

Process: [Process name, verb + object, the way people ask for it]

Replace every text in [brackets]. It says what happens and why, from trigger to result, and which roles take part. No tool names, button names, screenshots or deadlines here: they go in the linked procedure (SOP) and work instructions. Delete these grey hints when done.

Process owner	[One name and team]
Version and date	[1.0, date]
Next review	[Date, or the change that forces one]

Approval

Prepared	Reviewed	Approved
[Name, date]	[Name, date]	[Name, date]

About this process

Purpose	[One sentence: the result and who gets it]
Scope	[Starts when ... Ends when ... Not covered: ...]
Trigger	[The event that starts it, not a person or a habit]
Inputs	[What must exist before the first step, and who supplies it]
Outputs	[What exists when it is done, so that someone else can check it]
Measures	[One or two numbers that show whether the process works, and how often they are read]

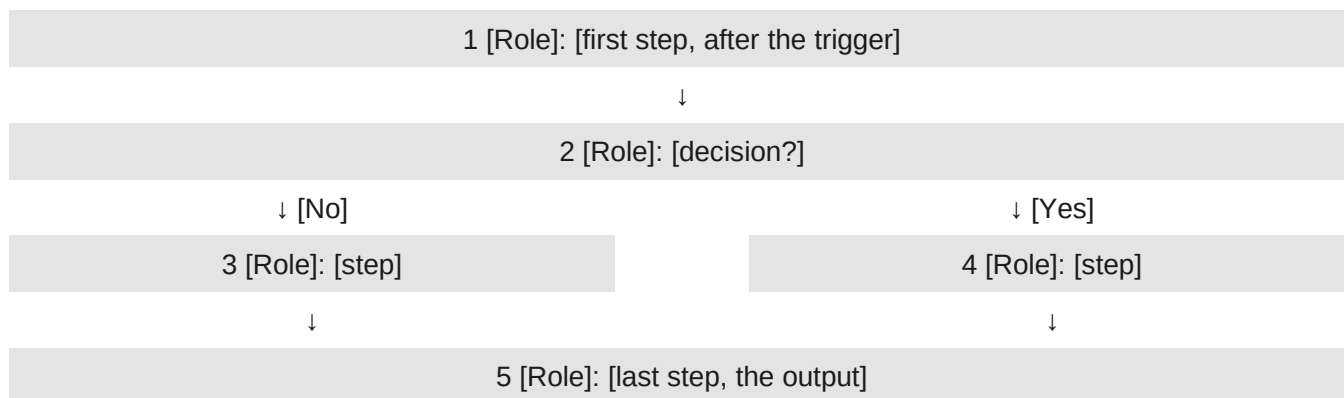
Roles and responsibilities

Role	Decides or does
[Role, not a name]	[What this role decides or does in the process]
[Role]	[]

[Role]	[]
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Process at a glance

Redraw for your process: one box per step, numbered as in the steps table, and both branches of each decision.



Steps

#	Role	Activity and handoff	Linked document
1	[Role]	[What happens, and who gets it next. 4 to 10 rows in all]	[Work instruction title, if the step happens on a screen]
2	[]	[For a decision: If ..., go to step ...]	[]
3	[]	[]	[]
4	[]	[]	[]
5	[]	[]	[]
6	[]	[]	[]

Linked procedures and work instructions

Title	Where it lives
[Title of the procedure (SOP) or work instruction]	[Folder, wiki page or link]
[]	[]

Change log

Version	Date	What changed	By
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[1.0]	[Date]	[First version]	[Name]
[]	[]	[]	[]