

Instructions for Writing a Procedure



University of
Southern
Queensland

These instructions are to be followed when developing new and revising existing procedures and should be read in conjunction with the [Policy Framework](#).

To commence the process, a [Policy Instrument Tracker](#) should be filled out and submitted to the Policy Team via email. A new container will then be set up in Content Manager which will include a procedure template that you will be able to edit. Please see the [Policy Resources Site](#) for further information on the overall process.

There are separate Instructions for [writing a Policy](#) and [writing a Schedule](#).

Please refer to the [Policy Library Style Guide](#) for annotated information on how to structure a policy instrument.

Procedure Title

The title of the procedure must not start with the words 'The', 'UniSQ', 'University' or 'Procedure', or contain an abbreviation. Procedures will be listed alphabetically within policy instrument categories, and the first word of the procedure should be informative to facilitate recognition when scanning the list. 'Procedure' must be the last word of the title (e.g. *Enrolment Procedure*, rather than *Procedure on Enrolment*).

The title of the procedure must use key descriptors that reflect accurately the procedure scope. Where there are multiple descriptors, the title should begin with the broadest descriptor and then be refined with narrower terms following a colon; for example, *Assessment: Alternative Arrangements Procedure* rather than *Alternative Arrangements for Assessment*.

1 Purpose

Describe why the procedure is needed. Begin the sentence with 'To', followed by a verb.

Example – Enrolment Procedure

To set out the processes for enrolling Students.

2 Scope

Identify who the procedure applies and identify any exclusions. Where no exceptions are identified, the scope may be described as follows: 'This Procedure applies across the University'.

Indicate, as appropriate:

- the members of the University community to whom the procedure applies (all Employees and Students; academic Employees; postgraduate research Students, etc.), with particular reference to the following key definitions:
 - [Employee](#)
 - [Student](#)
 - [Research Worker](#)
 - [University Members](#);
- the functions and/or situations to which the procedure applies;
- the type of course, program or activity to which the procedure applies (undergraduate courses; research programs, etc.); and
- if necessary, the boundaries separating the scope of this procedure from that of related University Procedures.

Example – Enrolment Procedure

This Procedure applies to Enrolment at all locations in all programs and Courses at the University.

3 Procedure Overview

This concise (two paragraphs) summary explains the content of the procedures. Start the sentence with 'This Procedure', followed by a verb.

Example – Enrolment Procedure

This Procedure outlines the processes for enrolling Students.

4 Procedures

This section is intended to capture the mandatory process or steps to be followed in order to deal with a particular situation consistent with the principles outlined in the head policy. There may be one procedure or several, each of which may be broken into a series of distinct actions or steps that need to be completed.

The steps in a procedure should be set out in the order that they should be completed. Try to keep the paragraphs short and the explanations simple.

For new procedures, it is strongly recommended to map actions out prior to listing them in the procedure (for example, as a flowchart) and to test actions with users to check that no step is missing and that they are in the correct order. Please feel free to contact the Policy Team for advice.

For each item, state who is responsible for carrying out this step of the procedures. Use position titles, not the names of individual staff members. In order to minimise the need to update content to reflect changes in organisational structure, where possible refer to the 'Accountable Officer' of a named policy instrument.

Do not include information such as calendar due dates or processes that may vary from year to year. This information should be provided in manuals, local processes, or web pages and cross-referenced to the procedures in the Policy Library. Do (if needed) include generic dates, for example, 'on the first Monday after the release of final results'.

If there are consequences related to not following a procedure, these should be included.

Apply caution when using terms such as 'must/will/normally' as these terms can create compliance obligations. If used casually/inappropriately, the University could find itself in a situation where there is audit risk due to a compliance breach of a self-imposed obligation.

Example – Excerpt from Enrolment Procedure

4.3 Commonwealth Support Places

Students who are in a Commonwealth Supported Place are required to submit a Request for Commonwealth Support and a HECS-HELP form prior to Census Date at the commencement of each program.

Failure to submit a Request for Commonwealth Support and HECS-HELP forms by the Census Date for the Semester will result in cancellation of Enrolment.

Students who are in a Commonwealth Supported Place and who are required to make an up-front payment of their Student Contribution Amount must pay in full by the published due date for the Semester.

Students who are eligible to defer their Student Contribution Charge to a HECS-HELP loan must supply their tax file number by the Census Date for that Semester.

Failure to supply a tax file number (or alternatively make full payment of the up-front Student Contribution Charge) by the Census Date for the Semester will result in cancellation of Enrolment.

Students who are in a Commonwealth Supported Place and who are eligible to defer their Student Amenities Fee should submit a request for SA-HELP form prior to the Census date at the commencement of each program.

5 References

Use the [APA referencing style](#) to insert any references to publications used in the development of the procedure. If specific sections of legislation are referred to in the content of the procedure, also add that piece of legislation as a reference.

6 Schedules

The following standard statement is included in all templates:

This Procedure must be read in conjunction with its subordinate schedules as provided in the table below.

Refer to the following section for more information regarding schedules.

7 Policy Information

7.1 Accountable Officer

The Accountable Officer will be determined by the policy type and must be referred to by position title only.

7.2 Policy Type

Indicate whether the head Policy is 'Governance Policy', 'Academic Quality Policy', or 'Executive Policy'. The Policy Framework outlines the different policy types at the University.

7.3 Date Approved

This is the date the procedure was approved by the relevant Approval Authority. No text needs to be entered in this field as it will be updated during the publication process.

7.4 Effective Date

Unless otherwise determined by the Approval Authority, the procedure will become effective from the date it is approved. No text needs to be entered in this field as it will be updated during the publication process.

7.5 Review Date

All new procedures or major amendments to procedures are to be reviewed five years from the date the procedure comes into effect, unless an earlier or later date is approved by the Approval Authority. No text needs to be entered in this field as it will be updated during the publication process.

7.6 Definitions

Definitions should be listed alphabetically and should not be inconsistent with ordinary dictionary definitions. There is no need to define commonly-understood terms, however definitions can be used to define terms that change frequently; e.g. the name of government departments that are referenced through policy instruments.

Acronyms should not be included here but may be included in the body of the document, with the first use cited in full, followed by the acronym in brackets. On separate lines, state each key term followed by a colon, followed by the definition.

7.6.1 Globally defined Definitions

Terms defined in the [Definitions Dictionary](#) have a common meaning across the University. When these terms are used in a policy instrument they should be capitalised in the body of the policy instrument and listed in the metadata table with (Approved) written next to the definition.

If the development of a policy instrument identifies new terms proposed for inclusion in the Definitions Dictionary, they should also be capitalised and captured in the metadata table, with (For Approval) written next to the definition.

7.6.2 Policy specific Definitions

Terms that require explanation but are not likely to have a common relevance across the University should be captured in the metadata table as 'Definitions that relate to this Procedure only'.

7.7 Related Legislation

Use exact titles of Regulatory Compliance Instruments and hyperlink with reference to the Compliance Register. Italicise the full titles of legislation and regulations.

7.8 Related Policies

Use exact titles of directly related policies, as approved and recorded in the Policy Library. Indirectly related policies should not be listed.

7.9 Related Procedures

Use exact titles of directly related procedures, as approved and recorded in the Policy Library. Indirectly related procedures should not be listed.

7.10 Related Forms, Publications and Websites

List any related documents, other than legislation or policy instruments. Any documents referred to in the body of the procedure must be listed in alphabetical order and hyperlinked and may include forms, publications, websites etc.

7.11 Keywords

Users can search for policy instruments in the Policy Library by keyword. Any word in the title or body of a policy instrument as a keyword is automatically included in keyword searches and should not be listed here. Instead, list any other words that users may enter to search for this document. Provide in a single line, in lower case, with each entry separated by a comma.

8 General information

8.1 When drafting a Procedure

Use:

- everyday words
- the same word for the same concept throughout
- terms that are unlikely to change or become outdated (e.g. use position titles rather than the names of individual staff members)
- refer to 'the University' rather than 'UniSQ'
- short sentences
- short paragraphs of no more than 4-5 lines of text
- caution when using terms such as 'must/will/normally' as these terms can create compliance obligations (if used casually/inappropriately, the University could find itself in a situation where there is audit risk due to a compliance breach of a self-imposed obligation)
- active rather than passive voice
- gender-inclusive language (or make gender-specific pronouns plural or reword; avoid the use of 'he/she')
- the third person in preference to the second person (e.g. 'they' rather than 'you')
- the format DD/MM/YYYY for dates (e.g. 21/10/2006).

Avoid:

- wordiness and long chunks of text
- jargon
- the use of double negatives
- acronyms and abbreviations except where necessary - use the full term on the first occasion with the acronym immediately after in brackets; e.g. 'Chief Financial Officer (CFO)', then use the acronym in the remainder of the document.

8.2 Images/graphics

Any images or graphics included in policy instruments must be inserted as a picture only; i.e. jpeg, png, bmp ('SmartArt' will not display on the web). Alternative text must be added to assist readers with a disability. To add, right click over the image, select 'format picture', 'alt text' and insert a short title and description of the image.

8.3 Common terms and definitions

Definitions of defined terms contained in policy instruments are contained in the [Definitions Dictionary](#). All occurrences of a definition must be capitalised.

Definitions are normally developed in conjunction with the relevant policy instrument. If you wish to recommend inclusion of additional terms in the Definitions Dictionary, please contact the Policy Team. Please also refer to the [Instructions for Writing a Definition](#).

8.4 Tables and figures

Number and label tables and figures and refer to them by number. Insert a table title before the table and figure title after the figure, using the following convention:

Table 1: <insert title> (bold text, before table)

Figure 1: <insert title> (bold text, after figure)

8.5 Hyperlinks

Please try to include any links in the metadata table under the 'related forms/websites' section. If hyperlinks are required within the body of the document, then please follow the guidelines below. Contact the Policy team if you have any other specific requirements.

- Link to something only if it helps meet the user's need.
- When referencing policy instruments use the exact title as approved and recorded in the Policy Library:
 - **Write this:** [Higher Degree by Research Student Policy](#)
 - **Not this:** [HDR Student Policy](#)
- Write link text that makes the destination clear and avoid using non-descriptive terms like 'Click here':
 - **Write this:** Find out more about our [upcoming events on our Events page](#).
 - **Not this:** [Click here](#) to find out about our upcoming events.
- Put most links at the end of sentences:
 - **Write this:** Find out your eligibility for enrolment by filling out the [application form](#).
 - **Not this:** You need to fill out the [application form](#) to find out if you are eligible for enrolment.
- Write short calls to action that explain what they do:

- **Write this:** [Start your application](#)
- **Not this:** [Click here to apply](#)
- Link email addresses not names:
 - **Write this:** sara.surname@unisq.edu.au
 - **Not this:** [Sara Surname](#)

8.6 Template Fields

Procedures should be written as though they are already approved. The language used should reflect that.