

Process Guide

Name: Write the process name here

Last Revised: Write the date the process guide was last revised. You should save this as a revision to maintain a historical record of retired processes to allow for analysis of how processes have been revised over time.

Process owner: List the person primarily responsible for writing and revising the process guide, or approving its revision

Department: List the departments that will execute the process

Approvers: List any people / positions / roles that will act as approvers within the process

Purpose: Define the purpose of the process, why you are doing this and what is the point

Scope: Define the scope of the process, where it begins and ends, and what it may not do or what would be beyond the scope of this guide.

Preceding processes: List any processes that relate to this one and would need to have been started and possibly completed prior to beginning this process.

Supporting Software: List all the software platforms that will be used during this process.

Related documents: List any documents that should be collected to perform this process and describe where to find them

|  |  |
| --- | --- |
| File Name | File Location |
|  |  |
|  |  |

Description: Fill in the table to define all of the steps that should be followed. You may additionally modify the formatting to suit your specific needs.

**Trigger:** Describe how the process would be initiated. This could be some type of request, date, occurrence or otherwise.

**Action:** Write out the various steps that must be followed to properly execute the process

|  |  |  |
| --- | --- | --- |
| Step | Who will do it | What needs to be done |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |

Departments / People to be informed process has been completed: List any other departments or people that should be informed the process has been completed

Next steps: List any processes that should now begin, or other steps that should be taken as a follow up to this process after it is complete

Process Evaluation: Provide commentary on your sense of the quality, efficiency and effectives of this process as well as when it might need to be revised and why.