



Schulich  
MEDICINE & DENTISTRY

**Standard Operating Procedures**  
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# WHAT IS AN SOP

- A Standard Operating Procedure (SOP) is a document consisting of step-by-step information on how to execute a task(s).
- It may seem daunting, but it's really just a very, very, *very* thorough checklist.

# Getting Started.....

I divided a few of my tasks according to when they are performed during the year and picked 1-2 events / month.

**JANUARY**  
Creog Exam  
CaRMS

**FEBRUARY**  
Making a Mark

**MARCH**  
Mock OSCE Exam

**APRIL**  
Royal College  
Exams

**MAY**  
Research Day

**JUNE**  
Resident Farewell

**JULY**  
New Residents

**AUGUST**  
Welcome BBQ

**SEPTEMBER**  
HH Allen Day

**OCTOBER**  
ICRE Conference  
Update CaRMS site

**NOVEMBER**  
Resident Retreat  
CREOG Exam

**DECEMBER**  
Dept Holiday  
Celebration

# Features of Schulich SOP's

- Introduction: Schulich SOP's have features to help make SOP's easy to scan and read
- Format ~ The following features make up the Schulich SOP layout:
  - Title for each section of the SOP
  - Headings aligned left
  - Content aligned middle to right
  - Lines separating each section
  - Use of white space

# Writing style for SOP's

- A well written SOP uses language that is:
  - Direct
  - Written in an instructional voice
  - Action oriented
  - Written in present tense
  - Concise

# Displaying the SOP effectively

- Word processing tools provide ways to make SOP's easy to follow and scan
  - Use tables for procedural steps
  - Use bullets and lists to highlight key information
  - Chunk out information
  - Visual's

# Introduction

- The purpose of the introduction is to explain what information is about to follow.
- It could be two sentences, or an entire paragraph.

# Using a Contacts Section

- The contact section provides the name, title of the person's role and email/phone number of people who can help with or are related in some way to the procedure. A person to include in contacts might be someone who:
  - Can answer questions about the procedure
  - Is impacted if there is a problem performing the procedure
  - Does a process immediately before the procedure.

# Creating the SOP Draft

- Plan out the SOP document before you begin writing. Look at the categories you organized the information into and think about:
  1. What sections are needed
  2. Where the information collected should be placed
  3. What information is missing

# Finalizing the SOP

- Finalizing is the stage where the SOP is tested, revised and then published.
- Test the SOP by giving it to someone in your unit, or another unit who is unfamiliar with the procedure. Ask them to perform the procedure with any guidance and to make notes of anything that is unclear or a step does not follow the document.
- Revise the SOP based of the tester's feedback.

# Publishing the SOP

- Publish the final version of the SOP in a location that is accessible to your team.
- This ensures that support is available during peak periods, when you are away from the office.

# Reviewing and Revising

- The SOP document needs to remain active after it is published. Remaining active means that the SOP is used to guide procedures and is reviewed and updated.
- The schedule at Schulich for reviewing procedures is once every year OR when there is a change that impacts the procedure.
- Reviews should be documented, even if the SOP is not changed.
- You may want to archive outdated procedures in case you need to refer to it in the future.