



SOP Review and Version Control SOP

Update a procedure with traceable review, a clear effective date and withdrawal of superseded copies.

Library resource updated 2026-10-28. Assign your own approved document version and effective date.

Document control

Organization and site _____

Document ID and approved version _____ Effective date _____

Process owner Process owner Assigned person _____

Reviewer and approver _____ Next review _____

Purpose and boundary

Keep a team's working instructions aligned with the currently approved process and prevent an edited draft from silently replacing the version people use.

Internal routine operating procedures, from change request to release and follow-up. Excludes regulated document-control certification, legal policy approval and any claim that a software timestamp proves training.

Responsibilities and preparation

- Author: drafts changes and records their basis.
- Reviewer: checks the method and exceptions against actual work.
- Approver: authorizes the effective version.
- Team lead: replaces access points and communicates the change.

Have ready Current approved SOP and revision log; Change request and demonstration evidence where permitted; Controlled document location and distribution list

Adapt before use

- Define document IDs and version numbering.
- Name reviewers and approval authority for each procedure.
- Choose the current-version location and archive access.
- Specify when a change requires new training or a new demonstration.

Pilot the adapted method with authorized personnel. Resolve gaps and record approval before independent use. This resource is not a certification or technical authorization.

Worked example

Example only: A tool change alters step 4. The author creates draft 1.1 and clears prior approval. Review identifies an affected checklist and demonstration. After approval, the lead replaces both links and records a supervised practice check. Version 1.0 remains archived and visibly superseded.

Procedure steps 1 to 4

01 Log the change trigger

Record what changed, why it matters and which procedure is affected. Identify whether the current version needs immediate restriction while the change is reviewed.

Acceptance check: Change request names a process owner and a concrete issue.

Record: Request, source version, reason and urgency.

02 Create a separate draft

Copy the current version into a draft with a new revision identifier. Clear inherited approval and effective-date fields so a prior signature cannot imply approval of changed work.

Acceptance check: Draft is visibly distinct from the approved version.

Record: Draft ID, source revision and author.

03 Check against actual work

Review the proposed sequence with a person authorized to perform it. Use a permitted demonstration or walkthrough and identify gaps in steps, outcomes and exceptions.

Acceptance check: Revised instructions reflect observed or otherwise verified work.

Record: Reviewer, review basis, gaps and corrections.

04 Assess the effect on users

List roles, tools, locations, checklists and training materials affected. Decide which changes need communication, supervised practice or a replacement demonstration.

Acceptance check: The rollout plan covers affected users and dependent materials.

Record: Impact list, communication and training actions.



Complete the procedure

05 Approve the effective version

The named approver reviews the draft and records approval or required revisions. Set an effective date only after approval. Never invent a reviewer identity.

Acceptance check: Version, approver and effective date are traceable.

Record: Approval record and effective version.

06 Replace access points

Publish the approved version to the current-version location. Withdraw or clearly mark superseded printed and digital copies, including outdated video links.

Acceptance check: Normal team access resolves to the effective revision.

Record: Distribution check, archived version and replacement record.

07 Confirm adoption and review

Record communication and any required practice separately. Check that a sample of actual use follows the new version and schedule the next review or trigger.

Acceptance check: Receipt, training and observed use are not conflated.

Record: Communication, practice result, use check and review trigger.

Exceptions and escalation

Reviewer finds the new sequence incomplete

Keep the draft out of normal use, assign the gap and repeat review before approval.

Old printed copies remain in use

Identify locations, replace copies and notify the team lead; record the correction.

An urgent temporary method is needed

Use the organization's authorized temporary-change process with an owner and expiry; do not label an unapproved draft as permanent.



Working record and review

Complete this record for an actual use. Keep supporting evidence in your approved system; exclude passwords, access codes and unnecessary personal details.

RECORD FIELD	ENTRY
Job or session reference	
Date and location	
Outcome and limitations	
Open action and next owner	
Target date and recheck result	
Prepared and reviewed by	

Final checks

- Drafts do not inherit prior approvals.
- The current-version link opens the intended effective revision.
- Training attendance is distinct from evidence of correct use.

Show the approved method

- Record a dummy revision request and compare old and proposed steps.
- Demonstrate how a reviewer checks the work against a permitted video.
- Show replacement of the current-version link without exposing private documents.

Record with permission, use dummy records and remove private details. Review any generated draft against the demonstration before team use. Check current access and video limits at vid2sop.com.

Template source: <https://vid2sop.com/sop-templates/sop-review-version-control-sop/>

Background references provide context, not endorsement: <https://www.smartsheet.com/content/standard-operating-procedures-manual>

Use: adapt for your organization's internal operations, including paid service delivery. Do not resell unmodified library files as a competing template product. Brand and document layout refreshed; procedure text unchanged.