**Job Aid: Document Process Steps**

| **Activity Step** | **What Happens** |
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| Need for new document identified. |  |
| New document type is determined. | The document hierarchy tier identifies the appropriate standardized document template to use during development.  |
| Document is drafted. | The designated author communicates the needed information in a language commonly understood by staff members. |
| Document is evaluated and reviewed. | The document is assessed and will continue to be edited until it:•Is complete and correct regarding template format and content;•Can be followed or performed as written;•Is compliant with all requirements. Once no further edits are needed, the document is considered validated for its intended use. |
| Approval is obtained. | The signature provides the evidence that the appropriate individual authorized the document's implementation.  |
| Staff notification is made. | The new information is presented to staff. This communication is documented. |
| Document is issued, distributed and implemented. | •The signed and approved document is added to the Master File. •The Master Index is updated.•Working copies are made and sent to appropriate locations. All previous copies of the older version are removed. |
| Training Process | The relevant employees learn and try applying the new or changed information.  |
| Competency Process | The relevant employees are assesses to determine if they understand and can successfully accomplish their assigned work processes. |
| Document is reviewed for continuing suitability. | The document is examined to determine if it continues to be fit-for-use within the organization. A decision of either *keep*, *change*, or *retire* is made. |
| Document needs no changes (no revisions). | Because the document's content is considered current, correct, and complete, the document is retained as is. The review decision to remain the same is noted. |
| Document needs revision. | The document is deemed insufficient and requires modifications to be made. |
| Copy of current version is retrieved. | An uncontrolled copy is made from the authorized version. |
| Document is edited. | The current document's version undergoes modifications addressing any errors, oversights, or areas that no longer reflect current work practices.  |
| Document is retired. | The document is no longer needed for use and is discontinued.  |
| Document is archived. |  The outdated document is removed from access. The document's obsolescence is noted and dated.  |
| Document is stored. | One copy of the obsolete document is retained in such a manner that•Loss or damage is prevented during its retention period;•It can be easily retrieved, if needed. |
| Document is destroyed. | The retention period for the obsolete document has been met, and the documented is discarded. |
| End |   |
| Master File and Master Index Maintenance Process | A portfolio or album that contains the current and all previous versions of the document is maintained. All working copies can be made from the current version it contains. A spreadsheet or document inventory listing all documents currently in-use and their distribution is maintained. |