* *Italicized instructions provided in this template are for guidance in Procedure creation. Please delete the instructions as you add content.*
* *Please delete any sections marked with “if applicable” if they do not apply to your Procedure.*
* *You may add subsections as needed, but main sections should remain consistent with this template.*
* *Procedures are optional documents making them more flexible. Procedures may contain “Standards” information if doing so would be clearer to the intended audience than having separate documents.*

# Unit Procedure

# Title

*(Unit Name)* \_\_\_\_\_\_\_\_\_:Procedure for \_\_\_\_\_\_\_\_\_

* *What is a short, descriptive title that will tell users what this Procedure is about?*
* *Does this Procedure relate to a Policy? If so, the title should reflect that connection. For example, if there is a “Unit: Policy on Tree Management”, this would be a “Unit: Procedure for Tree Management”.*

# Introduction

## Purpose

* *What process are you trying to explain?*
* *Is there background information that is helpful to understanding this Procedure?*

## Scope

* *Who does this Procedure apply to? (Keep in mind that a Unit Procedure can only apply to the same Unit)*
* *Are there particular groups within the Unit who must know and follow this Procedure?*
* *Are there groups within the Unit that this Procedure does NOT apply to?* 
  + *If it’s a succinct statement, you can exclude groups here.*
  + *If the exclusions will take more space to explain, use the “Exclusions” section below.*

# Procedure

*The Procedure should:*

* *Be written for the intended audience to understand;*
* *Clearly explain the University's rules and objectives;*
* *Outline all necessary steps for achieving those objectives;*
* *Outline how to do each of the necessary steps;*
* *Be written in plain language;*
* *Use roles or titles (i.e.. Associate Director of Ethics and Policy) instead of a particular person (i.e. John Doe);*
* *Be as concise as possible, while remaining thorough; and*
* *Incorporate the University’s Style Guide to address equity and accessibility needs.*

## Exceptions *(if applicable)*

* *Are there any times this Procedure shouldn’t be applied?*
* *If specific groups can’t be succinctly excluded in the “Scope” section:* 
  + *Expand on common situations when this Procedure wouldn’t be applied and how those situations would be handled, or*
  + *Reference a different Policy document that would apply in those situations.*

# Definitions *(if applicable)*

* *Refer to the related Policy which includes all definitions for that Policy and related policy documents including this Procedure.*
* *If there is no related Policy, what keywords or acronyms have you used in your Procedure?*

# Related Requirements

## External Regulations *(if applicable)*

* *Is this Procedure connected to any Policies, Laws (federal, state, local, regulations), Accreditation requirements?*
* *Are there any related UNC system-wide policies, procedures or standards?*
* *Is this Procedure connected to any UNC-Chapel Hill Policies, Procedures, or Standards?*
* *Are there any other resources or materials readers of this Procedure might likely refer to or need to follow or understand this Procedure?*

## Unit Policies, Standards, and Procedures *(if applicable)*

* *Is this Procedure connected to any Unit Policies, Procedures, or Standards?*

# Contact Information

*Any reader of this Procedure needs to be able to contact someone with questions about this Procedure or to provide feedback. The Procedure can name:*

* *A particular individual (i.e. John Doe),*
* *A specific title (i.e. Associate Director of Ethics and Policy), or*
* *A general contact (i.e.* [*policy@unc.edu*](mailto:policy@unc.edu)*).*

*That person will be the point of contact for all questions relating to the Procedure in general.*

*If there are individuals/groups that have particularized knowledge of subsections of this Procedure, those people/groups may be listed under “Other Contacts” to provide additional information to the reader.*

## Primary Contact

**Name:**

# Telephone:

**Email:**

## Other Contacts *(if applicable)*

**Subject:**

**Name:**

**Telephone:**

**Email:**

## Publication Details

* Who is the “Issuing Officer”? \_\_\_\_\_\_\_\_\_\_\_   
  *This is the person with the authority to issue this Procedure* *on behalf of the University – they may be a Dean/Vice Chancellor, but are normally a designee of the Unit’s Issuing Officer.*
* What is the “Effective Date”? \_\_\_\_\_\_\_\_\_\_\_   
  *This is when the Procedure goes into effect.*
* What is the “Next Review Date”? \_\_\_\_\_\_\_\_\_\_\_  
  *The Procedure should be reviewed on a regular basis to make sure all content, links, etc. stay up-to-date. The default interval for review is one (1) calendar year but you may choose a date three (3) calendar years away for items that are less risky and/or less likely to change over time (for example, policies that rely on external regulations). You may also choose a date that fits best with your Unit’s annual schedule.*