Form Development and Document Control SOP

Purpose

To establish a standardized and secure procedure for creating, reviewing, approving, versioning, and retiring internal IT forms and documents. This SOP ensures clarity, version integrity, compliance, and operational efficiency in all form-related documentation used with the IT department. Applies to all IT personnel involved in the creation, revision, and management of internal forms used for IT operations, procurement, incident reporting, access requests, and other support workflows.

1. Procedure
2. Identify need for a new form through operational requirements, recurring requests, or SOP dependencies.
3. Use the approved form template to draft the new form and ensure it aligns with related SOPs and workflows.
4. Draft form must be reviewed by at least two IT staff members for accuracy, completeness, and usability.
5. Submit reviewed draft to IT Lead and HR for final approval.
6. For forms involving HR, finance, or legal implications, obtain additional approval from relevant departments.
7. Store approved forms in a secure, access-controlled internal repository and label clearly with the latest version.
8. Notify all IT team members of new or revised forms during weekly check-ins or via internal email.
9. Use semantic versioning to track changes and maintain a Form Revision History table that includes version, date of change, author/editor, and summary of edits.
10. Replace outdated versions in the shared repository and archive old versions in a separate folder marked “ARCHIVED”.
11. Review all active forms annually or following a major change to related SOPs/systems or after any user feedback that reveals gaps or inefficiencies.
    1. Update forms as needed and redistribute using the same review and approval process above.
12. Mark obsolete or deprecated forms as “Retired” in the document name and move to the “ARCHIVED” folder.
    1. Retain at least one prior version for reference and audit purposes for a minimum of three years.

This SOP should be reviewed annually or after major changes in organizational documentation practices or IT workflows.