

CALMSHELL Master Policy Framework

Complete 35-Policy Governance Package

Version: 1.0

Date: June 2026

Status: Ready for Implementation

Total Policies: 35

Total Documentation: 600+ pages

Package Overview

This comprehensive package contains the complete CALMSHELL Master Policy Framework —35 professionally developed, Canada-compliant policies organized into 9 phases. This framework provides complete governance for CALMSHELL's operations as a mental health technology platform, therapy marketplace, educational academy, and community ecosystem.

Package Contents

1. Phases Directory (9 Phase Documents)

All 35 policies organized by implementation phase:

- **PHASE 1:** Core Legal & Platform Policies (5 policies, 72 pages)
 - Terms of Service
 - Privacy Policy
 - Consent to Services Policy
 - Cookie Policy
 - Accessibility Policy
- **PHASE 2:** Clinical & Therapy Policies (7 policies, 120 pages)
 - Therapist Verification Policy
 - Scope of Practice Policy
 - Telehealth / Virtual Care Policy
 - Crisis Response & Escalation Policy
 - Clinical Documentation Policy

- AI & Automated Recommendation Policy
- Postpartum Pathway Clinical Policy
- **PHASE 3: Health Information & Security Policies (4 policies, 76 pages)**
 - Data Protection & Encryption Policy
 - Confidentiality Policy
 - Health Information Retention Policy
 - Cybersecurity Incident Response Policy
- **PHASE 4: Community & Social Policies (4 policies, 61 pages)**
 - Community Guidelines Policy
 - Content Moderation Policy
 - Volunteer Support Program Policy
 - Peer Support Disclaimer Policy
- **PHASE 5: Corporate & Educational Policies (3 policies, 60 pages)**
 - Institutional Data Access Policy
 - Workplace Wellness Program Policy
 - Student Wellness & Academic Stress Policy
- **PHASE 6: Payment & Billing Policies (3 policies, 60 pages)**
 - Subscription & Billing Policy
 - Marketplace Payment Policy
 - Refund & Cancellation Policy
- **PHASE 7: Learning & Academy Policies (2 policies, 50 pages)**
 - CPD & Certification Policy
 - Intellectual Property Policy
- **PHASE 8: Research & Assessment Policies (2 policies, 50 pages)**
 - Research Ethics Policy
 - Assessment & Screening Disclaimer Policy
- **PHASE 9: Internal Governance Policies (5 policies, 100 pages)**
 - Staff Code of Conduct Policy
 - Equity, Diversity & Inclusion (EDI) Policy
 - Anti-Oppression & Cultural Safety Policy
 - Complaints & Dispute Resolution Policy
 - Risk Management Policy

2. Supporting Documents Directory

- **Master Integration Document** – Cross-reference matrix, dependencies, and integration points
- **Policy Inventory** – Complete list of all 35 policies with descriptions
- **Compliance Mapping** – Regulatory requirements for each policy
- **Stakeholder Guide** – Who is responsible for each policy

3. Implementation Guides Directory

- **Implementation Roadmap** – 39-week phased implementation timeline
- **Compliance Checklist** – Master compliance checklist
- **Quick Reference Guide** – Policy selection by stakeholder
- **Training Materials** – Staff training guides and resources

4. Compliance Tracking Directory

- **Compliance Matrix** – Tracking compliance with each policy
 - **Audit Checklist** – Regular audit procedures
 - **Metrics Dashboard** – Key compliance metrics
 - **Reporting Templates** – Compliance reporting templates
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Quick Start Guide

For First-Time Users

- 1 **Start Here:** Read [README.md](#) (this file)
- 2 **Understand Structure:** Review [Supporting Documents/Master Integration Document.md](#)
- 3 **Choose Your Phase:** Select relevant phase from [Phases/](#) directory
- 4 **Review Policies:** Read individual policy documents
- 5 **Plan Implementation:** Use [Implementation Guides/Implementation Roadmap.md](#)
- 6 **Track Progress:** Use [Compliance Tracking/](#) documents

For Different Stakeholders

Executive Leadership:

- Read: Master Integration Document
- Focus: Risk Management Policy, EDI Policy, Anti-Oppression Policy
- Use: Implementation Roadmap, Compliance Checklist

Legal Team:

- Read: All policies in Phases 1, 3, 6, 7
- Focus: Regulatory compliance mapping
- Use: Compliance Tracking documents

Clinical Team:

- Read: All policies in Phases 2, 3, 8
- Focus: Clinical standards, ethics, safety
- Use: Implementation Guides

Technology Team:

- Read: All policies in Phases 1, 3, 7, 11
- Focus: Data protection, security, AI
- Use: Implementation Guides

Operations Team:

- Read: All policies in Phases 4, 5, 6, 9
- Focus: Operations, partnerships, billing
- Use: Implementation Roadmap

HR Team:

- Read: All policies in Phase 9
- Focus: Staff conduct, EDI, anti-oppression
- Use: Training Materials

 Key Statistics

Metric	Value
Total Policies	35
Total Pages	600+
Implementation Phases	9
Implementation Timeline	39 weeks (9 months)
Regulatory Frameworks Covered	8
Stakeholder Groups	10+

Metric	Value
Implementation Tasks	200+
Compliance Items	150+

Implementation Timeline

Phase 1-2 (Weeks 1-10): Core Legal & Clinical Foundation

Phase 3-4 (Weeks 11-19): Security & Community

Phase 5-6 (Weeks 20-27): Partnerships & Billing

Phase 7-9 (Weeks 28-39): Academy, Research & Governance

Total: 39 weeks (approximately 9 months)

Compliance Coverage

Regulatory Frameworks

-  **PIPEDA** – Personal Information Protection
-  **PHIPA** – Personal Health Information Protection
-  **Consumer Protection Act** – Consumer rights
-  **Employment Standards Act** – Employment standards
-  **Human Rights Code** – Anti-discrimination
-  **AODA** – Accessibility requirements
-  **OHSA** – Occupational health & safety
-  **Tri-Council Policy Statement (TCPS2)** – Research ethics

Industry Standards

-  Professional college requirements
-  Mental health service standards
-  Telehealth best practices
-  Data security standards

- ☒ Research ethics standards
 - ☒ Educational standards
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How to Use This Package

1. Review & Customize

Each policy includes:

- Clear policy purpose and scope
- Detailed procedures and requirements
- Implementation checklists
- Compliance tracking
- Customizable sections marked with [brackets]

Customization Required:

- Organization name and contact information
- Specific dates and timelines
- Specific procedures and processes
- Specific roles and responsibilities
- Specific contact information

2. Implement Policies

Use the Implementation Roadmap to:

- Assign policy owners
- Set implementation timelines
- Allocate resources
- Track progress
- Monitor compliance

3. Train Staff

Use Training Materials to:

- Conduct orientation training
- Provide policy-specific training
- Conduct annual refresher training
- Document training completion
- Gather feedback

4. Monitor Compliance

Use Compliance Tracking to:

- Monitor policy compliance
- Track violations
- Investigate issues
- Generate reports
- Identify improvements

5. Review & Update

Each policy includes review schedule:

- Quarterly review for high-risk policies
 - Annual review for standard policies
 - Update based on regulatory changes
 - Update based on organizational changes
 - Update based on feedback
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Policy Selection Guide

By Organizational Function

Legal & Compliance:

- Policies 1, 2, 3, 4, 5, 13, 14, 15, 16, 28, 29, 34

Clinical Services:

- Policies 6, 7, 8, 9, 10, 11, 12, 20, 30

Technology & Security:

- Policies 4, 5, 11, 13, 14, 15, 16, 28

Operations & Partnerships:

- Policies 17, 18, 19, 21, 22, 23, 24, 25, 26, 27

Human Resources:

- Policies 31, 32, 33, 34, 35

Finance & Billing:

- Policies 24, 25, 26

Community & Support:

- Policies 17, 18, 19, 20, 22, 23

By User Type**Users/Clients:**

- Policies 1, 2, 3, 4, 5, 8, 24, 26, 30

Therapists/Coaches:

- Policies 6, 7, 8, 9, 10, 11, 25, 27

Staff:

- Policies 31, 32, 33, 34, 35

Partners:

- Policies 21, 22, 23, 25

Leadership:

- All policies
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 Support & Questions**For Policy Clarification**

- Review the specific policy document
- Check the FAQ section in each policy
- Consult with policy owner
- Contact legal team for interpretation

For Implementation Support

- Use Implementation Guides
- Review case studies and examples
- Consult with implementation team
- Contact policy owner

For Compliance Questions

- Review Compliance Tracking documents
 - Check Compliance Mapping
 - Consult with compliance officer
 - Contact legal team
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Document Format

All policy documents are in **Markdown format (.md)** for easy:

- Viewing in any text editor
- Converting to PDF or Word
- Version control and tracking
- Collaboration and editing
- Integration into documentation systems

Opening Markdown Files

On Mac:

- Default: TextEdit, Preview
- Recommended: VS Code, Sublime Text, Typora

On Windows:

- Default: Notepad
- Recommended: VS Code, Notepad++, Typora

On Linux:

- Default: Text Editor
- Recommended: VS Code, Gedit, Nano

Online:

- GitHub (free viewing)
 - Markdown viewers (online)
 - Google Docs (with Markdown import)
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Confidentiality Notice

These policy documents contain confidential and proprietary information of CALMSHELL. They are intended for internal use only and should not be shared with external parties without authorization.



Checklist for Implementation

- ☐ Assign policy owners for each policy
 - ☐ Allocate resources for implementation
 - ☐ Create implementation timeline
 - ☐ Conduct legal review
 - ☐ Customize policies for your organization
 - ☐ Develop training materials
 - ☐ Train all staff
 - ☐ Implement policies across organization
 - ☐ Monitor compliance
 - ☐ Gather feedback
 - ☐ Update policies based on feedback
 - ☐ Establish ongoing review cycle
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Next Steps

- 7 **Review** this README and Master Integration Document
 - 8 **Assign** policy owners and responsibilities
 - 9 **Customize** policies for your organization
 - 10 **Plan** implementation using the Implementation Roadmap
 - 11 **Train** staff on policies
 - 12 **Implement** policies phase by phase
 - 13 **Monitor** compliance using Compliance Tracking
 - 14 **Review** and update policies regularly
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Contact Information

For questions or support regarding this policy framework:

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Document Information

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Prepared By: CALMSHELL Policy Development Team

Reviewed By: [Legal Team, Executive Leadership]

Approved By: [Executive Director, Board]

Acknowledgments

This comprehensive policy framework was developed to support CALMSHELL's mission of providing accessible, high-quality mental health services through technology, partnerships, and community. The framework reflects best practices in mental health services, technology governance, and organizational management.

Thank you for choosing the CALMSHELL Master Policy Framework!

For more information, visit www.calmshell.ca or contact policies@calmshell.ca

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