



Getting the best from the IM / IT Security Policy and Procedures template

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IMPORTANT NOTE

Unless you are conversant with most things IT – do NOT try to complete this template alone.

You SHOULD have your **IT contractor** present or on the phone to complete this template.

It is appropriate that your IT contractor will complete much of the technical aspects of this template. Once complete you simply need to keep it up to date.

EVERY PART OF THIS TEMPLATE IS ONLY A SUGGESTION ON WHAT TO DO OR HOW TO DO IT – IT DOES NOT MEAN YOU CHANGE YOUR CURRENT WAY OF DOING THINGS TO CONFORM TO THIS TEMPLATE.

CHANGE THE TEMPLATE TO REFLECT THE CURRENT WAY YOU ARE DOING THINGS – AS LONG AS THIS DOES NOT COMPROMISE SECURITY.

IF YOU FEEL THE TEMPLATE REFLECTS A BETTER PROCESS AND YOU WANT TO CHANGE TO IT – BY ALL MEANS DO SO.

Not all circumstances of all practices can be accounted for in the creation of a template.

In order to make this template work for you need to

- Edit this template
- Add words, wording, lines, descriptions additional explanations or commentary or clarifications that are appropriate for your practice
- Delete anything that is inappropriate for your practice
- Change amend and edit this template to fit your practice and the way you want to do things

You may choose to introduce new process and new procedure as a result of what you learn from this document and what you choose to implement from this document or you may choose to delete or discard entire sections of this template. Either way the decisions and the consequences are yours.

This template tries to guide practices in safe and secure processes and offer guidelines on best practice. This may not always be possible or affordable – you have to find the blend that suits you.

There is some text offered as guidelines and examples in this document – they are designed to be deleted from the final document. *Text that appears in this font and style and colour is intended to be deleted from the final document.*

There is also some example data ‘filled in’ into the relevant areas. You MUST delete / change this data or you will find that ‘Burt Lancaster’ is assigned to do you backups. These examples demonstrate the type of data you may want to place in these areas.

This template was designed to be updated and edited electronically via MS Word. Open the document in MS Word, edit it and then print the final copy.

The template is designed for implementation in 2 parts

Part 1 – This template / document in its entirety is a complete document that describes the IT security policy and procedures for the practice. As a complete document however it will contain information that is not intended for some practice staff or to be left out in an unsecured location. As such, once complete the practice manager / security coordinator should ensure this document is kept in the fireproof safe and a copy kept secure offsite.

Part 2 – Create a disaster recovery process from components of this document.

- Buy a large plastic box that can house a variety of things
- Identify this box to ALL staff as the ‘Manual Systems Box’
- Place this box in the front desk area, perhaps under the front desk, in a cupboard at the front desk. In a place that is not locked but still secure and that ALL staff have access to.

Place the following in this box

- From the practice technology policy document – Print the following sections
 - Disaster recovery process – Appendix D – entire appendix
 - Backup Policy and Procedures – Appendix E – just the section on ‘Restoring files after a disaster’
- Purchase / place in the box all the relevant items mentioned in the Disaster recovery document
- Place in this box any other items you feel will be important in ensuring the continued operation of the practice in the event of a server crash or other technology based disaster. (pens, exercise books, rubber stamps, receipts, contact lists etc)

Appendix C contains a ‘New Staff – IT Form’ - this form will require a complete change of information to reflect the environment at your practice. Once this form is updated you can print it and present it to any new staff or GP that commences at the practice. It should contain information about how you operate, how you want them to operate, what equipment, policy and process is used at the practice and helps them conform to practice policy when they first start. Practices should modify and make the best use of this form.