

SOP: Request Logging and Documentation Standards

This SOP defines the **request logging and documentation standards**, detailing the procedures for accurately recording, tracking, and managing all incoming requests. It covers standardized logging formats, documentation best practices, data entry protocols, request prioritization, and tracking methods to ensure transparency, consistency, and accountability throughout the request handling process. The goal is to maintain clear, organized records that facilitate efficient follow-up, performance monitoring, and audit compliance.

1. Scope

- Applies to all staff responsible for handling, documenting, and tracking incoming requests.
- Encompasses all request types received via email, phone, ticketing systems, web forms, or in-person.

2. Responsibilities

- Request Handlers:** Log and document every request accurately and promptly.
- Supervisors:** Review request logs for completeness, accuracy, and adherence to standards.
- IT/Admin:** Maintain the request tracking system and ensure its availability.

3. Standardized Logging Format

- Each request must be recorded in the approved tracking system (e.g., ticketing software, spreadsheet, or logbook).
- Mandatory fields for each entry:

Field	Description
Request ID	System-assigned unique identifier
Date & Time Received	Timestamp of request arrival
Requestor Details	Name, contact information, department
Description	Concise summary of the request
Category	Type of request (e.g., IT, Maintenance, HR)
Priority Level	Low / Medium / High / Critical
Status	Open / In Progress / On Hold / Resolved / Closed
Handler	Person responsible for follow-up
Action Taken	Progress notes, responses, updates
Resolution Date	Date the issue is closed/resolved

- Example log entry (format):

```
REQ-2024-0810 | 2024-06-15 09:23 | A. Lee (aleed@company.com, HR) | System access issue | IT | High | Open | J. Smith | Ticket assigned to IT | -
```

4. Documentation Best Practices

- Use clear, concise, and objective language in all entries.
- Document actions and communications chronologically.
- Update the request status and action log at each stage.
- Avoid using jargon or abbreviations unless commonly understood within the organization.
- Attach relevant files or correspondence as needed.

5. Data Entry Protocols

- Record all requests within **1 business hour** of receipt.

2. Verify the accuracy of contact and request details before entry.
3. Ensure all mandatory fields are complete before saving the record.
4. For requests received outside business hours, log by 10:00 AM the next business day.

6. Request Prioritization

- Assign an initial priority based on urgency and impact:
 - **Low:** No immediate impact; routine requests.
 - **Medium:** Moderate impact; time-bound but not urgent.
 - **High:** Significant impact; requires prompt attention.
 - **Critical:** Severe impact; business/interruption or safety risk.
- Review and adjust priority as new information becomes available.

7. Tracking and Monitoring

- Monitor open requests daily for timely progress and resolution.
- Escalate stalled or overdue requests as per escalation protocols.
- Keep requestors informed of major status changes or delays.
- Review logs weekly for completeness and accuracy.

8. Audit and Record Retention

- Maintain request records for a minimum of **12 months**, or as per organizational policy.
- Archive closed requests at the end of each quarter for audit purposes.
- Ensure electronic logs are backed up securely and access-controlled.

9. Continuous Improvement

- Collect feedback on the request logging process bi-annually.
- Update SOP and training materials as process improvements are identified.
- Provide refresher training as necessary to maintain compliance and awareness.

10. References

- Company Request Handling Policy
- Data Protection & Privacy Guidelines
- Internal Escalation Procedures