



► Policy management evaluation toolkit.

How to identify the right partner for smarter policy
automation in healthcare.

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Every healthcare organization is managing more policies than ever. As regulations shift, documentation needs expand across departments faster than teams can track it—leading to hours spent searching for the right version of the right document for each updated policy and procedure.

The need for an automation solution has become essential, but not all policy management solutions are built for the complexities of healthcare. This toolkit, created by healthcare industry veterans, outlines questions to ask potential vendors and how to identify the features and support models that truly fit your organization's needs.

Use this toolkit to determine what to look for in a solutions actually sustains compliance and efficiency. Whether you're exploring automation for the first time or reevaluating your current system, this guide will help you compare options with confidence and make a strategic, informed choice.





Lesson 1:

Why effective policy management matters more than ever.

Policies are the backbone of healthcare operations. They drive patient safety, regulatory compliance and staff accountability, but the volume and velocity of change make manual management unsustainable. Regulatory and accreditation bodies such as the Joint Commission and CMS expect policies to be reviewed annually and/or whenever a regulation changes; keeping up with this rate of change can quickly overwhelm manual systems.¹

Without the right system, organizations face:

- Outdated or conflicting policies across departments
- Missed review cycles that may trigger survey findings
- Inconsistent staff attestation or training records
- Limited visibility during accreditation or audits

► KEY TAKEAWAY:

Policy management isn't just about storing documents, it's about maintaining readiness across every department.

¹ The Joint Commission. Hospital Accreditation Standards (annual review guidance); Centers for Medicare & Medicaid Services (CMS) State Operations Manual.

Lesson 2:

Vendor evaluation checklist.

Use this section when comparing vendors; each feature below aligns to a real-world need in healthcare compliance.

Evaluation Area	What an Effective Solution Will Have	Why It Matters
Centralized Access & Version Control	A single, searchable repository with clear ownership and audit trails.	Eliminates policy silos between nursing, HR, compliance and other clinical departments, ensuring staff always access the current approved version.
Automated Workflows & Review Cycles	Configurable approval workflows that align with your organization's hierarchy and regulatory/accreditation requirements.	Keeps policy updates on schedule for regulatory review and automatically alerts reviewers or approvers before deadlines are missed.
Audit & Survey Readiness	Instant reporting to demonstrate policy approval dates, review history, and staff acknowledgement rates.	Reduces scramble time during surveys from accrediting organizations and provides defensible documentation during audits.
Training & Attestation Tracking	Integration with learning management systems or built-in acknowledgement tracking.	Confirms that staff have reviewed and understood policy changes tied to safety, infection control, or HR compliance.
Real-Time Analytics & Dashboards	Real-time reporting that highlights overdue policies, gaps in department attestations and upcoming review cycles.	Enables compliance leaders to identify risk areas before they result in findings or citations.

► PRO TIP:

Ask each vendor to demonstrate how their system supports policy lifecycle automation specific to healthcare accreditation standards, not just document storage or generic approval routing.



Lesson 3:

Don't overlook implementation and support.

In healthcare, implementation isn't just a technical rollout, it's a change management process that affects compliance outcomes.

Ask potential vendors these questions:

- How do you ensure policy mapping aligns with Joint Commission or CMS requirements?
- Can you migrate legacy policies while preserving approval and revision history?
- How do you train department leaders who aren't tech users but are accountable for policy compliance?
- What support does your team provide when we're prepping for or undergoing an accreditation or state survey?
- What other kind of post-implementation support is included?

Look for:

- Guided onboarding led by healthcare compliance experts
- Custom templates built around your existing approval processes
- Continuous education and policy optimization post go-live
- Dedicated support teams familiar with healthcare audits and standards
- Train-the-trainer programs that build internal champions

► KEY TAKEAWAY:

A strong vendor partnership ensures your team not only launches successfully but stays audit-ready year-round.

Lesson 4:

How Ntracts Policy Manager measures up.

- ✔ Healthcare-specific automation tailored to accreditation, licensure and regulatory requirements.
- ✔ Centralized, searchable policy library with automatic version control and cross-department visibility.
- ✔ Automated workflows that mirror real healthcare approval chains—nursing, compliance, HR, safety and quality.
- ✔ Built-in attestation tracking that records who has read and acknowledged policies for audit proof.
- ✔ Survey-ready reporting with one-click access to review dates, approvers and staff compliance rates.
- ✔ Expert implementation and support from specialists who understand healthcare operations and compliance standards.

► PRO TIP:

As your healthcare organization expands and policies multiply, the best policy partner scales with that growth and adapts as regulations evolve, helping you stay compliant today and ready for whatever comes next.



Lesson 5:

Putting it all together.

As you assess potential partners, remember:

- The right solution should reflect how healthcare actually operates: Departmental, regulated and people driven.
- Automation should strengthen accountability, not add administrative burden.
- Ongoing support and healthcare expertise make compliance sustainable.

► NEXT STEP:

Use what you've learned here to evaluate your current policy process. Ask: "Do our systems help us stay survey ready and aligned, or are we managing compliance reactively?"

Ready to see it in action?

Learn how Ntracts helps healthcare organizations streamline policy management and stay audit-ready all year.

Supporting healthcare, end to end.

From policies to contracts and compliance, Ntracts has helped healthcare organizations stay ahead on every front for more than 35 years. Through our acquisition of MCN Solutions, we now offer an expanded suite of solutions to help healthcare teams manage risk, maintain compliance, and simplify complex workflows. Built by healthcare experts and trusted by clients nationwide, we're proud to maintain a 98% retention rate, a reflection of the lasting partnerships we build. Our purpose is simple: to power the teams behind the care, with technology that simplifies complexity and strengthens confidence across every department.

► Explore Ntracts Policy Manager

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