

SOP DRAFTING AND REVIEW CHECKLIST

The following resources can support the development of your SOPs. The SOP Template offers a structured format to guide the drafting process, while the SOP Checklist helps ensure critical details are not overlooked. The checklist can also be used as a tool for evaluating existing SOPs, helping to identify areas for improvement

Element	Completed	Notes
Title, Purpose, Scope		
SOP has a clear and descriptive title	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	
SOP introduces and defines the purpose and importance of the document	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	
SOP defines the intended audience for the document	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	
Roles and Responsibilities		
SOP defines roles and responsibilities of staff/teams involved in the process	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	
Glossary, Materials, References		
SOP includes a section defining key terms and explains all acronyms	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	
If not linked to or included within the document, SOP has a section listing all related checklists, templates and forms and their locations	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	
If not linked to or included within the document, SOP has a section detailing or linking to applicable Election Code(s) relevant to the procedure	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	
Procedure Steps and Visuals		
SOP sections include brief introductions when detailing each process	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	
SOP includes bulleted or numbered lists when sequential steps are part of a process	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	
SOP includes visuals especially when detailing objects (e.g., use the blue bin to...); equipment setup (e.g., turn the e-pollbook on by...); and navigation of technical systems (e.g., go to the login screen and...)	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	
SOP includes flowcharts or other illustrations to detail processes that may have varying outcomes	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	

Element	Completed	Notes
Testing		
SOP has been tested by non-subject matter experts for completeness and clarity (SOP should be tested again after revisions)	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	
Revision Schedule and Filing		
SOP includes a last revised date	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	
SOP includes a chart or list of revisions, who made the revision and when	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	
SOP notes the revision schedule (e.g., Doc reviewed annually in May)	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	
Completed/Approved SOP is stored in an accessible, centralized location	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	
Formatting		
SOP is created in a tool that allows for easy formatting/updates	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	
SOP includes a Title page with office/county logo	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	
SOP includes a Table of Contents , if there are several sections	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	
SOP includes page numbers	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	
SOP includes clear section headers	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	