
Policy
Formatting
Guidelines for
Services
(Word 2013)

1. General Formatting Guidelines

- 1.1. Formatting in this context refers to the method of organising the text in a policy document.
- 1.2. There is no one correct way to format a policy; use the method that works best for your service.
- 1.3. The purpose of formatting is to visually organise and structure the content of a policy so that:
 - 1.3.1. Information in the policy is easy to access for those reading it
 - 1.3.2. There is clarity, structure and organisation of the information in the document
- 1.4. This can be done through:
 - 1.4.1. Using clear headings as signposts throughout the document
 - 1.4.2. Using a consistent format throughout the individual document as outlined below, and across the service's policy library
- 1.5. The guidelines below are based on Microsoft Word 2013. For services using a different version of Word, there may be some variation.
- 1.6. Please note that this is a brief guide to some formatting issues that may be encountered when adapting policy templates from the policy template library on drugs.ie.

2. Font Colours

- 2.1. Three font colours are used in the policy templates
- 2.2. Each font colour communicates a different instruction to the reader:
 - 2.2.1. **Font in blue refers to additional information communicated directly to the reader**
 - 2.2.2. **Font in red should be amended by the organisation to reflect local information and practice**
 - 2.2.3. Font in black should be reviewed and changed to suit the service if necessary.

3. Font Style and Size


- 3.1. The font used in the policy templates is 'corbel'.
- 3.2. For section headings, text is 'bold' and size 12.
- 3.3. For the body of text, text size is 10.

4. Header

- 4.1. A header is the title bar that appears at the top of each page which is separate from the text. It includes the project name and the name of the policy
- 4.2. Each service should put the name of their service into the header. This can be done by
 - 4.2.1. Double clicking on the green section of the header box and writing the service's name in the green box.
 - 4.2.2. Once done on one page the header on every page will change

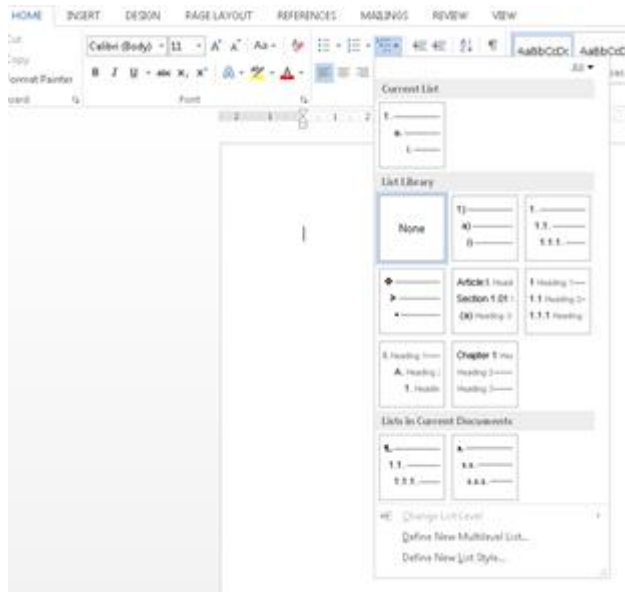
5. Formatting Copied & Pasted Text from Another Document

- 5.1. Where a large chunk of text is copied from another document such as a pre-existing policy or service website, the formatting is generally copied too. This may or may not cause some difficulties in the new document. To prevent this:
 - 5.1.1. Right-mouse click in the area where the new text is to be placed
 - 5.1.2. On the menu bar that appears, under 'Paste Options' choose 'Keep text only' option

 (Keep text only)

6. Numbering

- 6.1. Policies follow a numbered outline.
- 6.2. Select the text or paragraph you wish to number
- 6.3. On the 'home' menu bar, select the 'multilevel list' option
- 6.4. Select the 'current list' option to use the existing format



6.5. To move in to a sub point (from 1 to 1.1), select the 'Increase indent' option on the 'Home' menu



bar

6.6. To move back out from a sub-point to the main list of points (from 1.1 to 1), select the 'Decrease

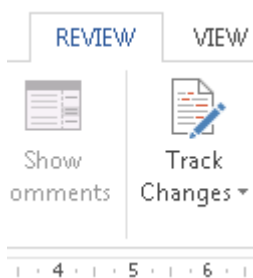
indent' button on the 'Home' menu bar



7. Track Changes

7.1. This function can be used to document changes made to policies so that both the original and the changed text are visible. This may be useful to show changes to others that have been made or changes being proposed.

7.2. To track change, select 'Track changes' from the 'Review' menu option. Alternatively, pressing the Control, Shift and E keys at the same time will enable track changes.

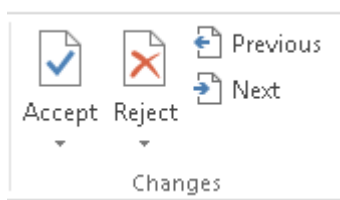


7.3. Occasionally when editing a document 'Tracked Changes' appear as comments on the right hand margin (see example below) or the text may appear in a different colour with a line under it.



7.4. To accept changes, select the 'Accept' option in the 'Review' menu bar.

7.5. To reject changes, select the 'Reject' option in the 'Review' menu bar



8. Resources

- 8.1. Microsoft Support: <http://support.microsoft.com/?ln=en-ie> has a useful search function.
- 8.2. Microsoft Word helper: <http://office.microsoft.com/en-us/word-help/>
- 8.3. The Help menu in MS Word is also a useful tool