

Quality resources

Document control tools

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1. The document template

One of the first steps in getting a document control process running is to have a standardised template. Use of this from the start helps avoid a need to standardise later & ensures that current assessment requirements are met.

This resource pack includes a blank and completed copy of a document template.

A key thing of note on this template is that it has a watermark of 'draft', please ensure you remove this before using it as part of any finalised documentation.

The template includes a footer which will auto-populate the rest of the document. An example layout of how to standardise footer information is included. Document ID is given as a suggested option to help in document management but is not compulsory. All other aspects of the footer should be retained to support in compliance to accreditation criteria.

When starting to use the template it is also important to make sure that things like dates are used in a standard fashion across all documentation. The template shows suggested formats for this, and other factors in brackets [].

When filling in a cover page please ensure the details are accurate and in sync with any other information relating to it e.g. if the document has a target audience of 'All staff' but on the document list states 'All Clinical staff' you will need to check which is accurate & correct it.

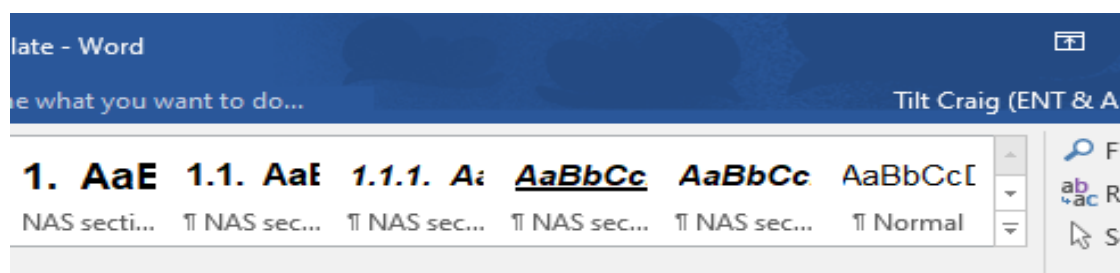
The contents page can be updated by clicking on the top left corner:



Clicking 'update table' will give the option of page numbers only or the whole table. After first creating a document update the whole table for all your sections to be displayed. From there you can update page numbers as appropriate.

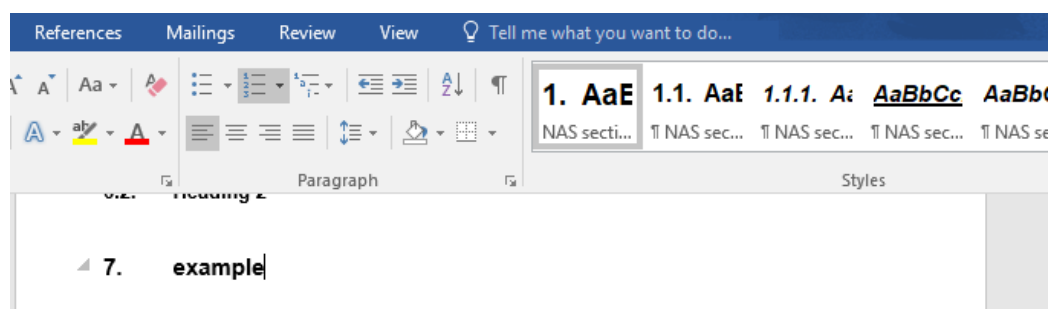
This table is linked to the formatting throughout, any inconsistencies in the formatting may show up in this contents page, so please make sure you fully inspect the document before launching it.

New sections, sub-sections and further can be added through the 'home' tab on MS word:



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e.g. clicking the main section adds a new one:



The bulk of the document has prompts for what each section should contain. A worked version can also be found in this resource pack so you can see it in practice.

Following the main body of the document this template includes sections which may or may not be relevant to you and can be removed as required – you may wish to refer to your own Trusts document standards first.

These sections are EQIA, Values & behaviours and a monitoring matrix.

Following these there are spaces for references and appendices as required.

To help prevent accidental changes to documentation when completed you may wish to save finalised documents as PDFs or password protect the word version.

2. The document database

To support in managing your documentation, this resource pack includes a simple document list.

This list is populated with formula and drop-downs to help you get going.

The 'start' tab of this tool contains a concise breakdown of its functions and a description of what each column on the 'database' tab is intended for.

Before you can put the tool into use you will need to define the following:

- What types of documents the list will cover e.g. Policies, Procedures etc
- What your key readership groups are e.g. All staff, all Clinical staff, Admin only etc.

There are spaces on the 'start' tab to input these, after which the drop downs on the 'database' tab will become useable.

The document list flags documents which are due for and overdue review. Time scales for 'start review' and 'review due' can be altered on the 'start' tab.

Information on the 'database' tab is broken down into several key sections:

- A-J shows the 'current' information of the document
- K-M shows its status in relation to its expiry/review date

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- N-U cover the document review process
- V-X relate to the new version of the document
- Y-AD are for the previous version
- AE-AG are for use if a document is retired

The rationale behind the process can be found in the accompanying quality development documentation.

A worked example of the document list can be found in this resource pack to show what it looks like in action.

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