How To Create Or Update A Procedure

Use/adjust these steps to create or update each policy, procedure or checklist that you have identified for your business/workgroup. Identify responsibilities & deadlines for each step. Treat it as a project.

A. **IDENTIFY** THE TITLE & **DOCUMENT** THE PURPOSE.

B. **DETERMINE** REQUIREMENTS **- BRAINSTORM**.

C. **LOOK AT** EXISTING POLICIES, PROCEDURES, MANUALS, QA, OH&S MANUALS, HEAD OFFICE, ETC. **CONSULT** PROCESS OWNER(S).

D. **SET** THE STANDARD, **DETERMINE** THE STEPS/HOW TO'S, IDENTIFY LINKAGES, TOOLS & ATTACHMENTS, CHECKLISTS, ETC.

E. **DRAFT** PROCEDURE **& TYPE**. **USE** SHORT "COMMANDS" AND **START** EACH ACTION WITH A VERB OR ACTION WORD (JUST LIKE THESE INSTRUCTIONS).

F. **CHECK** COMPLIANCES (QA, OCCUPATIONAL HEALTH & SAFETY, ETC.).

G. **TEST / CIRCULATE** FOR COMMENT / REVIEW/ FEEDBACK.

H. **AMEND** AS REQUIRED **AND FINALIZE**.

I. **SCHEDULE** STAFF TRAINING/REVIEW WITH WORKGROUP AS APPROPRIATE AT MEETINGS, OR IN YEARLY PLANNER.

J. **OBTAIN** APPROVAL/SIGN OFF.

K. **SET** REVIEW DATE.

L. **ADD TO/UPDATE** POLICY & PROCEDURES MANUAL, CONTENTS PAGE, REVIEW LOG, ETC.

M. **DISTRIBUTE.**

N. **ADD** TO JOB DESCRIPTION(S).

O. **UPDATE** MEETING AGENDAS FOR PROJECT & ONGOING MONITORING, AS APPROPRIATE.