SOP Template: Initial Review and Assignment to Appropriate Personnel

This SOP details the process for **initial review and assignment to appropriate personnel**, ensuring that incoming tasks or requests are promptly evaluated and delegated to the most qualified team members. The procedure includes criteria for assessment, documentation standards, communication protocols, and timelines for assignment to optimize workflow efficiency and accountability within the organization.

1. Purpose

To provide a standardized procedure for the initial review and assignment of incoming tasks or requests to ensure prompt evaluation, documentation, assignment, and communication across the organization.

2. Scope

This SOP applies to all staff responsible for receiving, reviewing, and assigning incoming tasks or requests within [Department/Unit/Organization].

3. Roles and Responsibilities

Role	Responsibility
Reviewer	Receives and conducts the initial evaluation of incoming requests or tasks.
Assigning Manager/Supervisor	Reviews assessment, assigns tasks to the appropriate personnel, and ensures timelines are met.
Assigned Personnel	Receives and acknowledges the assignment, responsible for task completion per standards.

4. Procedure

1. **Receipt of Request/Task**
   - All incoming tasks or requests are received through designated channels (e.g., email, portal).
   - Log the request in the tracking system, noting date, source, and description.
2. **Initial Review and Assessment**
   - Evaluate the request for completeness and clarity.
   - Determine the category, priority, and urgency.
   - If additional information is needed, request promptly from the originator.
3. **Assignment Criteria**
   - Match request type and required expertise with skillsets of available personnel.
   - Consider current workload and availability.
   - Document rationale for assignment selection.
4. **Documentation Standards**
   - Record all communications and updates in the tracking system.
   - Ensure all fields (e.g., assignee, due date, status) are completed.
5. **Communication Protocols**
   - Notify assigned personnel of new assignment with all relevant details via email or system notification within one business day.
   - Provide confirmation to the requestor that the matter is being addressed.
6. **Timelines for Assignment**
   - Initial review and assignment must be completed within 1 business day of receipt.
   - High-priority or urgent requests should be assigned within 2 hours.

5. Monitoring and Review

- Regularly review assignment records to ensure compliance with timelines and procedures.
- Conduct periodic audits to assess the effectiveness of the assignment process.

6. References

- [Insert links or titles of relevant policy documents, forms, and systems]

7. Revision History

Version	Date	Description	Author
1.0	[Insert Date]	Initial SOP release	[Insert Author]