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Compiling Standard Operating Procedures



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Compiling Standard Operating Procedures

Jennifer Steier, CPCP, Director, Procurement Systems and Card Operations, University of Louisville

Have you ever had a moment where you thought, what if this person walks out the door? What will we do? They are the knowledge base of our program. This is what happened to our program in early 2015. Our veteran staffer decided to retire, and we had to find a way to get all their knowledge onto paper. We jumped right into creating standard operating procedures, (SOP) for short, for each of our standard/routine internal processes and procedures. Some examples of the SOPs we created: how to process an application, how to cancel a card and how to process a spending limit increase request.

By creating SOPs, you are providing how-to instructions that describe how to perform standard/routine internal processes and procedures. SOPs can also be referred to as procedure manuals, protocols or even desk instructions/manuals. By creating and providing step-by-step instructions on how something is completed, you are helping to ensure that the internal processes/procedures are completed consistently the same way each time no matter who on your staff completes it, a new employee or a 10-year veteran. I find that these are great training tools and even aid in compliance monitoring of the program. Any internal process/procedure can be documented. Our SOPs are written from the new employee perspective.

If you find yourself getting overwhelmed with where to start with creating SOPs, I recommend starting small. Start by creating an SOP for the most common task completed and build from there. Thinking about all the different things that are done to maintain a program can be daunting.

When starting to write an SOP, first think of the audience that will be using it. As mentioned above, I highly recommend writing them from the perspective of a new employee who has no knowledge of the program. Also keep in mind that they may not be familiar with the language commonly used. If you use an acronym (I know I do!), be sure to say what it stands for. Do not assume that everyone will know what the acronym means. Also, consider your knowledge level. Do you know all the steps for the process you are creating an SOP for? Is there someone else within the department who might be better suited for writing the SOP? If you are not the best person, partner with someone who is or ask them to write down the steps. When we first started compiling our SOPs, I know I had to partner with the "experts" within our department. Partnering with them to create SOPs was a valuable learning experience for me.

How to create an SOP

1. Start with the title.
 - o Keep it short and sweet. How to process an application, how to process a grant renewal form.
2. Provide a description of the process/procedure that the SOP will cover
 - o I like to provide the reason why for the SOP. I find it easier to do something if I understand why I am doing it. People may also be more likely to make the effort to do it properly if they can see a benefit for themselves or for their coworkers or department.
3. Step-by-step instructions
 - o Detail the steps for completing the process. Include screens shots and provide example emails.
 - o Use numbered bullet points—descriptive words such as *navigate to*, *log into*, *click on*
 - o Refer to other SOPs already written

4. Include creation date and revision date in the footer

Once you have created the SOP, make sure to review it for accuracy. No matter how well you know your processes/procedures, it is always best to have someone else review/provide feedback on what you have created for accuracy. This can provide key information or potential steps not included. By creating SOPs for our program, we found that some things we did were redundant and we were able to eliminate them. We have also streamlined several processes for better efficiency/time management.

Here are some tips and tricks that I like to keep in mind when creating SOPs:

- Include flow charts, diagrams, screen shots, example emails
 - By providing example emails, this helps to ensure that end-users receive consistent communication from our office.
- Explain acronyms: Do not assume everyone has the same knowledge level
- Remember the level of detail provided is important
 - If writing from the prospective of a new hire, do not assume they know every detail of the department or business.
- Refer to other SOPs rather than rewriting
- Provide both options, paper, and electronic versions to staff
- Set reminders to review and update SOPs semiannually.
 - If an SOP is updated, be sure to share that it was updated with department staff
 - As a reminder, an SOP is a living document that can be updated/changed at any time.

Components to Include in Administrator SOP

Since every program is different, the components to be covered in the SOP will vary. Below is the table of contents for what the University of Louisville covers in our administrative SOP. You can see additional samples of the SOP [here](#).

- Card Application and Receipt Process
- P-Card Testing/Training/Security Access
- Card Maintenance
- Issuer Notifications
- Grants
- Billing Cycle Reconciliation
- Reports/Queries
- Reports
- OnBase Instructions
- Amazon Business

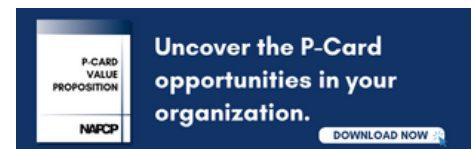
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