

IMPORTANT: Please **do not** edit or remove the headings or other content in this template except in the editable fields. If you do not have content for a particular section/field, simply leave that section/field blank.

Responsible Office: Enter responsible office name. *(required)*

General instructions:

- In developing policy content, follow the principles of Plain Language. These principles center on the idea that readers should understand a document’s content the first time they read it (see www.plainlanguage.gov for more detail).
- Consider the broad (general) university audience as the reader.
- Spell out all acronyms on first reference.
- Do not change the styles (fonts, formatting, etc.) used in this template. They align with the styles established for all content in the UW–Madison Policy Library to ensure consistency.
- Do not edit or remove the headings or other content in this template except in the editable fields. If you do not have content for a particular section/field, simply leave that section/field blank.

For questions about or assistance in completing this template, please email the policy library coordinator at policylibrarycoordinator@wisc.edu.

Enter policy title. *(required)*

Search the policy library to ensure the policy title is unique. Do not include any form of the institution name (e.g., UW–Madison, University of Wisconsin–Madison, or UW) or the word “policy” in the title (the template and policy number already indicate that it is university policy). For guidance on creating or revising a policy title, refer to the [Style Guide for Writing University-Wide Policies](#).

Rationale/Purpose of the Policy

Add a brief summary of the policy’s primary objectives. *(optional)*

When applicable, include the need for the policy as part of the rationale/purpose (e.g., to meet federal or state statutory requirements, to meet some other critical need, etc.).

Definitions

Add explanations of key terms or concepts specific to the policy. *(optional)*

Include definitions of key terms that the reader needs to understand in order to comply with the policy. List key terms in alphabetical order.

Each key term should start with a capital letter and be bolded, then followed by a colon and the definition, which should also start with a capital letter. Do not number or bullet key terms. Do not repeat the key term in the definition (e.g., “**Remote work** – Remote work is...”). Example:

Term a: Definition a

Term b: Definition b

Term c: Definition c

Scope

Add a general statement about who and/or what the policy applies to. *(optional)*

List groups who must know and adhere to the policy. In the absence of a scope statement, the policy is assumed to apply to all members of the UW–Madison community (including, but not necessarily limited to faculty, staff, students, users, and visitors).

Policy Details

Add the content of the policy. *(required)*

As part of the policy details, address conditions and restrictions of the policy, as well as any exclusions or exceptions. Do **not** include the steps or processes for implementing or complying with the policy as part of the policy details; those should be covered in separate procedures.

Within the policy details section, add numbering and lettering to headings, subheadings, and main concepts, as well as **ordered lists**, using the following order for formatting:

- I. Level 1 (*uppercase Roman numeral*)
 - A. Level 2 (*uppercase letter*)
 1. Level 3 (*Arabic numeral*)
 - a. Level 4 (*lowercase letter*)
 - i. Level 5 (*lowercase Roman numeral*)

For example, if your policy has sections with the headings Policy Statement, Policy Detail, Restrictions, and Exclusions or Exceptions, each of those headings would be a Level 1 (uppercase Roman numeral).

For **unordered lists** within the policy details section, use bullets in the following order and format:

- Level 1 (*filled circle*)
 - Level 2 (*open circle*)
 - Level 3 (*filled square*)
 - All deeper levels use filled square by default.

Related UW–Madison Policies

List and provide the URL for any other UW–Madison policies that are closely related to the policy itself and may need to be known to users of the policy. *(optional)*

First, list all related **university-wide** policies in numeric order. Include the policy number and title, with no comma in between (e.g., UW-5059 Voting and Serving as an Election Official). Put a comma after the policy number and title and then type out (or copy and paste) the URL. Examples:

Policy a number and title, URL
Policy b number and title, URL
Policy c number and title, URL

Once you've listed all related university-wide policies, then list any related **school/college/division-level** policies, either in numeric order (if they have their own numbering) or alphabetically.

If you are unsure which policies to list here—or whether a specific policy should be included—please contact the policy library coordinator at policylibrarycoordinator@wisc.edu.

Related UW–Madison Documents, Web Pages, or Other Resources

List and provide the link (for a PDF, Word document, etc.) or URL for any related UW–Madison documents, web pages, or other resources that provide relevant information and may be necessary to ensure compliance with the policy. *(optional)*

List related documents, web pages, and other resources alphabetically. Ensure that the title you list matches the title on the document, web page, or other resource. Put a comma after the title and then type out (or copy and paste) the link or URL. Examples:

Document a, link or URL
Document b, link or URL
Document c, link or URL

If you are unsure which documents, web pages, or other resources to list here—or whether a specific item should be included—please contact the policy library coordinator at policylibrarycoordinator@wisc.edu.

External References

List and provide the URL for any federal/state laws or regulations or any Board of Regents or UW System policies that mandate, authorize, or otherwise affect this policy. *(optional)*

List external references alphabetically. Use concise, descriptive, and meaningful names for external references. Put a comma after the name of the reference, and then type out (or copy and paste) the URL. Example:

Reference a, URL
Reference b, URL
Reference c, URL

If you are unsure which external references to list here—or whether a specific reference should be included—please contact the policy library coordinator at policylibrarycoordinator@wisc.edu.

Policy Administration

Approval Authority

Indicate the position or office with the right to issue, approve, or enforce the policy. *(required)*

Indicate a **single** position title.

There may other positions or bodies (e.g., groups, committees, etc.) that concur with the policy. You may list the titles of these concurring positions or bodies below the approval authority position title. Add a subheading above the list to clearly distinguish it from the approval authority (e.g., **Concurring Positions or Bodies**). Concurring positions or bodies will be tracked by the library software but will not be displayed in the public-facing version of the policy.

Policy Manager

Indicate the position (and by extension the incumbent in a position) responsible for the development and administration of the policy. *(required)*

Administration of policy includes policy interpretation and enforcement, as well as related procedures, processes, instructions, forms, and revisions. Depending on the scope of the subject matter, a policy may have more than one policy manager. If the policy has more than one policy manager, list the positions of all of them.

Policy Contact(s)

Enter the information requested below for each individual who serves as a point of contact to answer questions on the policy and assist in interpretation of the policy. *(at least one policy contact is required; all information is required for each policy contact listed)*

Policy contact's position title.	Policy contact's position title.	Policy contact's position title.
Policy contact's full name.	Policy contact's full name.	Policy contact's full name.
Policy contact's email address. A shared email address may be used.	Policy contact's email address. A shared email address may be used.	Policy contact's email address. A shared email address may be used.
Policy contact's phone number.	Policy contact's phone number.	Policy contact's phone number.

The policy contact is usually the subject matter expert designated by the Responsible Office.

Policy History	
Effective Date	Select the date the policy goes (or went) into effect. <i>(required)</i> The effective date can be a past, present, or future date.
Date Issued	Select the original date the policy was released to the university as approved. <i>(optional)</i> If no date is indicated here, the issuance date will be assumed to be the same as the effective date.
End Date	Select the date the policy is no longer in effect. <i>(optional)</i> If there is no end date indicated, then the policy is considered to still be in effect.
Next Review	Select the date the policy is next scheduled for review. <i>(optional)</i> The policy should be reviewed periodically to ensure currency with governing laws, rules, regulations, policies, and technologies. Review must be appropriate to the type and nature of the document and sufficient to comply with governing laws, rules, and regulations.

Revised Dates

List all the dates the policy was revised, using MM/DD/YYYY format. *(optional)*

List all dates chronologically in the format indicated.

Reviewed Dates

List all the dates the policy was reviewed, using MM/DD/YYYY format. *(optional)*

List all dates chronologically in the format indicated.