SOP: Management of Required Forms and Documentation Templates

This SOP details the management of **required forms and documentation templates**, including the creation, approval, distribution, and storage of standardized templates. It ensures consistency, accuracy, and compliance in document handling across all departments, facilitating smooth operational workflows and regulatory adherence. The procedure covers version control, template updates, user access, and training on proper usage to maintain document integrity and support effective communication within the organization.

1. Purpose

To establish a standardized process for the creation, management, distribution, and maintenance of required forms and documentation templates.

2. Scope

This SOP applies to all employees involved in the creation, approval, distribution, and use of organizational forms and documentation templates across all departments.

3. Responsibilities

Role	Responsibility
Document Owner	Initiates creation and updates, ensures content accuracy and compliance.
Approver	Reviews and approves new templates or updates before release.
Document Custodian	Manages storage, access, and distribution of templates.
All Users	Use only the latest approved templates and report any issues or required changes.

4. Procedure

1. **Creation of Templates**
   - Document Owner drafts new template using approved format.
   - Template incorporates necessary regulatory and organizational requirements.

2. **Review and Approval**
   - Template submitted to Approver for review.
   - Approver checks for completeness, accuracy, and compliance.
   - Approved templates are assigned unique version numbers and approval dates.

3. **Distribution**
   - Document Custodian uploads the approved template to the centralized document repository.
   - All relevant users are notified of the new or updated template's availability.

4. **Storage and Access**
   - All templates are stored securely with controlled access rights.
   - Obsolete versions are archived and clearly marked as superseded.

5. **Version Control and Updates**
   - Each update is documented with version history and change log.

- Users are promptly informed of changes.

6. **Training and Support**
   - Training sessions are conducted to ensure users understand the purpose, location, and correct use of templates.
   - User support is available for template-related queries.

5. Forms and Documentation Templates

- Template Request Form
- Template Change Log
- Approval Record Form
- Template User Access Request

6. Records Management

- Maintain a log of all templates with version history and approval records.
- Archive superseded templates for reference and audit purposes.

7. References

- Document Management Policy
- Regulatory Compliance Guidelines
- Internal Quality Manual

8. Revision History

Date	Version	Description of Change	Approved By
2024-06-01	1.0	Initial release	Quality Manager