

Policy Information

Business Name	Your business name
Scope of Policy	Write a brief paragraph about your policy's scope.
Policy Prepared By	Name(s) of who prepared the document
Date Approved	The date your leaders approved the policy.
Policy Review Date	The date when this policy needs review.

Introduction

Purpose of Policy	Briefly explain why the policy exists.
Policy Statement	Write a brief statement about your commitment to your policy.
Key Risks	List the security risks that following this policy will prevent.

Responsibilities

Department or Individual	Add more rows to this table. List each department or individual by job title and name their key responsibilities
Enforcement	State the penalties for failing responsibilities.

Subject Access

Procedure for Requesting Access	Explain how someone would request access to confidential information. Who automatically has access should be listed in "Responsibilities."
Procedure for Granting Access	Explain how to grant someone's request for access. Who does so should be listed under "Responsibilities."
Authorization for Disclosure	Explain when it's appropriate to expose secured information.

Confidentiality

Scope	List what information needs to be kept confidential.
Communication with Staff	Explain when and how someone should give another staff member confidential information that they don't already know.
Communication with Third Parties	Explain when and how someone should give a third-party confidential information that they don't already know.

Storage Policy

Storage	Explain where and how responsible parties should store data.
----------------	--

Updating	List all of the circumstances when stored data must be updated.
Retention Period	Define retention periods for information. Name what types of information must be removed after a certain period.
Archiving	Explain how to archive data that's past its retention period and what should be destroyed instead of archived.

Consent

Forms of Consent	Explain when you need consent from the information owner to use the information (e.g. contact information for direct marketing).
Opting Out	Explain when people have the right to opt out of consent and how employees can opt them out.
Withdrawals	Explain when consent may be withdrawn. These details are important for legal purposes.