

SOP no.		Version		Effective date	
Owner		Approver		Review date	

Purpose

Why does this procedure exist? Say in one or two sentences what it makes sure of, for example: "To make sure every refund is checked and approved before money leaves the business."

Scope

Who and what does it cover, and what does it not cover? Name the roles, sites and situations.

Responsibilities

List each role involved and what it does in this procedure, for example: "Store manager: approves refunds over \$100."

Definitions

Explain any term, acronym or system a new starter might not know.

What you need

List the equipment, systems, forms and access someone needs before they start.

Procedure

Number the steps in the order they're done. Start each step with a verb ("Check", "Enter", "Call"), keep one action per step, and add a caution where a mistake could cause harm or cost money.

Records

What evidence does the procedure produce, where is it kept, and for how long?

Related documents

Name the policies, forms and other SOPs that go with this one.

Revision history

Version	Date	What changed	Approved by