Policy 0000 [Number] [Policy Name] Draft

Responsible Office
Responsible Official

Effective Date
Last Revision

Policy Sections
3301.1 Authorized Travel ................................................................. 2
0000.2 Name of Section ................................................................. 2
0000.3 Name of Section ................................................................. 3

Scope
Each policy is broken down into topics and sections. The topics are the main areas of the policy. There are 12 topics: Scope, Policy Statement, Reason for the Policy, etc. Each topic is identified in this document by a **Heading 4** style with **Policy Sections** as the exception. When entering the topic information into this word template, you do not need to change the heading. Just enter the text that describes the scope of the policy in the area below.

The text used to define the topic is entered directly below the **Heading 4** style. The style used for the text is **Body Text**. To enter the text in this page, select the paragraph of text in this area and replace it with the text for the policy you are working with. Be sure to check that the style for this paragraph is **Body Text**. If not, then select the entire paragraph and select **Body Text** from the **Styles** pull-down menu.

Policy Statement
Use the **Policy Statement** heading and add text that defines the reason for the policy in the paragraph below. Be sure to check that the style for this paragraph is **Body Text**. If not, then select the entire paragraph and select **Body Text** from the **Styles** pull-down menu.

Reason for the Policy
Use the **Reason for the Policy** heading and add text that defines the reason for the policy in the paragraph below. Be sure to check that the style for this paragraph is **Body Text**. If not, then select the entire paragraph and select **Body Text** from the **Styles** pull-down menu.

Definitions
Definitions are used to define terms that are related to the policy or unique to University language. See example below, Domestic Travel.

**Term Name** [Definition Title]
Definition [Definition Text]. You can eliminate the space between the 2 lines of text by holding down the **SHIFT** key and pressing the **ENTER** key. You will then need to apply the **Body Text** style without bold to this line.

**Example: Domestic Travel**
Any travel within and between any of the 50 states of the United States and its possessions and territories. Domestic travel also includes travel between the United States and Canada, and within Canada.
Policy Sections
The Policy Sections area is broken down into the various sections that make up the policy. These sections are formatted differently from other topics and require the use of different styles. The instructions below describe how to handle the sections.

3301.1 Authorized Travel [Heading 2]
This is the first policy section in the Traveling on University Business policy. It is identified by the policy number (3301) and the section number (.1). The style used for the policy section heading is Heading 2. Using this heading ensures that this information will show up in the table of contents.

The paragraph text that you are reading now is called the Policy Section Text style. This style lines up directly underneath the Heading 3 that identifies the policy section.

A. Air Travel [Section Head]

First Class and Business Class Transportation [Section Head]
Sometimes the policy section is itself broken down into parts. There are two types of headings that identify these parts. Section Head is used regardless of the heading type. (See example above)

When a numbered bullet is used in the policy section area of the policy, you must format it in the following way:

Numbered Lists
Use the Section Numbered List for numbered lists.

1. The first item in a numbered item list must be created manually.
   • enter the number 1 and a period (.)
   • press the Tab key
   • enter text
   • apply the Section Numbered List style.
     o To add another item in the numbered list, just hit the Enter key. The numbers will display sequentially.

Bulleted Lists
When a bulleted list is used in the policy section area of the policy, use the Section Bullet style. (See example below).

• require circuitous routing,
• require travel during unreasonable hours,
• excessively prolong travel,
• greatly increase the duration of the flight,
• result in increased costs that would offset transportation savings,
• be inadequate for the medical needs of the traveler.
  o Sometimes you may need a bullet under a bullet in a policy section. In this case, use the Section Bullet 2 style.
0000.2 Name of Section
Text related to the section.

0000.3 Name of Section
Text related to the section.

<table>
<thead>
<tr>
<th>Table Head</th>
<th>Table Head</th>
</tr>
</thead>
<tbody>
<tr>
<td>Table Text</td>
<td>Table Text</td>
</tr>
<tr>
<td></td>
<td>Table Text</td>
</tr>
<tr>
<td>Table Text</td>
<td>Table Text</td>
</tr>
<tr>
<td>Table Text</td>
<td>system-generated for orders over $1,000</td>
</tr>
<tr>
<td>Table Text</td>
<td>Table Text</td>
</tr>
</tbody>
</table>

**Special Situations/Exceptions**

Exceptions to policy on Travel Involving Family Members and Others
- If a sub-heading is used with a policy topic, use the Heading 3 style.
- If there is a bullet is used, use the Bullet style.
  - Sometimes you may need a bullet under a bullet. In this case, use the Bullet 2 style.

**Related Information**

Policy 0000: (A policy related to this policy.)

Procedure 0000: Upcoming Procedure *(forthcoming)* If the document does not exist, forthcoming should follow this format.

0000.GD.01 - Name of an exhibit related to the policy.

0000.FR.01 - Name of a form related to the policy.

**Contacts**

Use the following styles when creating a table. While all tables do not require the above formatting, tables with a heading at the top of the column should be formatted accordingly.

- To create the shaded area, just select the heading row, and then go to the Format/Borders and Shading/Shading tab. Click on the second gray box in the second (20%).
- To create the borders, just select the whole table and click on the Border icon that indicates all cell boundaries should have a border.
<table>
<thead>
<tr>
<th>Subject</th>
<th>Contact</th>
<th>Phone</th>
</tr>
</thead>
<tbody>
<tr>
<td>Purchasing card</td>
<td>Manager of Electronic Commerce</td>
<td>432-0000</td>
</tr>
<tr>
<td>Purchasing</td>
<td>Associate Directors of Purchasing</td>
<td>432-0000</td>
</tr>
<tr>
<td>Accounts payable</td>
<td>Manager of Accounts Payable</td>
<td>432-0000</td>
</tr>
<tr>
<td>Vendor setup</td>
<td>Vendor Compliance Unit</td>
<td>432-0000</td>
</tr>
</tbody>
</table>

**Roles and Responsibilities**

Job titles and business offices directly involved in the practices related to the policy.

**Provost / Associate or Deputy Provost**

(blah blah blah)

**Vice President for Finance**

(blah blah blah)

**Office of Grant and Contract Administration**

(blah blah blah)

**Yale Travel Services**

(blah blah blah)

**Accounts Payable Office**

(blah blah blah)

**Department Administrator**

(blah blah blah)

**Revision History**

Enter a list of revisions that have been made to the policy (if applicable).

The official version of this information will only be maintained in an on-line web format. Any and all printed copies of this material are dated as of the print date. Please make certain to review the material on-line prior to placing reliance on a dated printed version.