



College:  
 Dept:  
 Responsible Executive: job title  
 Responsible Office:  
 Originally Issued:  
 Revised:

**PROCESS NAME:**

---

**SECTION I. PROCESS IDENTIFICATION INFORMATION**

---

**Office:** Enter the name of the office here.

**Process Name:**

**Description:** Briefly explain the purpose of the process.

**Trigger (s):** List the event (s) that trigger the process. (triggers can be calendar date, receipt of a form, actual events.)

---

**SECTION II. PROCESS STEPS**

---

This section should describe a “how to” process. The process should reference policies, forms, and outline on required action according to job function. Include screen shots, tables and/or other tools.

Process Sub-titles	Process Steps

---

**SECTION III. RELATED DOCUMENTS**

---

List related university/department internal and external documents that provide helpful, relevant information.

Documents
Place text here. Document name.

---

**SECTION IV. RELATED POLICIES**

---

List (if any) related system and/or university policy that trigger/provide helpful, relevant information.

University Documents

Place text here. Policy name and code/handbook location.

---

**SECTION V. CONTACTS**

---

The first item is usually "Policy clarification" which directs the reader to the Responsible Office. Other items relate to subject matter in the document about which the reader may have follow-up questions.

<b>Subject Matter (alphabetical order)</b>	<b>Office Name (not the name of an individual)</b>	<b>Telephone Number</b>	<b>Email/URL</b>

---

**SECTION VI. ACRONYMS/COMMONLY USED TERMS (OPTIONAL)**

---

Define acronyms/commonly used terms that have specialized meanings in the process.

<b>Insert Term (alphabetical order)</b>	<b>Define.</b>

---

**SECTION VII. FORMS AND TOOLS/ONLINE PROCESSES (OPTIONAL)**

---

Forms/Online Processes should be included with information on how to obtain any forms or perform any online processes.

---

**SECTION VIII. APPENDIX (OPTIONAL)**

---

Appendices are used for informational material that is helpful, but not directly related to the performing of the process.

Process Name:  
Date of most recent changes: XX/XX/XXXX

Created by: first initial, lastname  
Tested by: first initial, lastname  
Approved by: first initial, lastname

Date:  
Date:  
Date:

- Use this style of bullet
- ◆ Use this symbol before a Note

DRAFT