SACVALLEY MEDSHARE	PROCEDURE: *Policy, Procedure, Forms Procedure*	PROCEDURE NUMBER: *SVMS-PRO-008.001*
	Author: Elizabeth L Steffen	Origination Date: 11/05/2015
	Revised By:	Revised Date:

Procedure for Policies, Procedures, Forms & Auditing:

1. **Policies**
   a. When new policies are identified, the requirements will be brought to the development/oversight committee for structure and content and vetted, voted, and sent on to board for approval.
   b. When policies need revisions, those revisions will be done, sent to the development/oversight committee, and vetted, voted, and sent on to board for approval.
   c. Policies will use established templates and numbering conventions.
2. **Procedures**
   a. When new procedures are identified as needed, they shall be brought to the development/oversight committee for structure and content and vetted, voted, and sent on to board for approval.
   b. When procedures need revisions, those revisions will be done, sent to the development/oversight committee, and vetted, voted, and sent on to board for approval.
   c. Procedures will use established templates and numbering conventions.
3. **Forms**
   a. When new forms are needed, they will be drafted and sent to the development/oversight committee, and vetted, voted, and sent to board for approval.
   b. When forms need revisions, those revisions will be done, sent to the development/oversight committee, and vetted, voted, and sent on to board for approval.
   c. Forms will use established templates and numbering conventions.
4. **Audits**
   a. All policies, procedures, forms will be audited annually and the above steps 1-3 will be followed for anything needing updating.
   b. The *Annual Policy Review* template will be used for this auditing procedure (Attachment A).

Authorization	Name	Signature	Date
Board Chair	Myron Machula		12·3·15
Executive Director			

Attachment(s):

A: *Annual Policy Review Template (3 pages) (page 2)*

Version	Date	Author	Comment
.001	12/03/2015	E. Steffen	Initial release.

Attachment A: Annual Policy Review Template – Page 1

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Authorization	Name	Signature	Date
Board Chair			
Compliance Officer			
Executive Director			

Policies

Policy Number	Policy Name	Notes
SVMS-01.001	Amendment of Data	
SVMS-02.001	Compliance with Law and Policy	
SVMS-03.001	Governance	
SVMS-04.001	Individual Participation and Control of Information Posted to ICA	
SVMS-05.001	Information Subject to Special Protection	
SVMS-06.001	Minimum Necessary	
SVMS-07.001	Mitigation	
SVMS-08.001	Notice of Privacy Practices & Consent	
SVMS-10.001	Uses and Disclosures of Health Information	
SVMS-11.001	Workforce, Agents, and Contractors	
SVMS-12.001	Patient's Access to Their Own Health Information	
SVMS-13.001	Authentication of System Users	
SVMS-14.001	Auditing of Access to and Use of HIE Information	
SVMS-15.001	Correctly Matching Patients to Their Records	
SVMS-16.001	Breaches of Protected Health Information	
SVMS-17.001	Policy, Procedure, Forms: Document Consistency and Audit Requirement	
SVMS-18.001	System Security Practices	
	Conflict of Interest Policy	

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Attachment A: Annual Policy Review Template – Page 2

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Procedures

Procedure Number	Procedure Name	Notes
SVMS-PRO-001.001	Marketing Procedure	
SVMS-PRO-002.001	Notice of Privacy Practices and Consent Procedure	
SVMS-PRO-003.001	Breaches of Protected Health Information/ Incident Response Procedure	
SVMS-PRO-004.001	Authorized User Access Procedure	
SVMS-PRO-005.001	Use and Disclosures of Health Information Procedure	
SVMS-PRO-006.001	Participant Notices: Address and Delivery Processing and Tracking Procedure	
SVMS-PRO-007.001	Information Subject to Special Protection Procedure	
SVMS-PRO-008.001	Policy, Procedure, Forms Procedure	
SVMS-PRO-010.001	Amendment/Correction of Data Procedure	
SVMS-PRO-011.001	Individual Participation and Control of Information Available Through the HIE Procedure	
SVMS-PRO-012.001	Hiring Procedure	

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Attachment A: Annual Policy Review Template – Page 3

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Forms (to be filled in upon review)

Form Number	Form Name	Notes