PROCEDURE NAME:	Procedure for Writing a Procedure
DATE WRITTEN:	31st July 2014
ROLES PERFORMED BY:	HR Administrator
CATEGORY:	HR Office Procedures
DESCRIPTION:	**Note:** The steps below are for the writing of the first version of a procedure which is the more usual route. Updating of existing procedure steps have been omitted to make this procedure easier to follow but they have been included in flowchart below. To help identify new procedures, the job responsibilities for each role can be checked to see if there are common tasks carried out by multiple roles e.g General Admin, or critical tasks that must be carried out precisely e.g I.T Support. **Step 1** - Check old procedures system for existing procedure to use as basis. Before starting into writing a new procedure, it is always worthwhile to check if there is an existing informal procedure in use within the section which could easily be transcribed and become a good starting point. **Step 2** - Check suitability of Process/Task to be made into Procedure A written procedure is necessary only if the issue is important or if there will be a significant benefit from clarifying a process. You need a procedure when a process/task. • Is lengthy (example: year-end inventory). • Is complex (example: benefits administration). • Is routine, but it's essential that everyone strictly follows rules (example: payroll). • Demands consistency (example: handling a refund request). • Involves documentation (example: disciplining a staff member). • Involves significant change (example: installing a new computer system). • Has serious consequences if done wrong (example: safety guidelines). If it is decided that the process/task under consideration is not suitable to be made into a procedure then update the status on the procedure tracking spreadsheet to 'Not Suitable' and add reason why it has been ruled out. **Step 3** - Update Procedure Tracking Spreadsheet At this point the procedure is going ahead so update the status on the procedure tracking spreadsheet to 'In-progress' **Step 4** - Identify Most Suitable Team Leader/Senior User with Process/Task Knowledge Talk with content experts as well as others who hold key information – long-time staff members, stakeholders, technical staff, and people who will use the

procedure.

Step 5 – Gather the Required Information for Procedure using Interviews, Questionnaires etc

There are a variety of techniques to help understand the way processes/tasks are carried out within a business but the most suitable ones are Interviews, Document Analysis and Questionnaires.

The first port of call would be to talk to team leaders who can provide high level information about the process to get a broad understanding. Once the big picture is understood then regular members of the team could be interviewed to fill in the exact details of how the process works. The interview questions should be organised into a logical sequence so that the interview flows well

A general interview plan should be produced which will list the questions to be asked in appropriate order, anticipating possible answers and probing further to establish the pertinent information for the procedure.

During the interview, documents, reports, forms and user training manuals may be mentioned to give further information on topics discussed. These items will provide valuable source of detailed information and may need to be referred to in procedure with links to forms and screenshots etc

Where there is a large no of users involved and opinions are needed on general ways of improving business processes or usefulness of systems etc then an online web based questionnaire can be used to get responses e.g surveymonkey.com or freeonlinesurveys.com.

Step 6 – Create First Draft Version of Procedure

Use this procedure template to give the procedure structure within the online procedures manual while also providing consistency across different procedures which will improve readability and ease of access.

Use a mindmap to identify the steps to be followed to bring the process/task to completion. Add content for each step which clearly describes how to carry it out using command like structure with bullets where possible.

For computer-related tasks add screenshots with arrows and text boxes which describe clearly which menu options should be selected and how the required information should be input.

Where the process/task involves many steps and decision points, then a flowchart should be included as shown below.

Step 7 - Check Usability and Completeness of Procedure

The procedure should be bench checked to make sure that it is watertight and all eventualities are covered so that it can be followed easily by users. There also should be minimum need for further direction or guidance from team leader while the procedure is being followed. The procedure should also allow for exceptions where the users experience and problem solving skills are called upon to resolve.

Step 8 - Send Updated/Draft Version of Procedure to Senior User for

	Review The draft version of procedure is sent to Senior User for review. The document enters the review loop where it is inspected by Senior User and any changes identified are added as comments to the PDF version for amendment later by HR Administrator. **Step 9** - Re-Issue/Issue Procedure to all Relevant Parties Once the changes suggested by Senior User are made then the procedure can be Issued to all users to use and provide feedback so that the procedure can be kept up-to-date as new ways of working are introduced. **Step 10** - Update Procedure Tracking Spreadsheet The procedure is now completed so update the status on the procedure tracking spreadsheet to 'Completed' and move onto the next procedure. At any one time it is probably ideal to have about 5 procedures in the pipeline so that the HR Administrator is kept busy as each procedure goes through the steps above.
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OTHER NOTES:	

Figure 1 - Flowchart showing steps to create a new procedure or update an existing one