RAAO Standard Operating Procedure (SOP) Manual – Draft

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Purpose

This SOP Manual outlines the day-to-day procedures RAAO staff follow across key functional areas. These procedures are designed to promote consistency, accuracy, and compliance. This draft version includes core workflows and will be refined through staff feedback and system integration.

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Structure

Each SOP includes:

- Purpose of the procedure

- Step-by-step tasks

- Role(s) responsible

- System/Tools involved

- Related policy reference

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1. Finance & Grant Reporting

SOP 1.1: Processing Expense Reimbursements

- Purpose: To ensure accurate and timely reimbursement aligned with grant requirements.

- Steps:

1. Staff completes digital expense form and uploads receipts.

2. AI system tags expense category and links to appropriate grant.

3. Supervisor reviews and submits to Accounting Manager.

4. Reimbursement issued within 10 business days.

- Roles: Staff, Supervisor, Accounting

- System: QuickBooks, AIOS Dashboard

- Reference: Financial Management Policy, WVHA Grant Guidelines

SOP 1.2: Quarterly Grant Reporting

- Purpose: To compile and submit accurate, timely funder reports.

- Steps:

1. AI compiles activity logs and expense summaries.

2. Program Manager reviews and edits.

3. Final report submitted to grantor and archived in Drive.

- Roles: AI, Program Manager, CEO

- System: AIOS, Google Drive, Grant Portal

- Reference: HRSA & WVHA Grant Contracts

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2. Case Management & Outreach

SOP 2.1: New Client Intake

- Purpose: To establish consistent documentation and eligibility verification.

- Steps:

1. Intake staff completes digital form and uploads ID.

2. AI checks for duplicates or missing documents.

3. Client file created and assigned to Case Manager.

- Roles: Intake Staff, Case Manager

- System: Google Forms, AIOS Case Log

- Reference: HIPAA Policy, Client Intake Procedure

SOP 2.2: Event Coordination

- Purpose: To track outreach events, attendance, and outcomes.

- Steps:

1. Outreach team logs event details and goals.

2. AI tracks materials distributed, attendees, and feedback.

3. Post-event report generated and reviewed.

- Roles: Outreach Staff, Program Coordinator

- System: AIOS, Event Summary Log

- Reference: Opioid Abatement Grant Reporting Requirements

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3. Mailroom & Client Services

SOP 3.1: Secure Mail Handling

- Purpose: To ensure safe, compliant distribution of client mail.

- Steps:

1. Mail received and logged by intake staff.

2. AI sends pickup notifications to clients.

3. ID verified at pickup; record marked complete.

- Roles: Mailroom Staff, Front Desk

- System: Mailroom AI Interface, Log Sheet

- Reference: USPS Handling Guidelines, Internal Mail Policy

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Next steps: Expand with SOPs for HR, Volunteer Coordination, and Emergency Procedures in next version.