

Instructions for Developing An Official University Policy Using The Word Template

When you open the Policy Template, you should complete the various boxes in the header at the top of the page. In order to work in the header, you must “*double-click*” anywhere on the box.

Please note that the Policy No. will be assigned by the Comptroller’s Office once the Policy has received final approval.

When you have entered all the required information in the header, you can start working on the body of the document, by “*double-clicking*” below the header.

There are two options to enable you to shift levels in preparing a policy.

Option 1 – To shift levels when entering information under the various section titles (such as Purpose or Scope), you use your **Tab** key or your **Enter** key. The **Tab** key will move your cursor and numbering to the right, while the **Enter** key will move your cursor and numbering to the left.

The following is an example of using the **Tab** key:

1. Purpose
 - 1.1. This shift in levels was accomplished by hitting the “Enter” key after the word “Purpose” which prompted the number “2” to appear, and then hitting the “**Tab**” key which creates the number “1.1”

The following is an example of using the **Enter** key:

- 1.1. If you have completed entering all the information at this level, hit the “**Enter**” key which will prompt the number “1.2”. Then hit the “**Enter**” key again which will create the number “2”.
- 2.

However, this method doesn’t work on all computers so there is another option for you.

Option 2 -To shift levels when entering information under the various section titles (such as Purpose or Scope), you use two of the buttons in the top right-hand corner of the **Paragraph** box under the **Home** tab. The buttons are called **Decrease Indent** which moves your cursor (and thus, the numbering) to the left, and **Increase Indent**, which will move your cursor to the right.

The following is an example of **Increase Indent**:

2. Purpose

- 2.1. This shift in levels was accomplished by hitting the “Enter” key after the word “Purpose” which prompted the number “2” to appear, and then hitting the “**Increase Indent**” button which creates the number “1.1”

The following is an example of **Decrease Indent**:

- 2.1. If you have completed entering all the information at this level, hit the “Enter” key which will prompt the number “1.2” to appear, and then hit the “**Decrease Indent**” button which will create the number “3”.
- 3.

Please note that the “*Definitions*” and “*Responsibilities*” sections are optional, while the rest are all required.

Also, we request that you use only “*numbered lists*” and not “*lettered lists – a,b,c,d, etc.*” in official university policies.

And finally, please ensure that the “*Policy Title*” appears in the header on all pages of your policy.