

Policies and procedures

Keep your written policies and procedures together, with versions, owners and review dates.

For any small business

● What it is for

A library for your own policy and procedure documents, so the version, effective date and review date of each sit in one place. It does not check or approve your documents.

● How to use it

1 Check the list

Open the **Required policies checklist** (17 items). For each, answer **Do you have this?** If you answer No, you see a link to our template if we have one, or a way to ask us for one.

2 Add a document

Select **Add a policy**. Enter the policy type, a title and a version.

3 Set the owner and dates

Enter the owner, an owner email for review reminders, the **effective date** and the **next review date**.

4 Attach it

Upload a PDF or Word file, or add a source link.

5 Link it to the checklist

Optionally say which required-policy item it covers, so the AI audit can use it.

6 Review on time

A reminder email goes to the owner's email address when a review is due. After each review, update the version and dates.

● Before you start

- Gather your current documents, or note a link to where each is kept.
- Know who owns each document and when it should next be reviewed.

● Good habits

- One named owner per document.
- Change the version number every time the content changes.
- Use **Notes** to record why a review changed nothing.

● How you sign in

Opens with your private link. No password to manage.

Optional AI wording help is always labelled as AI. It is a prompt to consider, never a verdict.

Verfapp supports your compliance. It does not certify it, and it is not legal advice. Screens shown use sample data.

Need a hand?

We are happy to walk you through it.

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