SOP Academy
Module 1 - Summary Sheet

What is a SOP?

A Standard Operating Procedure (SOP) is defined a set of detailed, step-by-step instructions to achieve uniformity of performance and maximise efficiency

SOP vs Policies

Healthcare organisations often have extensive libraries of policies.

SOP and Policy are terms that are often used interchangeably, but there are key differences:

Key features of a policy

- Long, high-level document that tells reader what must be done in theory and why
- Broad and open to multiple interpretations
- Can cover many different areas

Key features of a SOP

- Detailed step-by-step instructions that tell reader what and how to do it 'on-the-ground'
- Concise documents that cover a single process
- Specific, albeit allowing for personal judgement where needed
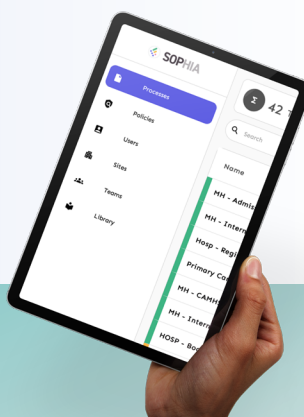
Why are SOPs needed?

Some common consequences of an absence of SOPs

For an organisation

- Well-intentioned people taking shortcuts in processes
- Increase in avoidable risk and avoidable levels of waste and inefficiency
- Difficult to identify and prevent the use of outdated approaches to key tasks

For managers

- Difficult to understand if/how policies are being reflected in daily activities
- Difficult to understand where a staff member may require additional support or training
- Difficult to identify and prevent the use of outdated approaches to key tasks

For staff

- Avoidable source of stress/anxiety as a function of inadequate training
- Backlogs and delays and the consequence of the stresses they create
- Lack of resilience when colleagues are sick/on leave & loss of knowledge when a skilled employee leaves

How SOPs enhance healthcare operations

Improved clinical safety and patient experience

- Ensure processes are safe and comply with regulations
- Support staff in conducting assessments and consistently recording findings in EHRs
- Support delivery of better health outcomes

Improved staff satisfaction

- Reduce stress related to lack of training/incomplete handovers
- Automate or speed up mundane tasks, remove duplication and minimise backlogs

A good SOP contains the following elements

- Clear description and title
- Well structured
- Formatted in a consistent way
- Is appropriately detailed
- Is written as instructions with actionable steps
- Uses additional materials where appropriate
- Assigns every step to a specific team/role type
- Avoids jargon or overly technical terms
- Considers which systems are being used
- Captures all potential pathways and scenarios
- Includes all teams and handovers involved in process

Examples of SOPs worked on in MH

Patient Flow

- Pre-admission pathway from A&E
- Under-18 transition from inpatient ward to community
- Referral to Cognitive Impairment and Dementia Services (CIDS)
- Transfers to private hospitals

Patient Safety

- Clinical risk assessment
- Mental deterioration
- Post-discharge follow-up
- Prevention of falls in community

Internal Organisation

- Local induction of temporary staff
- Student nurse recruitment
- Medical device procurement
- Record keeping

Need a refresher?