

Writing a Procedure

PURPOSE:

1. Improve the quality of work within the practice.
2. Reduce number of errors and omissions.
3. Help new people perform complex tasks quickly and effectively.
4. Communicate what end-user needs to know to execute task.
5. Answer why the task needs to be completed.
6. Use enough detail so end-user can complete with minimal or no help.
7. Provide a consistent way of naming, saving, training, updating, releasing, and approving procedures.
8. Provide a timeframe for when the procedure will be performed, if applicable.

PROCEDURE:

1. Gather detailed information on the process before you start writing.
2. Consult with experts who hold key information needed to write procedure.
3. Take good notes.
4. Organize information gathered.
5. Have clear understanding of process and as much detail as you need.
6. Cut information down to what the end-user needs to best understand process.
7. Write first draft of procedure.
8. Avoid too many words – be specific.
9. Use the active voice. Example: “**Send** patient invoice for labs” rather than “**You should then send** the patient the invoice for the labs.”
10. Use lists and bullets.
11. Explain assumptions, if used, and make sure they are valid.
12. Write at an appropriate reading level.
13. Use pictures or video if they will enhance procedure.
14. Related procedures referenced in this document must be bolded with a link provided to the related procedure.
15. Notify approver/manager to review and approve/comment.
16. Reviewer is given 48 hours to review.
17. Reviewer thoroughly reviews and comments on document.
18. Reviewer sends back to writer with one of the following noted:
 - 18.1 Approved to publish as is

- 18.2 Approved with changes as noted, then publish
- 18.3 Revise as noted and resubmit to reviewer when complete
- 18.4 Meet with reviewer to revise
- 19. Update, if needed, based on reviewers' suggestions.
- 20. Re-submit to reviewer if asked.
- 21. Save to the Working Procedure folder and name according to your naming protocol.
- 22. Share the document with those that need to review it.
- 23. Every person the document was shared with must date and initial at the bottom of the document to show they have reviewed and agree with the new procedure.
- 24. If an employee has a suggested update to a procedure, he or she will:
 - 24.1 Email the writer of the procedure
 - 24.2 Add the suggestion directly to the procedure document using "tracking changes" so that the author can see the suggested change.
 - 24.3 Share with the approver of the procedure
- 25. If an update has been approved, all people with access to procedure will be notified.
- 26. If a major revision was written, then all people involved must date/initial (delete the old dates/initials).
- 27. If a minor change (grammar, etc.), then the change will just be made.
- 28. If a problem arises when following every step of this procedure, please notify the writer immediately.

Please date and initial below that you have read and understand this procedure:

Initials: _____ Date: _____