# Healthcare Policy, Procedure, and Document Control Training Course

31 January – 4 February 2027
Chicago

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# Healthcare Policy, Procedure, and Document Control Training Course

**Ref:** 1467_208311 **Date:** 31 January – 4 February 2027 **Location:** Chicago **Fees:** 12000 Euro

## Overview

Healthcare Policy, Procedure, and Document Control Training Course is a one-week foundation course for policy coordinators, quality staff, department supervisors, document controllers, and healthcare administrators who leave with a Healthcare Controlled Document Pack. Participants apply policy and procedure management, document hierarchy, drafting conventions, review and approval workflows, version control, controlled distribution, periodic review, and archiving to fictional healthcare scenarios. Agile Leaders Training Center presents healthcare document control as a practical governance discipline.

## Who Should Attend

- Teams responsible for healthcare policy and procedure management
- Personnel responsible for drafting and maintaining procedural documents
- Supervisors responsible for document ownership and scheduled reviews
- Quality teams responsible for approval evidence and audit readiness
- Administrators responsible for document registers, access, and distribution

The course assumes participants create, review, approve, distribute, or monitor workplace documents and leaves out clinical diagnosis, treatment decisions, legal interpretation, regulatory advice, and system configuration.

## Departments and Industries

The course supports departments and industries that govern policies, procedures, work instructions, forms, and controlled records.

- Hospital quality and clinical-governance departments
- Outpatient, diagnostic, and rehabilitation services
- Community health and medical-support organizations
- Health insurance administration functions
- Social care and assisted-living operations

## Learning Objectives

By the end of this course, participants will be able to:

- Apply a document hierarchy to policies, procedures, instructions, and forms
- Build ownership, drafting, review, and approval controls
- Use version histories, change logs, and document registers
- Analyze access, distribution, and acknowledgement evidence
- Evaluate periodic review, retirement, retention, and archiving decisions
- Build an audit-ready controlled-document file

## Course Agenda

### Day 1: Document Governance Foundations

- Healthcare Document Hierarchy Map
- Policy, Procedure, Work Instruction, and Form Classification Guide
- Document Purpose and Scope Definition Canvas
- Document Owner and Author Responsibility Matrix
- Controlled Document Lifecycle Model

### Day 2: Drafting and Approval Controls

- Policy and Procedure Drafting Checklist
- Document Identification and Metadata Standard
- Stakeholder Consultation Record
- Review and Approval Workflow Diagram
- Approval Evidence File Index

### Day 3: Versions, Access, and Distribution

- Version Numbering Convention
- Document Revision and Change Log
- Master Document Register
- Access and Distribution Control Matrix
- Staff Acknowledgement Tracking Sheet

### Day 4: Review, Retirement, and Assurance

- Periodic Review Schedule
- Early Review Trigger Checklist
- Superseded Document Withdrawal Method
- Retention, Disposition, and Archive Decision Table
- Document Control Audit Evidence Checklist

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## Day 5: Healthcare Document Control Practice

- Suggested Exercise: Document Hierarchy Classification
- Suggested Exercise: Drafting and Approval Route Design
- Suggested Exercise: Version and Distribution Control Review
- Suggested Exercise: Retirement and Archive Decision
- Capstone Exercise: Healthcare Controlled Document Pack

## Practical Exercises

The course uses suggested activities with fictional hospital, outpatient, insurance, community-health, and social-care documents.

- Suggested activity: classify a policy, procedure, work instruction, and form within a healthcare document hierarchy.
- Suggested activity: draft ownership, consultation, review, approval, and publication controls for a procedural document.
- Suggested activity: reconcile a document register with version histories, access lists, distribution records, and acknowledgements.
- Suggested activity: assemble review, withdrawal, retention, archiving, and audit evidence into a controlled-document pack.

## FAQs

### Who suits healthcare policy and document control training, and what does it assume?

Healthcare policy and document control training suits coordinators, quality staff, supervisors, document controllers, and administrators. It assumes routine responsibility for workplace documents and does not require clinical or legal authority.

### How does healthcare document control differ from general records management training?

Healthcare document control focuses on governing active policies, procedures, instructions, and forms, while general records management training covers a wider range of retained organizational records and evidence.

### What belongs in a healthcare controlled document register?

A healthcare controlled document register typically identifies the document, owner, current version, approval status, publication location, review point, access arrangements, and retirement status needed for local control.

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## How does version control support healthcare policies and procedures?

Version control distinguishes the approved issue from drafts and superseded copies, records changes, supports accurate distribution, and helps teams confirm that the applicable document is available where work occurs.

## What evidence supports healthcare policy review and approval?

Healthcare policy review and approval evidence can include ownership records, consultation comments, change logs, approval decisions, publication checks, distribution records, acknowledgement tracking, and scheduled review entries.

## Conclusion

Participants leave with a Healthcare Controlled Document Pack containing a hierarchy, ownership matrix, drafting checklist, approval route, version log, register, distribution matrix, review schedule, archive decisions, and audit evidence index. The pack converts scattered documentation tasks into a controlled lifecycle. It supports clearer accountability, current versions, traceable decisions, and orderly retirement.