact with** a person known to have 2019-nCoV illness*

B. AND the person has
Fever or symptoms of lower respiratory illness (e.g., cough or shortness of breath)

if both exposure and illness are present

1. Isolate
- Place facemask on patient
- Isolate the patient in a private room or a separate area
- Wear appropriate personal protective equipment (PPE)

2. Assess clinical status
EXAM
Is fever present?
☐ Subjective?
☐ Measured? _____ °C/F
Is respiratory illness present?
☐ Cough?
☐ Shortness of breath?

3. Inform
- Contact health department to report at-risk patients and their clinical status
- Assess need to collect specimens to test for 2019-nCoV
- Decide disposition

If discharged to home

Instruct patient
As needed depending on severity of illness and health department consultation
- Home care guidance
- Home isolation guidance

Advise patient
If the patient develops new or worsening fever or respiratory illness
- Call clinic to determine if reevaluation is needed
- If reevaluation is needed call ahead and wear facemask

* Documentation of laboratory-confirmation of 2019-nCoV may not be possible for travelers or persons caring for patients in other countries. For more clarification on the definition for close contact see CDC's Interim Guidance for Healthcare Professionals: www.cdc.gov/coronavirus/2019-nCoV/hcp/clinical-criteria.html

The Purpose of Policies and Procedures

Formalized, written policies and procedures fulfill a number of important purposes:

1. Ensure adherence to professional practices and Reduce practice variation for consistent care. (standardization). وتحسين مع القوانين والأنظمة

2. Promote compliance with regulations. (i.e. All policies and procedures should not contradict with the government rules and regulations and MOH policies and procedures).

3. Accreditation Readiness: Meet standards for audits and certifications. الاعتمادية ← الشهادات التذكرة

4. Role Clarity: Define staff responsibilities, especially for new hires. كل حد يعرف مسؤولياته خصوصاً الموظفين الجدد

5. Error Reduction: Minimize reliance on memory—a leading cause of human errors. * تقليل الاعتماد على الذاكرة

Types of hospital policies and procedures

There are several types of hospital policies and procedures but the main ones are :

1. Philosophical : كل ما يتعلق بفلسفة هاي المؤسسة الصحية

- ## Code of Ethics:
  Example: "Staff must refuse gifts from pharmaceutical companies to avoid conflicts of interest."

- ## Mission/Vision:
  Example: "Our mission: To provide compassionate, evidence-based care to all patients, regardless of background."

- ## Communication Culture:
  *Example: "Daily team rounds must: Include the bedside nurse, attending physician, and pharmacist.' (Effective communication keeps internal processes running smoothly and helps to create positive relations with people both **inside and outside** the organization).*

Types of hospital policies and procedures

2. Administrative

General Rules and Regulations

- Code of conduct
- Dress code
- Workplace behavior

Smoking and Environmental Health Policies

- No-smoking zones
- Waste management and hygiene protocols

Security Policies

- Access control
- Emergency response (e.g., fire, active shooter)

Total Quality Management (TQM) Policies

- Patient safety protocols
- Continuous improvement initiatives
- Compliance with healthcare standards

Policy Covering:	**VISITING HOURS**		
Effective Date: Reviewed: Revised:	September 2010 May 2013 March 2015	Category: Patient Administration	Policy # 602
Prepared By:	VP of Patient Care Services	Supersedes Policy #/Dated: May 2013	Page 1 of 1
Issued By:	President/ CEO		

Policy: It is the policy of the hospital to provide a patient centered approach to care. In an effort to balance patient needs with nursing/therapeutic/diagnostic care, the hospital has established the following criteria for visiting hours.

1. **General Criteria**
    a. The hospital is open for visiting during the hours of 0800 to 1830 and 1930 to 2200. Health care staff has the discretion to direct visiting in order to meet the health care needs of the patient and to address security issues during the evening/night;
    b. Visiting criteria do not apply to clergy/chaplains;
    c. Short visits are encouraged as patients need to rest, unless visitors are providing care for their loved one, ie. feeding, keeping the patient from harming themselves;
    d. Generally visitors will be restricted to two (2) at a time;
    e. There will be times that visitors will be asked to leave the patient room. Examples of these instances are: if any patient in the room requires nursing care or treatment during a visit; the room needs cleaned; and others as they arise. Visitors will be discouraged from staying in the halls and will be asked to use the quiet room or day room;
    f. Children under twelve (12) years of age are only permitted to visit provided they are well behaved and supervised at all times by an adult; and
    g. Children under twelve (12) years of age will be restricted from visiting patients with C. diff. Other ARO patients may also have restrictions based on the organism/circumstances.

Exceptions for specific types of patients

Types of hospital policies and procedures

3. Human Resource Management Policies

كل ما يتعلق بال employees

- Ensure staff compliance with organizational rules and regulations.

- Promote employee well-being and professional development.

- Enhance staff skills to maintain high-quality healthcare services.

Examples:

Leaves and Personnel Processes

Vacation, sick leave, and maternity/paternity leave policies

- Hiring,, and termination procedures

Staff Development

- Training programs

- Continuing education requirements

- Performance evaluation processes

Types of hospital policies and procedures

4. Information Management Policies

- To manage how sensitive information (staff, patient, or visitor-related) is collected, stored, shared, and protected, ensuring compliance with privacy laws and maintaining trust.

Include: Confidentiality, Electronic Health Record (EHR) usage, Cybersecurity protocols, Data backup and recovery, Patient privacy safeguards

Types of hospital policies and procedures

5. Internal Communication Policies

- **Memo policies:**
  - Target only relevant departments
  - Management notification or short report
  - General distribution
  - Delegation of authority
- Must include clear subject lines, dates, and sender/receiver details.
- Use bullet points for action items; limit to one page when possible.

Examples:

- Urgent Issues: Immediate via email/phone with written follow-up.

- Routine Updates: Weekly summarized reports (e.g., staffing, incidents; A short incident report from Nursing to Risk Management).

POLICY MEMO

DATE: January 1, 2009

TO: All Employees

FROM: Headquarters Accounting & Finance Department

SUBJECT: Business Travel and Expense Policy

EFFECTIVE: January 1, 2009

I. TRAVEL

All business travel must be approved and reasonable expenses discussed with the immediate supervisor in advance of travel and prior to incurring expenses.

A. Travel Arrangements

Every effort should be made to make advance travel arrangements to minimize costs to the Company. Whenever possible, employees are to arrange transportation in the least expensive way possible by securing available discounts and special rates by booking their own travel through on-line reservation systems.

B. Travel by Air

Memo

To: PHCS Employees

From: Human Resources Department

Date: August 2011

Re: Volume 5 Human Resources Policy Changes and Additions.

Amendments have been made to the Volume 4 - Human Resources Policies and Procedures to reflect current Preferred Health Care Services practices and legislative regulation changes, which are effective immediately.

In addition we have implemented new policies that have been added to the Volume 5 Policies and Procedure Manual.

You will find a summary document which highlights all of the changes to current policies and a brief summary of the new policies implemented. Please familiarize yourself with the changes and the additions by reading the summary document, the entirety of the new policies which you can access by contacting Christina Rizek, Recruitment & Employee Relations Analyst. If a specific policy is not included on the summary document then it did not require any major changes.

If you have any inquires or concerns, please direct them to your Manager or designate.

Thank you

Human Resources

Responsibility

مسؤولية حين كتابة ال
P and P ؟؟

Total quality management supervision & assistance

رؤساء الأقسام

It is the responsibility of each *Department Head* to develop policy and procedure within their scope of service

المنتسقة

The Department Head collaborate and coordinate inter-related departmental policies.

(e.g., Infection Control working with Nursing and Facilities).

وظيفته تقتصر على الاشراف و المساعدة

➢ TQM Department is responsible to provide assistance to the departments to develop their policy and procedures. (Support role)
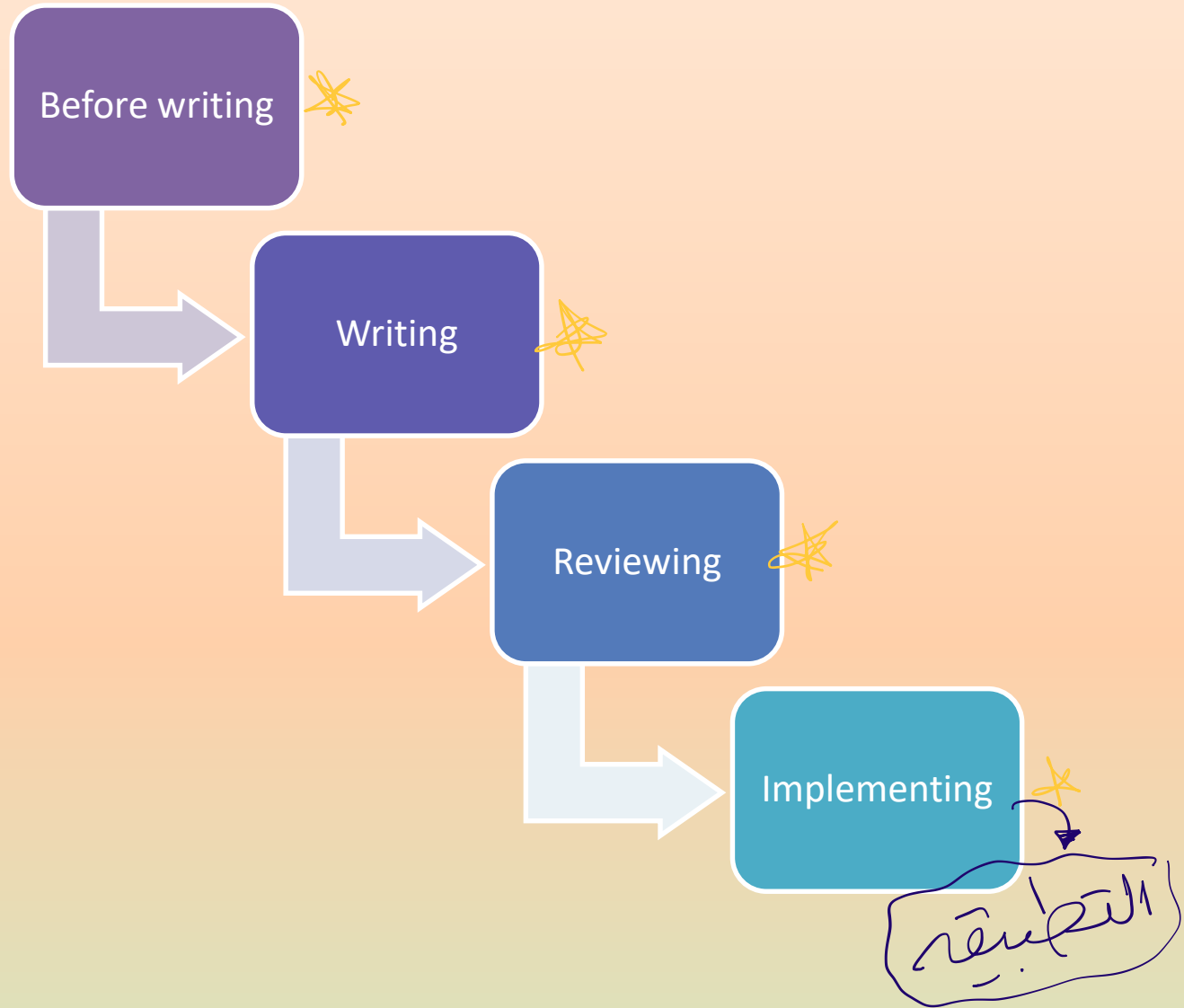
Approval Process:
Final policies require review by TQM and/or hospital leadership.

Documentation:
All policies must be archived for easy access and audits.

How Do You Formulate or Write a Policy?

How Do You Formulate or Write a Policy?

Before You Begin Writing Policies

Needs Assessment:

Identify the problem or gap requiring a policy (e.g., safety incident, regulatory change).

Consult stakeholders (staff, legal, IT) for input.

Research: استشارة المعنيين (ما) للمداخلات   كشف المتطلبات   مكشوفة السياسة الحالية

Review **existing** policies, and legal requirements.   بدنا نقيي ـــتي موجود ولانحدث؟

Define Scope & Objectives:

Clearly state what the policy will cover and its goals (e.g., "Reduce medication errors").

team meeting   ممكن نعمل

ونكتب وعيض ونشوفه شو موجود كنت والخ

review existing policies

P &P writing

- **Structure:** Use a standardized template with:
  - **Title:** Clear and specific , simple, recognizable name for the policy Hygiene Policy").
    (لحة الغل يقوم)
  - **Purpose:** Why the policy exists.
  - **Scope:** Who/what it applies to (e.g., "All clinical staff").
    (حد النظاقة)
  - **Definitions:** Key terms (e.g., Protected Health information"PHI" for privacy policies).
  - **Procedures:** Step-by-step instructions.
  - **Roles/Responsibilities:** Who enforces/complies with it.
  - **References:** Laws or standards cited.
- **Language:**
    (في شرح الخطوات تحت) *(يحس وفهم)*
  - Concise, active voice (e.g., "Staff must wash hands before patient contact").
    (مختصر)
  - Avoid jargon; use bullet points for readability.
  - Avoid Superlatives: (Replace subjective claims like "highest level of care" with measurable standards (e.g., "complies with CDC guidelines").
  - **Use Precise Verbs:** "promote," "monitor," or "document" instead of "ensure" (e.g., "to promote patient safety"). ✗ "Ensure all patients receive timely care" (Can you really guarantee this 100% of the time?) ✓ "Monitor wait times hourly and document delays exceeding 30 minutes"
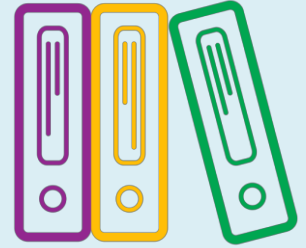   (Specific, measurable action)
    (استخدام الأفعال الدقيقة) *(حابتقدر تضمن شي 100%)*

* number all page

* put title on each page

* searchable files

* avoid Some words as _Ensure_ and _highese_ (Superlative)

استبدلها بـ
promote

unmeasurable تقولها

✻ دمج السياسات المبعثرة المواضيع في مستند واحد

- Combine/ merge separate policies on the same subject into one policy. If it becomes lengthy, create a table of contents so the user can easily locate specific sections.

- Ensure responsibility for carrying out each action step **is explicitly stated, not implied** صراحة وليس ضمنا

- **Create uniform naming and numbering for all system documents. Label each page "Page X of Y" and include the policy title and number in every header.**

✳ لوكان في تعليمات جديدة ←← يا بتكتب انوهاي التعليمات تلغي ماقبلها

أو تدمجهم مع بعض وتعملهم في **one documents** ← في مستند واحد

✳ في عبارات لازم تصينبها قبل highest/eL ✳ **unmegarble**

✳ إذا ايدنا نكتب ← مقارنة مع اشي ← قلنا أحنا ماشيين مع الـ ← **WHO Policy**

✳ تجنب كلمة Ensure ولكن يدالهانط **Pomote**

✳ نرقم الصفحات أوالنقاط ←حتى يعرف القارئ انوسا في Policy
بالصفحةالثانية قلنا

✳ منخطها بملفات **searchable** لحتى الي بدو يبحث على كلمة يلاقيها

4) Policy and Procedures writing include the following, EXCEPT?

C

Select one:

a. Definitions of all terms used within the policy

b. The policy title/number should be repeated in the header of each page C) c. Well written policies include the terms: Highest, safest. best

d. Responsibility for carrying out each action step should not be implied

e. Separate policies on the same subject can be combined in one policy

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6) Human Resource Management Policies include the following. EXCEPT?

D

Select one:

a. To ensure that the staff are complying with the rules and regulations of the organization

b. To improve the staff's skill sets as the primary focus of the department

c. Vacation days is an example

d. To control how a hospital shares its information → For information managment policy

e. shift policies are an example

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41) One of the following is considered Philosophical policies and procedures?

Select one:

① Ethics ② vision ③ communcation

B

a. Strict code of privacy

b. Positive relations with people both inside and outside the organization

c. Tasks to each individual

d. What the staff should wear

e. Security policies

12) Look at attached figure of this document and Choose the correct answer?

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Human Resources

C

Select one:

a. Describes long and detailed procedure

b. Describes values, philosophy of the organization

c. Used to assign responsibilities to someone to perform a task ⟶ *delegation*

d. For communication with outside the organization

e. Should be directed to headquarters accounting and finance department 17

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56) Your hospital uses a document containing Diabetes adult evaluation recommended actions based on the latest evidence, this document is an example of?

Select one:

a. Protocol

b. Procedure

c. Policy

d. Guidelines

e. Memo

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60) Before You Begin Writing Policies, You should do the following, EXCEPT?

Select one:

a. Establish a format

b. Ignore the already used policies

c. You need to assign group of people to do it ✓

d. Review accreditation standards ✓

e. Clearly define the problem ✓

B

40) Formalized, written policies and procedures fulfill the following purposes. EXCEPT? Select one:
a Less variation in practice across the health system
b. More adherence to professional practice
c. More understanding of roles and responsibilities
X d. More reliance on good memory
e. More adherence to accreditation requirements

D

23) Your organization uses a document containing blood-testing recommendations for patients who are taking anticoagulants. This document is an example of?
Select one:
a. protocol
b. Procedure
c. Policy
d. Guidelines
e. Memo

D

55) Choose the correct answer about a Memo?
Select one:
a. Should be long and detailed
b. For legal use
c. For external use
d. Used to give authority to someone to perform a task
e. Typically contains From, To, Date, subject at the bottom at the memo

D

delegation نفس جدة الا

42) One of the following is considered Philosophical policies and procedures? مكرر
Select one:
a. Positive relations with people both inside and outside the organization
b. Strict code of privacy
c. improve the staff's skill
d. What the staff should wear
e. Security policies

(A)

44) One match is correct?
Select one:
a. Procedure—Details
b. Policy—How
c. Policy—Changes frequently
d. Policy—Process
e. Procedure —Broad terms

(A)

الحمد لله

Done by: NOOR Mahmood